Творческие индустрии
Branża kultury i branża twórcza
Kultūras un radošās industrijas
Kultur -und kreativwirtschaft
Kūrybos ir kultūros pramonės

11 DIMENSIONS

Trends and Challenges in Cultural and Creative Industry Policy Development within the Northern Dimension Area

Kreativa näringar
Skapandi greinar
Loomemajandus
Kreative erhverv
Kulturnæringen
Luovat alat

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Report to the Northern Dimension Partnership on Culture
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NORTHERN DIMENSION PARTNERSHIP ON CULTURE

NDI NORTHERN DIMENSION INSTITUTE

Aalto University

11 Dimensions

Trends and Challenges in Cultural and Creative Industry Policy Development within the Northern Dimension area

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Contents

Dear Culture and Creative Industries devotees,

Northern Dimension Partnership on Culture (NDPC) has been around for five years, since 2010, with the ambitious aim to contribute to the social and economic development in the Northern Dimension (ND) area. The NDPC focuses on the improvement of operational conditions for cultural and creative industries (CCI), bridging the gap between various resources of CCI funding and strengthening cooperation between the CCI operators, business communities as well as public sector and international institutions throughout the ND region.

One of the key aspects of successful process facilitation is knowledge and information based actions. The NDPC from the beginning of its work has developed strategic action lines in the direction of networking, communication, information provision and flagship project support, as well as carried out some sector-focused studies. However, knowledge about broader patterns of CCI policy developments and funding mechanisms, as well as the best practices in various CCI sectors in the ND area was needed in order to develop coherent longer term strategies.

In this task, the most obvious and corresponding partner for the NDPC turned out to be the Northern Dimension Institute (NDI) who in close collaboration with the NDPC partner countries' stakeholders in both public and private sector carried out the study "**11 Dimensions. Trends and Challenges in Cultural and Creative Industry Policy Development within the Northern Dimension Area**".

When reading this publication you will find out that the terrain of CCI in the NDPC partner countries is vastly different: from advanced and innovative policies and public-private collaboration patterns to budding policy formulations, institutions and initiatives; and that entirely unified best approaches are probably impossible. The NDI indicates successes, challenges and potentials for the CCI in the ND area – while emphasizing that the CCI have lately been recognized to be the key driver of economic development and their role has been rapidly growing in the world economy. Therefore, we should strive to make the most of the NDI findings in the "**11 Dimensions**…" for the long term strategies of CCI action development, for learning from the best practices and designing for most targeted interferences for the benefit of the CCI.

Ilze Gailite Holmberg
Senior Adviser, NDPC

PREFACE

The Northern Dimension area comprises a very heterogeneous region in terms of cultural and creative industries (CCI). This heterogeneity stems largely from the fact that the countries are at different stages of development considering the CCIs. As a result, there are differences in how the CCIs are viewed and the focus and real actions taken to develop the sector are varied. Recognizing this heterogeneity, the Northern Dimension Partnership on Culture commissioned the Northern Dimension Institute to analyze the CCI policies and best practices within the Northern Dimension area. The aim of this analysis is to facilitate the NDPC in designing its future strategy and focus areas to foster the CCI development throughout the Northern Dimension area.

The analysis was executed by Aalto University School of Business, the lead coordinator of the Northern Dimension Institute. The project team comprised of Piia Heliste and Otto Kupi (Center for Markets in Transition) and Silja Suntola (Small Business Center) at the Aalto University School of Business. The analysis was based on extensive review of existing policy documents, strategy papers and action plans at mainly national and transnational levels. We utilized also existing research reports addressing CCIs from regional, national and international perspectives. In addition, we conducted 21 interviews among CCI experts throughout the ND area. We thank the interviewees for their valuable insights, and Ilze Gailite-Holmberg and the NDPC Steering Committee for fruitful discussions throughout the project.

Northern Dimension Institute (NDI) is an open network currently comprising of roughly 30 universities and research institutes across the Northern Dimension area. NDI pools expertise primarily in the four priority sectors of the ND Policy (i.e. transport and logistics; culture; public health and social well-being; and energy and environment) as well as business and economy. NDI builds a bridge between the academia, public sector and business actors. In this role, NDI aims to ensure that the decision makers have the necessary information and fulfils the information gaps when needed. This report is a good example of NDI's information generation activities.

NDI also raises awareness of the Northern Dimension by maintaining a website www.northerndimension.info and publishing a quarterly newsletter ND Newsflash. These means serve to disseminate and promote information and expertise related to the Northern Dimension among the decision-makers and society at large.

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1. BACKGROUND

Cultural and creative and industries (CCI) have lately been recognized as a key driver of economic development and their role has been rapidly growing in the world economy. In Europe, the CCIs contributed to 4,2 % of GDP in 2012[1]. Furthermore, the products, services and skills generated by the creative industries are a source of sustainable competitiveness and innovation also in other sectors of the economy, as acknowledged in various national and international strategies and policy programs. This is based on the fact that competitiveness is increasingly dependent on immaterial value production. CCIs are also important generators of employment. For example, in the EU28, the CCI sector is the third-largest employer, directly or indirectly employing 3,3 % (in 2012) of the EU's active population[2] and the job creation in CCIs has continued to grow even during the challenging economic times. Cultural and creative industries have also non-monetary value providing social wellbeing in various ways. As such, they play an important role in attracting talented people, investors and entrepreneurs.

Cultural and creative industries have also been raised as one focus area within the Northern Dimension policy. The Northern Dimension Partnership on Culture (NDPC) was established in 2010. The NDPC focuses on improving the operating conditions for CCIs, by bridging the gap between public and private funding and strengthening cooperation between the CCIs and the business community[3]. Furthermore, the NDPC aims to act as a complement to already existing organizations working with cultural cooperation and exchange, advocate for the potential of the CCIs, to provide a platform to facilitate dialogue and exchange of best practices and follow the policy development for CCIs[4]. The NDPC members include Denmark, Estonia, Finland, Germany, Iceland, Latvia, Lithuania, Norway, Poland, Russia, Sweden and the European Commission. The NDPC secretariat is currently located in Riga.

In order to facilitate the efforts of the NDPC to contribute to improving the operating conditions for CCIs and strengthen the cooperation in the sector throughout the Northern Dimension area, an analytical study of the prevailing situation was carried out by the Northern Dimension Institute/Aalto University School of Business. The analysis was based on extensive review of existing policy documents, strategy papers and action plans at mainly national and transnational levels. Also existing research reports addressing CCIs from regional, national and international perspectives were utilized in the analysis. In addition, 21 interviews were conducted among CCI experts throughout the ND area.

The report is structured as follows. Section 2 gives a brief summarizing overview of the status of CCIs in the ND area. In section 3, the general trends and characteristics of CCIs affecting policy development are discussed. Also some examples of ND countries' responses to certain challenges in CCI policy development are presented. In section 4, the CCI policy development in each ND country is briefly discussed and some examples of innovative CCI policies and support mechanisms are presented. The report concludes with a discussion about NDPC's role and potential focus areas of its future activities (section 5).

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[1] EY (2014). Creating growth. Measuring cultural and creative markets in the EU. http://www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/$FILE/Creating-Growth.pdf
[2] EY (2014). Creating growth. Measuring cultural and creative markets in the EU. http://www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/$FILE/Creating-Growth.pdf
[3] Northern Dimension Partnership on Culture (2015). Vision and Mission. http://www.ndpculture.org/ndpc/vision-and-mission
[4] Northern Dimension Partnership on Culture (2015). About us. http://www.ndpculture.org/ndpc

2. STATUS OF THE CULTURAL AND CREATIVE INDUSTRIES IN THE NDPC REGION

Cultural and creative industries are developing and growing rapidly throughout the ND area. In many of the ND countries the CCIs have been growing faster than any other sector of the economy during the past few years. Nevertheless, the ND countries comprise a very heterogeneous region in terms of CCIs. This heterogeneity stems largely from the fact that the countries are at different stages of development considering the CCIs. Depending on the stage of development, there are considerable differences in how the CCIs are viewed ranging from traditional arts and culture to focus on creative economy. Similarly, there are differences in which sub-sectors are included under the CCIs. Furthermore, the CCIs are only beginning to have a national policy status throughout the region, and the focus and real actions taken to develop the sector are varied.

In the **Nordic countries**, the CCIs have been gaining increasing attention both among the larger public and policy makers since the 1990s. The Nordic countries are in many respects considered as pioneers in the creative industries and Nordic firms are globally well-known in such CCI sectors like gaming and design. It is also generally acknowledged that CCIs have big potential and they grow faster than most other sectors in the Nordic countries. They are also seen as the basis for local economic regeneration, regional development, and national competitiveness in the Nordic region[5]. Furthermore, there has been a tendency of re-defining CCIs along the lines of the experience economy and the interface between culture and business. The overall understanding of CCIs has evolved from content industry into "*intangible value creation, in which the creativity itself is seen as a competence*" (FI1). Despite the favorable development of the general climate, the Nordic interviewees still felt that there is room for improvement e.g. concerning the roles of the regional and national policy makers and possibilities involved with the new ways of applying creative competencies into the wider economy. Furthermore, despite the many similarities, the Nordic countries have differing focus areas and policies to support CCIs.

> "*The view has changed in the recent years, perhaps around 3-4 years. Until then the CCIs where generally viewed as a supplement or entertainment. I think that the CCIs are slowly beginning to get recognized as a "real" industry which has a great impact on the economy*" (IS2).
>
> "*There is still a long way to go before the country and the politics reflect the importance of the CCI*" (NO2).
>
> *"CCIs are medium high on the agenda in talks*" (DK2).

The Nordic cooperation in CCI policy development and exchange of experiences has long roots and established forms. The Nordic Council of Ministers initiatives have been one of the most important forums for Nordic cooperation. They include e.g. KreaNord, an initiative designed to improve the growth prospects of the CCIs in the Nordic Region. KreaNord was initiated in 2008 and it was running until 2015. KreaNord was conducted in partnership of Nordic culture and business ministers and it focused on fashion, music, publishing, design, architecture, animation and film. According to an interviewee, the KreaNord has succeeded to create a "*Nordic dialog on the governmental level about the creativity and the importance of the creative industry*" (FI3). In addition, a common understanding was reached that "*we are in quite different levels with various viewpoints and actions aimed to develop the field*" (FI3).

[5] Rómulo Pinheiro & Elisabet Hauge (2014). The case of cultural and creative industries (CCIs) in Norway. City, Culture and Society 5, pp. 87–95. Elsevier Ltd.

In the **Baltic Countries**, the development of the CCIs has been very rapid in particular during the past five years. The concept of CCIs was first introduced in policy documents in the latter half of the 2000s in all the three countries at least partly based on the influence of the British Council[6]. Currently, the situation is in many aspects almost comparable to the Nordic Countries. According to the interviewees, for example in Estonia, "*all CCI sectors and subsectors are organized and developed very well*" (EST1). However, *"in a small country like Estonia, the CCIs are still very small, very weak, compared to the rest*" (EST2). According to a Lithuanian interviewee, CCIs are also recognized to be a "*productive part of the economy, as the added value generated by a statistical employee in CCI is higher than the average*" (LT1). Awareness and recognition of CCIs potential has thus increased considerably, but despite the fact that "*there is more awareness of CCIs than 5 years ago*" and CCIs are "*one of the priorities of the Ministry of Culture*, it was still argued that CCIs are not "*high on the political agenda of the government [as a whole] and the concept is not fully understood by the sector itself and the society*" (LV1). There are also considerable regional differences and in all the three countries the majority of CCI firms are located in the capital cities.

The Baltic countries have been working together since 2006 to develop the CCIs. The cooperation has included sharing of best practices as well as formulating joint stands and arguments within the European Union. They have also been successfully applying EU structural funds to develop the infrastructure and human resources within the CCIs[7].

In **Germany**, the role of CCIs in the economy in general is considered to be "*emerging and the awareness-raising phase is over*" (DE1). The German policy making system is also considerably different than in the smaller countries within the ND area, consisting of federal (national), state (*Bundesländer)* and regional levels. There is a specific national level program for CCIs, but there are big differences in how the states and regions perceive CCIs. For example, Berlin is one of the concentration hubs of CCIs on a global scale and the CCIs have had a huge impact on urban development there. At the same time there are regions where CCIs are not prioritized as much. This is at least partly due to the structure of the local economies, where the traditional industries, such as automotive, chemical and engineering play an important role. However, this could provide opportunities to the CCIs in the region, because the government "*has expectations"* that there will be "*cross-sector activity linking the creative industries to the traditional industry*" (DE2). In general, there are "*a lot of expectations about the [CCI] sector*" and there is "*strong interest*" towards CCIs (DE2). The "*common understanding is reached that CCIs have economic potential,* however, *"adequate follow-up actions for the support of CCI is often missing*" (DE1).

Also in **Poland**, the CCIs started developing in the 2000s. In general, the CCIs are "*perceived high on national and regional level*" and "*national and regional authorities are looking for good ideas for CCI development*". In addition, CCIs are considered as "*a tool for effective allocation of structural funds*" (PL1). However, there is clearly a need for experience and best practice exchange among the policy makers on how to best support the CCIs. The regional differences within Poland's CCI development are also large.

In **Russia**, the concept of creative industries is only emerging and the CCIs' economic value has fairly recently started to gain recognition. According to the interviewee, "*it started to get better [before the current economic crisis] showing that even at the ministry level there is huge interest towards creative*

[6] Estonian Ministry of Culture (2011). Creative industries in Estonia, Latvia and Lithuania.
[7] Estonian Ministry of Culture (2011). Creative industries in Estonia, Latvia and Lithuania.

industries" (RU3). Today, "*they claim that creative industries are important for the country, but before recent times, there weren't development programs for creative industries*" (RU3). However, the very concept of the "*creative economy is still definitely not understood in a wider sense*" (RU2). Due to the major importance of the oil and gas based industries for the Russian economy, "*the creative industry is not really their [the governments'] priority*" (RU1). At the federal level, "*the CCI development is so very new*" (RU2). The focus has so far been mainly on cultural tourism, which is "*still high on the agenda*" (RU2). One challenge is that there is no new information and statistics available about the CCIs in Russia. As for the innovation, cultural, educational and business policies, "*CCIs are here and there mentioned, and the role is acknowledged, but definitions of CCIs or CE [creative economy] are lacking*" (RU2). In addition, the very existence of creative entrepreneurship remains unclear, because "*people who are in the creative industries usually do not call themselves as part of the creative industry or creative entrepreneurs*" (RU1).

> "*CCIs are not recognized as important actors. At the same time they cannot be classified. They are in between culture and economy. Legally they do not exist*. *Who decides what are creative industries? They do not recognize it themselves either. Even the Committee of Culture doesn't*" (RU2).

Despite the different stages of development, the CCIs within the ND area share various characteristics and trends, including e.g. small size of the companies, fragmentation of the sector, and challenges and opportunities related to digitalization. All these characteristics affect policy making. These will be discussed next.

3. CHARACTERISTICS AND TRENDS AFFECTING POLICY DEVELOPMENT WITHIN THE CCIS IN THE NORTHERN DIMENSION AREA [8] [9] [10] [11] [12][13] [14] [15] [16] [17] [18] [19] [20] [21] [22] [23] [24] [25] [26] [27] [28] [29] [30] [31] [32] [33]

Lack of definition and data on CCIs – more solid knowledge base needed

Cultural and creative industries can be defined in multiple ways. In Europe, the British definition of CCIs is often used as the basis: "*the creative industries are those industries which have their origin in individual creativity, skill and talent, and which have the potential for wealth and job creation through the generation and exploitation of intellectual property"*[34]. However, there are variations between different countries in which specific sub-sectors are included under the concept. The definitions of CCI vary also within the Northern Dimension area (see Appendix 2 for more information). Furthermore, the CCIs are a rapidly developing sector where new sub-sectors have been emerging during the past few years. This has mainly been a result of digitalization and other technological developments. Thus, there is a constant need to update the definition of CCIs on a subsector level in order to keep up with the developments in the industry.

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[8] Deutsche Bank (2011). Cultural and creative industries. Growth potential in specific segments. Deutsche Bank Research. Frankfurt am Main, Germany. http://www.dbresearch.com/PROD/DBR_INTERNET_EN-PROD/PROD0000000000272899/Cultural+and+creative+industries%3A+Growth+potential+in+specific+segments.pdf

[9] European Union (2013). Analysis report on Creative Industries. INTERREG IVC, Thematic Programme Capitalisation. Lille, France.

[10] Lucia Seel & Anna Whicher (eds.) (2012). Joint Policy Recommendations for Cultural and Creative Industries in Europe. Joint project publication of CREA.RE, SEE, ORGANZA, Creative Metropoles and InCompass.

[11] European Commission (2010). Green Paper - Unlocking the potential of cultural and creative industries. Brussels. COM(2010) 183.

[12] KreaNord – Nordic Creative Economy (2012). Big Changes – Big Opportunities. English summary. Analysis of developments in policy to promote cultural and creative industries in the Nordic Region 2007–2012.

[13] Benjamin Reid, Alexandra Albert and Laurence Hopkins (2010). A Creative Block? The Future of the UK Creative Industries. A Knowledge Economy & Creative Industries report. The Work Foundation.

[14] Creative Regions – Crea.re (2012). Best-of Crea.Re. The Project's final publication with a collection of the most Important public works.

[15] KreaNord – Nordic Creative Economy (2012). Big Changes – Big Opportunities. English summary. Analysis of developments in policy to promote cultural and creative industries in the Nordic Region 2007–2012.

[16] Federal Ministry of Economics and Technology (2009). Culture and Creative Industries in Germany. Summary. Research Report No 577. www.bmwi.de

[17] Open Method of Coordination (OMC) Working Group of EU member states' experts on cultural and creative sectors. Good Practice Report on the cultural and creative sectors' export and internationalization support strategies. European Agenda for Culture. Work Plan for Culture 2011-2014. January 2014.

[18] European Commission (2010). Green Paper - Unlocking the potential of cultural and creative industries. Brussels. COM(2010) 183.

[19] Jo Foord (2008). Strategies for creative industries: an international review. Creative Industries Journal. Volume 1, Number 2. Intellect Ltd.

[20] Lucia Seel & Anna Whicher (eds.) (2012). Joint Policy Recommendations for Cultural and Creative Industries in Europe. Joint project publication of CREA.RE, SEE, ORGANZA, Creative Metropoles and InCompass.

[21] Creative Industries Finland (2011). Creative economy and beyond – Insights from Finland. Aalto University School of Economics, Small Business Center.

[22] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.

[23] European Commission (2012). Promoting cultural and creative sectors for growth and jobs in the EU. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Brussels, 26.9.2012. COM(2012) 537 final.

[24] Utrecht School of the Arts HKU (2012). The entrepreneurial dimension of the cultural and creative industries. Utrecht, Netherland.

[25] Creative Industries Council (2012). Report. Access to Finance Working Group. United Kingdom.

[26] Lucia Seel & Anna Whicher (eds.) (2012). Joint Policy Recommendations for Cultural and Creative Industries in Europe. Joint project publication of CREA.RE, SEE, ORGANZA, Creative Metropoles and InCompass.

[27] European Union (2013). Analysis report on Creative Industries. INTERREG IVC. Thematic Programme Capitalisation. Lille, France.

[28] Nesta (2011). A Guide to Creative Credits. London, United Kingdom.

[29] Piia Nikula & Anu Penttilä & Otto Kupi & Juhana Urmas & Kirsi Kommonen (2009) Sirpaleisuudesta kilpailukyvyn keskiöön – Asiantuntijoiden näkemyksiä luovien alojen kansainvälistymisestä. Mikkeli Business Campus Publications N-84. Helsinki School of Economics.

[30] United Nations (2013). Creative Economy Report 2013. Special Edition. Widening Local Development Pathways.

[31] European Creative Industries Alliance (2014). Create, innovate, grow. A new policy agenda to maximise the innovative contributions of Europe's creative industries. Recommendations from the Policy Learning Platform of the European Creative Industries Alliance.

[32] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.

[33] Ministry of Employment and Economy Finland (2014). Government Resolution on a policy programme on intangible value creation.

[34] Department for Culture, media and Sport 1998. Creative Industries Mapping Document. United Kingdom.

In addition to being difficult to define, the CCIs are also difficult to measure. This is a challenge for policy-makers who need quantifiable data to back-up their decisions. Reliable statistical data on the sector is difficult to collect as the traditional statistical data collection methods do not suit the purpose. It has been advised that more data and statistics should be collected by expert groups on CCIs for the evidence base. Development of standardized criteria for the measurement of economic impact and performance of the CCIs would provide more reliable data to support policy and business aid measures' development. Also, regional and local data on the CCI is needed for the basis of policies and programmes for "place-based development" i.e. that promote e.g. creative hubs. Finally, when assessing the impacts, value and contribution of the CCIs, also the non-monetary value of the CCIs, which they create for the social, economic and sustainable development, should be recognized.

Lack of data was acknowledged as a big hindrance for policy development and awareness-raising also among the interviewed CCI actors throughout the ND area. A more solid knowledge base is needed both within the CCIs as well as in other sectors to raise the awareness and understanding of the potential of the CCIs among both business and public authorities. This applies to all countries in the ND area. Without "*statistics about contribution of CCIs to economy*", the government cannot respond to the needs of the CCI sector and create the "*relevant legal framework and support mechanisms*" (LT1).

> "*There are not enough facts and numbers to explain why we have to focus on the cultural and creative sector. It is easier to argue the importance of the sector if you can talk the same language as the majority. And we have to fully understand the mechanisms of the industry with its long value chains and differences to be able to suggest how we can make new and different support mechanisms. But to implement new support mechanisms is also difficult. The whole system (in Norway) is made to support product development in traditional industry, not knowledge and service based innovation*" (NO2).

Furthermore, due to national differences in the definition of CCIs and lack of data at the national level, statistical information allowing cross-country comparisons within the ND area is largely lacking. Currently, the mapping exercises conducted in different countries are usually not comparable because of the differences in methodologies applied. Also in this respect, the development of standardized criteria for the measurement of economic impact and performance of the CCIs would be helpful.

More solid knowledge base and awareness-raising is needed also for the purpose of encouraging people with creative talent to engage in business. Currently, the perceptions about creative entrepreneurship seem to differ somewhat between the ND countries. In many ND countries entrepreneurship and business still seems to be considered an inferior option to 'purely' artistic and cultural activities. For example, a Swedish interviewee claimed that "*cultural makers tend to see this form of doing as a threat against to culture*" (SE1) and do not want their "*integrity compromised*" (SE1). This view was very strong in Russia and it was raised also by e.g. Finnish and Norwegian interviewees. However, according to a Danish interviewee, "*there is high prestige for being a creative entrepreneur, but low for being an artist*" (DK2).

The interviewees claimed that although the general attitudes towards the CCIs have changed for example in the Nordic countries to more positive, CCIs are still considered inferior to other industries which is illustrated by the fact that the other industries receive "*more recognition regarding governmental support*" (IS2). In general, "*there is openness and interest but at the same time not very* *clear view how to work with these questions*". This is not the case only "*with the politicians, it is a more general problem as well*" (IS1).

> "*Larger organizations and business associations still don't understand what CCIs are and what they do*" (SE1).
>
> "*[CCIs are not] high on the political agenda of the government [as a whole] and the concept is not fully understood by the sector itself and the society*" (LV1).

Fragmented field

Cultural and creative industries consist of various sub-sectors ranging from performing arts and handicrafts to design and software development. They have very different business logics and support needs, and all the sub-sectors do not necessarily even consider themselves as being part of the CCIs. Furthermore, the CCIs are rarely represented by a single horizontal interest organization but there is typically a plentiful of sub-sector specific interest organizations. Instead of cooperating and joining forces they often tend to compete with each other to get their voices heard among the policy-makers. Due to this fragmentation, the interest organizations typically have only limited capabilities to create joint agendas or represent the sector. This was also acknowledged by the interviewees, stating that there is a need for "*different organizations to collaborate more and to create a sector*" because the term CCI is "*very much a political or a research term*" (SE1).

Because of the fragmentation of the CCIs and lack of strong lobbyists for the sector, in the worst case, the general support mechanisms targeted for all CCIs in practice do not meet the needs of anyone. Therefore, understanding the characteristics of CCIs and its various sub-sectors is essential for efficient policy making. Thus, in addition to improving the evidence-base of CCI policies, also the dialogue and cooperation across different policy areas needs to be increased.

Inter-ministerial cooperation needed in policy development

Development of policies targeted to CCIs falls under the jurisdiction of several ministries, including at least ministries responsible for culture, business and economy, innovation, education, regional development and internationalization. Often, the ministry of culture may have the overall responsibility of the development of the CCIs. In practice, however, it is usually the ministries responsible for business and economy that are in charge of drafting policies aimed to foster entrepreneurship, innovation, growth and general development of the business environment. Also the ministry for foreign affairs may be involved by providing support for internationalization and export promotion. The ministries of education carry the responsibility of enhancing creativity in general in education as well as strengthening the entrepreneurial emphasis also in arts and culture education. Because of the potentially big role of CCIs for local and regional economies, also ministries responsible for regional development may be involved. Coordination of the actions between different ministries would be essential for efficient CCI policy development but in reality this does not always take place. Lack of *"clear distribution of work between different ministries*", "*missing constructive cooperation between different ministries and understanding of the potential of CCIs*" and also "*missing political priorities in CCI sector*" (LT1) can pose real challenges for the development of operational frameworks of CCIs.

Within the ND area, various formats have been developed to organize and facilitate inter-ministerial cooperation. For example in Latvia, a Consultative Council for Creative Industries acts as a "*strategic think-thank bringing different stakeholders from public and private sector together, helping them to create policies and funding mechanisms"* (LV1), and in Sweden, the Ministry of Culture and the Ministry of Enterprise, Energy and Communications have set up an inter-ministerial Council for Cultural and Creative Industries that supports the governments' work with the national work plan on cultural and creative industries and initiatives[35]. In Finland, inter-ministerial cooperation takes mainly place in ad hoc government committees and working or steering groups set up to address specific issues. In addition, for example the KreaNord has facilitated inter-ministerial cooperation between culture and business ministries in the Nordic countries.

> "*I think that the most important achievement [of KreaNord] is that we had the first cooperation between the cultural ministers and business ministers. It was the first time that they came together on the topic… It has been cross-sectoral steering of the project*" (DK3).

It seems that the effectiveness of inter-ministerial coordination depends also of the status of CCIs in the political agenda. There is more emphasis on inter-ministerial coordination in those countries, where CCIs are viewed as a central part of the national innovation ecosystem.

Education and business skills

A clear majority of companies in the CCIs are small and medium sized with micro enterprises (employing up to ten people) and 1-man firms dominating. There are also a lot of freelance workers and lifestyle entrepreneurs in CCIs. The work itself can be project-based and temporary by nature, and businesses prototype-based. This causes in many cases strong fluctuations in income. Consequently, there is a relatively high insecurity of employment resulting in the small number of permanent employees in companies. In addition, the companies are often highly dependent on certain "star" products or services, individual talent and personal risk taking.

Typically, entrepreneurs in the CCIs rarely have any business education. As a result, the SMEs in CCIs lack business, entrepreneurial, management, production and marketing skills as well as knowledge about immaterial rights and internationalization. Due to this, there is a considerable need for mediators, agencies and networks offering support services and bringing the actors together. Also the interviewed experts in the Northern Dimension area pointed to the great number of free-lance type employees, lack of business and entrepreneurial skills and lack of understanding of "*terms like business plan or sales output*" as hindrances to CCI business development. In addition, in some cases the "*commercialization skills of ideas are weak*" (LV1).

It has largely been acknowledged that the arts education needs to pay attention also to entrepreneurial and business aspects. Furthermore, there is increasing discussion emphasizing cross-sectorial aspects, e.g. combining engineering or business studies with creativity. However, in practice, it seems that a lot remains to be done in the field of education to meet the needs of the present day reality as highlighted by the interview quotes below. Due to the incomplete match between the supply of skills and the

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[35] Council of Europe / ERICarts (2012). Country profile. Sweden. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

demands of the labor market, it is difficult for companies in the CCIs, in particular SMEs, to find staff with the right mix of skills. Similarly, it is difficult for the companies in other sectors to see the value of CCIs and work with people from the CCIs to improve their competitiveness.

> ”*Higher arts education is still strongly focused on traditional arts training, i.e. for “traditional professions” which there are few of. Higher arts education should be re-examined from the perspective that artistic and creative competencies are needed increasingly in all sectors of society*” (FI2).
>
> “*There have been some attempts to move the art / creative education more into the business direction, but at the moment it is mostly focused on training for traditional arts and cultural professions and the business side of the education tends to be lacking*” (IS2).
>
> “*We lack a lot of cross-disciplinary lines where business and design meet*” (IS1).
>
> “*The way that the education system prepares culture professionals does not still answer to the needs of new business reality. Biggest two problems that the art education has is first, the lack of joint programs with other areas of life and the second is that you cannot alter creative people into a businessman*” (EST2).
>
> “*Art education should move towards developing entrepreneurship, business skills, as well as creating an eco-system for creative innovation within the schools of higher education*” (LT1).
>
> “*The educational sector does not meet the needs of the creative economy yet*” (DE1).
>
> “*We are training for professions [in arts and culture] without understanding of needs and possibilities in other sectors*” (RU2).

Policy recommendations in the field of educational development have emphasized the interchange between education institutions as well as partnerships between art and design schools/universities and businesses. Stronger partnerships between the CCI sectors, social partners and education and training providers are required. Incubators would be a useful tool to increase academia-industry collaboration and knowledge diffusion. Creative apprenticeships could ease the transition from education to employment and peer coaching could be utilized as a functional educational tool. For the better transfer of knowledge, there is a need for mediators, agencies and networks between arts and businesses.

Financing of CCIs

It is often argued that the current support mechanisms, incentive measures and policies do not adequately suit the needs of CCI companies. Due to the small company size, credit volumes are easily considered as unattractive for commercial banks. Micro-firms usually do not have sufficient collateral to appeal for risk-averse investors. CCIs can also be unattractive investment targets due to untried business model or difficulty of gauging future income flows and assessing the risk of an investment or valuating the IPR. In case of many public or EU funding instruments, commercial success is not allowed. The funding is also often project-based, ignoring the continuity of the business. In general, over-stringent conditions in funding calls, administrative burdens and bureaucracy make applying of the funding too heavy process, particularly for small entrepreneurs.

Difficulties related to funding were referred to also in most of the interviews with CCI experts. In most of the ND countries there are some specifically CCI targeted financing instruments available, but the issue is in many cases related to the access to finance, i.e. the CCI firms' lack of awareness of available funding sources or their capabilities and skills of applying for it. There are also differences between the ND countries in the availability of funding depending on the stage of development, the type of activities or the sector where the CCI firm operates. In terms of funding, the situation seems to be most problematic in Russia, where CCIs currently have relatively few sources of funding available.

It was also often stated that even though the CCIs are eligible to apply for funding from the more general sources and instruments, they rarely receive it because there is a "*lack of knowledge for business operators, banks and for agencies in different levels*" about how "*the [CCI] businesses are built and what the logic is and how they earn their money*" (SE1). Furthermore, the more general support systems are typically built around traditional manufacturing industries or when targeted to foster innovation, they focus on technological innovations based on patents, whereas in CCIs, the innovations and end-products are often immaterial. Thus, there is a need to develop the financing models further, in order for them to better meet the needs of CCIs.

> "*The business model and the area in which CCIs work is not so known [among banks and lending institutions]*" (DE2).
>
> *"Probably the biggest problem is attracting the private investors, not so much of the public investors"* (EST2).

As for funding mechanisms, it is typically recommended that funding instruments provided for CCIs should better recognize their special nature and needs. Also, the access to funding should be easier and less bureaucratic than it often is, particularly for micro-SMEs. Many of the SMEs in the CCI sector could also benefit from the development of programs with small scale financial support (e.g. micro-credits). Further, there should be better synergy and coordination between different public support and financing schemes.

Financial services sector itself needs to be more flexible towards the needs of the CCI. Financial institutions are in need of methods to assess businesses relying on intangible assets. Banks and providers of economic support should have standardized assessment criteria for valuation of immaterial property rights. Special characteristics of the CCIs require new funding solutions, such as crowdfunding, champion investment opportunities guarantees and other risk sharing instruments. Investments of Business Angels and Venture Capital investments should be utilized more.

Intellectual property rights and digitalization

The era of digitalization urges cultural and creative industries to create new earnings logics and legislators to develop the protection and enforcement of immaterial property rights and patents against piracy. Copyright and patent laws need to be updated in order for them to be compatible with the new digital society. Especially from the viewpoint of funding and access to it, better methods and initiatives to assess the value of IPR and intangible assets are needed. This is because the IPR is one of the most valuable, but less exploited assets in business.

Many CCI sectors are challenged because they have to cover the costs of "going digital". This includes the digitization of content, skills development and update of staff qualifications and different issues concerning adequate digital rights management. This challenge concerns especially CCI sectors providing recorded content-based, replicable products or service products (e.g. remote maintenance) which can be distributed via digital channels. These are sectors which might have to create new innovative business models or earnings logics. Driven by the digitalization, new technologies, target groups for products, distribution channels and consumption models are emerging.

Since new technologies and increased globalization are shifting industries from traditional manufacturing towards services and innovation, in the digital economy immaterial value increasingly determines material value when consumers are looking for new experiences. Thus, globalization and digitalization (or "digital shift") are very much inter-connected. Digitalization provides also new opportunities in terms of proliferation of cultural products, business concepts (new value chains, technological opportunities, tools and work methods etc.), cross-sectorial cooperation, and e.g. the dissemination of innovations. It also increases the efficiency of functions and reduces the need to execute them at a specific location.

> *"The matter of digitalization includes also the viewpoint of service businesses, which in turn includes also the great potential for added immaterial value creation"* (FI1).

In many ND countries, questions related to IPR have received increasing attention but the focus areas largely depend on the stage of development of IPR legislation and its execution. For example in Russia, there are still challenges with piracy and execution of IPRs, while in many other countries the focus is on strengthening of the management and more efficient commercial utilization of intellectual property rights.

Fostering growth, competitiveness and internationalization

On the basis of foreign trade statistics, the CCIs in the Northern Dimension area are not very active in foreign trade (see Appendix 1). Germany is in its own category when comparing the volume of exports and imports. Germany exports more than the 10 other countries counted together. However, the share of exports of creative goods of the total exports is quite small in all the 11 countries varying from 0,10 % in Iceland to 2,89 % in Lithuania. The balance between exports and imports is relatively even in most of the countries, except in Russia and in Norway, where imports are 5-6 times larger than exports.

As for the type of goods exported, design, publishing and visual arts are the most important product groups in all ND countries. The share of the top two varies from ca. 60 % to over 90 %. In imports, design products are the largest group one in each ND country, totaling from ca. 50 % to over 70 %. The distribution of total imports between different product groups is more even than in exports.

Promotion of growth, competitiveness and internationalization are typically among the targets of the policy makers in the CCIs. There are indeed sectors, such as gaming and music, which are often already from the very beginning targeting global markets. Also in the case of limited home markets, a company might "*have to start from the global level right away* (EST2)". Internationalization may also be a natural solution to companies that are "*missing technology or competence that they can't find locally*" (DE2). However, some other CCI sectors are much more language- or culture-based (e.g. performing arts) and their products are less transportable or less exportable or more focused on local markets. Furthermore, due to the large number of SMEs and lifestyle entrepreneurs, internationalization or growth are often not in the interests of the companies/entrepreneurs in general. Further, if a CCI sector is very fragmented and "*lacking of united vision*" (FI1) there is no particular push into global markets from the sector as a whole.

Policy recommendations for the CCI sector development emphasize the need for financial support to foster the systematic exploitation of foreign market opportunities by the local and regional CCI SMEs. Here, the support from cluster organizations and effective regional ecosystems can play a crucial role. Many countries within the Northern Dimension area are already providing some kind of support mechanisms to facilitate SME internationalization also within the CCIs despite the fact that the sectors' "*export performance is low*" (LV1). It is generally acknowledged that there is a need for "*more growth companies that would exploit opportunities globally*" (DK2).

From the SMEs point of view, internationalization and growth pose a real challenge. Typically, some kind of adaptation is needed e.g. to the product, marketing or sales arguments whenever a company starts international operations. In the CCIs, where products or services are often intangible and the entrepreneurs' business skills may be lacking, the adaptation needed may turn out to be too challenging. Also the earnings logic that works in the home market may require considerable re-thinking to work in the international markets. Thus, the entry to new markets requires human and financial resources as well as international partners and contacts which many companies in the CCIs are lacking. The interviewees remarked that there is a "*lack of studies of CCIs' potential and competitiveness internationally*" and there is "*too little information about foreign markets for CCIs*" (LT1). In order to reduce the risks of internationalization, it is necessary to provide the CCI firms with access to market knowhow, business development support, partners and finance. In addition, CCI professionals tend to be operating in small agencies, a fact which can be a hindrance to operating in international markets. Joining forces pays off.

Furthermore, internationalization of CCIs does not always mean traditional exports or foreign investments but can take also various other forms ranging from international projects or non-commercial cooperation to international co-production or co-creation which can take place also virtually. Concomitantly, this means that internationalization can take place at any stage of the value chain. Thus, the traditional export promotion support does not suit the needs of the CCIs, but the needs arising from these differing forms of internationalization need to be taken into consideration when drafting policies supporting CCI internationalization.

> *"If you create computer games, you wouldn't use the traditional model of export. You wouldn't first sell it to Germany and then to Spain. If you publish a digital game, you are worldwide at once"* (SE1).

Also the value chains within the CCIs are variable. They are often initiated for the realization of a certain project and may dissolve after it is completed. Due to the small size of the companies and large number of freelancers in CCIs, it is typical that several partners are cooperating when carrying out projects. These coalitions can take various forms and they are often temporary by nature.

Cross-sector cooperation

Recently, the role of CCIs in fostering innovation in other sectors has received increasing attention, also within the Northern Dimension area. The competitiveness of other sectors can be increased by applying the skills, technologies and approaches typical in CCI. This is referred to as cross-sector innovation and it can take place in different formats and in different fields of operation, including for example:

- Innovation processes;
- Product or service development;
- Marketing and communication;
- Management, organization, teamwork and collaboration skills.[36]

Various policy recommendations have been given to broaden and intensify the spill-over effects from CCIs to other sectors. SMEs could be supported to make purchases (e.g. creative services) from CCI sector companies with creative vouchers (e.g. Creative Credits). The role of CCIs in the economy could be intensified by creating production linkages between the creative industries and other sectors of the knowledge economy. There should also be more cross-sector partnerships and cooperation between creative professionals. Private-public initiatives could be used to support artist-led experimentation and innovation. The operating environment of enterprises should be innovation-friendly and the network of 'intermediate institutions' should be coherent and extensive. Cross-sectorial innovation could be stimulated with public-private innovation challenges, multidisciplinary teams or creativity competitions. Cluster organizations can be a form of innovation support, a gateway to knowledge and finance, and close the gap between creative SMEs and the mainstream infrastructures for business support. Also joint co-working and multidisciplinary spaces, environments and interactions between different artistic and creative disciplines, sectors, economic fields and points in the production chain and between other industry sectors are needed.

In most of the ND countries the cooperation between CCIs and other sectors of economy has been acknowledged in various strategy and policy papers as an area of further development. In addition, the role of design in promoting growth, productivity and innovation both in private and public sectors is specifically addressed at least in Finland, Denmark and Latvia.

Also many of the interviewees raised this issue, calling for more innovation performance, which would "*combine the CCIs, business and technological sector*" (LV1) and "*development of innovation culture and cross-sectoral thinking in the CCIs*" (LT1).

> *"Probably the lack of cooperation, lack of clusters … there is quite limited amount of spill-overs … cross-overs from culture sectors to other sectors. So probably quite a lack of awareness in other sectors to know what the potential of involving … kind of using the cultural and creative input"* (EST2)

There are also multiple examples of existing concrete means of support within the ND area targeted to foster cross-sector product and service development. In Finland, CreMA grants have been directed for

[36] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.

innovative cross-sector product- and service development projects. In Iceland, there was a pan-Nordic project 13AL+, which brought together Icelandic designers and Swedish aluminum manufacturers. In Estonia, designers, engineers, business and marketing managers have been brought together in TeamLabs to develop new products. In Germany, the KMU-Kreativ initiative promotes cross-industrial cooperation between CCIs and SMEs.[37]

In the following section, we will discuss the CCI policy development and its focus areas in the 11 Northern Dimension countries.

[37] See more information about these examples from Creative Cases presented in section 5 of this report.

4. COUNTRY DESCRIPTIONS OF CULTURAL AND CREATIVE INDUSTRIES WITHIN THE NORTHERN DIMENSION AREA

This section briefly describes the field of Cultural and Creative Industry (CCI) in each country within the Northern Dimension area. We will give a short description about the governmental decision making concerning the CCI sector, outline the funding and financing for the CCIs, have an outlook on the educational operators and issues, and give a brief overview of the CCI sector operators. The purpose is not to map or list each and every operator, but to give a view on what kind of operators there currently are. Furthermore, operators that have international orientation in their activities are emphasized. In addition, the national strategies, policies, programmes and action plans concerning the development of the CCI sector are briefly presented. Each country section concludes with a presentation of selected “creative cases” that could provide some learning points for CCI sector operators and policy makers at national, regional and local levels within the NDPC region.

Finland

In 2012, the economic contribution of the CCIs measured by the gross value added was 5,49 billion EUR, and the culture sector's share of the total gross value added was 3,2 % in Finland. The culture sector's share of total employment was 4,1 %[38]. The export of creative goods was 0,77 % of the total export and 0,31 % of the total GDP in 2012[39]. In addition, the share of CCI sector companies of all businesses was 3,7 % in 2012[40].

The Ministry of Education and Culture, particularly its Department of Culture and Sports and Youth policies, has a wide responsibility over the creative industry policies in Finland and has the central cultural competence. The administration of copyrights is also under the control of the Ministry of Education and Culture. Also, the Ministry of Employment and Economy is involved with CCIs, particularly in the development of the general business operating environment and the creation of ecosystem of the national economy and entrepreneurship development[41] [42]. As for the international business affairs of enterprises in general, the Ministry for Foreign Affairs is providing services supporting the internationalization efforts of companies, export promotion and support for foreign investment[43]. This is done through the Team Finland network, which involves e.g. Finnvera, Tekes, Finnish Industrial Fund, Centre for Economic Development, Transport and the Environment, and the Ministry of Employment and Economy [44].

The Finnish Government (Council of State) and its committees are the main and sole general inter-ministerial and inter-sectoral coordinators. Otherwise inter-sectoral cooperation takes place in ad hoc government committees and working or steering groups set up to address specific issues or to plan reforms or to lead development projects[45]. According to an interviewed expert, the Ministry-level cooperation between the Ministry of Employment and Economy and Ministry of Education and Culture "*is working very well. There has been cooperation for a very long time. There are both official and unofficial working groups*" (FI1).

Cultural and creative industry related education in Finland is provided by several universities. The University of Arts (Helsinki) is the only one focusing solely in arts and cultural education while others provide arts disciplines in addition to other studies. There are also universities that have faculties of Arts (e.g. University of Helsinki). Aalto University is a combination of arts, business and technology. In addition, there are several Polytechnics (in total of ca. 30), of which none is "purely art", but many of them have instead special programmes for the arts, arts management, media and humanities etc. According to the interviewees, thus far, the value of arts, creativity and creative thinking has not been fully understood in education sector. The viewpoint of creativity should be "*connected with other fields of knowhow, in a way which feeds the individual problem solving and regeneration*" (FI1).

---

[38] Tilastokeskus (2014). Kulttuurin satelliittitilinpito. http://193.166.171.75/database/StatFin/kan/klts/klts_fi.asp
[39] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[40] Työ-ja elinkeinoministeriö (2014). Näkemyksestä menestystä. Toimialaraportit.7/2014. http://www.temtoimialapalvelu.fi/files/2287/Luovat_alat_joulukuu_2014.pdf
[41] Ministry of Education and Culture (2014). The Ministry and administrative sector. http://www.minedu.fi/OPM/Ministerioe_ja_hallinnonala/index.html?lang=en
[42] The Ministry of Employment and the Economy (2014). Ministry. https://www.tem.fi/en/ministry
[43] The Ministry for Foreign Affairs of Finland (2013). Team Finland. http://www.formin.fi/public/default.aspx?nodeid=47099&contentlan=2&culture=en-US
[44] Prime Minister's Office. Team Finland (2014). Services for internationalising companies. http://services.team.finland.fi/
[45] Council of Europe / ERICarts (2011). Public Bodies Responsible for National Cultural Policy Development. http://www.culturalpolicies.net

"*We still train artists and cultural actors too much for "traditional" art jobs, which there are few of now, and even fewer in the future. We need to train more arts & cultural actors who are capable of applying their creative competencies in new contexts*" (FI2).

"*The role of art and culture should be re-examined. There are also attitudes that prevent this from happening, in other words applied art is often considered for those who don't make it as 'real' artists*. (…) *There is also a lack of entrepreneurial and business skills, which are barely – if at all – taught in most art universities.* (FI2).

As for the business support organizations, the Centre for Economic Development, Transport and the Environment is a governmental organization providing development services, financial, informational and other support measures for enterprises and entrepreneurs in general and it operates throughout the country in several offices. It also supports the employment and operational preconditions of the creative professionals, entrepreneurship and establishment of the SMEs, and the creative industry in general. In addition, it promotes favorable preconditions for the production of the cultural services[46].

Practically almost each sub-sector in the creative industry in Finland has its own sector-specific support organization. Their service provision varies from financial, informational, educational or promotional support services to networking, lobbying, supervision of the interests of members, development of cultural content, facilitation of the sales and marketing, standing for the expertise of the profession or raising of the general awareness and appreciation for the sector[47].

There are also horizontal level actors addressing different stakeholders. Creative Industries Finland provides information, services and networking for creative industry developers, policy makers and key interest groups[48]. Other support organizations aim to develop creative SME entrepreneurs' businesses and to offer advisory services, consultation and mentoring (e.g. Diges) or to offer hands-on support to international growth planning and market entry and to facilitate networking and shared learning between different creative industry companies (e.g. Luovimo). In addition, the Finnish Cultural Foundation promotes art, science, and other fields of intellectual and cultural endeavor in Finland[49]. The IPR management services and copyright owners representation is provided by several organizations in Finland, of which Kopiosto is having the widest member base.

The large number of different interest organizations can be both a negative and a positive factor. The weakness is that the actions cannot be "*channelled through some specific operators*". It is also a strength, because, due to the number of operators, "*the environment is very rich and diverse*" (FI1). If there were only one or few interest organization(s) with very powerful position both nationally and in cooperation with neighbouring countries, "*this may shrivel other organizations in the field*" (FI1).

"*Instead of having one powerful support organization, we have discussed about creating of one strong brand under which most of the operators could act and do their work. And I think that this is the direction, where we are aiming at in the future*" (FI1).

[46] Elinkeino-, liikenne- ja ympäristökeskus (2015). Luova talous ja kulttuuriyrittäjyys. http://www.ely-keskus.fi/web/ely/luova-talous-ja-kulttuuriyrittajyys#.VMogaLE8JaQ
[47] Source: Internet pages of the organizations.
[48] Creative Industries Finland (2015). Creative Industries Finland. http://www.creativeindustries.fi/cif
[49] The Finnish Cultural Foundation (2014). https://www.skr.fi/en.

> "*An increasing number of innovations occurs in networks between SMEs, where CCIs play a growing role. We need platforms to support fast, network-based innovation activities and hence business services that support and accelerate these types of activities*" (FI2).

Financial support or funding for entrepreneurs is provided by many state-funded institutions, such as Finnvera, TEKES and Finnish Innovation Fund (SITRA). However, according to an interviewed expert, "*for instance the Finnish Innovation Fund is still directed towards supporting traditional industries and innovation is still linked strongly to high-technology*" (FI2).

Individual artists, creative workers and project groups can apply for grants for individuals or working groups, awards, scholarships, subsidies for collective bodies and support to professional artists associations or unions[50]. These subsidies are admitted by e.g. Art Councils. In addition, Ministry of Education and Culture awards government subsidies for product development of cultural content and services, and support to development projects related to the creative industries and cultural enterprises through Digidemo and Creademo funding mechanisms[51]. Both of these funding mechanisms were considered as "*light, non-bureaucratic instruments that are well suitable for the needs of small CCI actors*" (FI2). Also, the Arts Promotion Centre acts under the Ministry of Education and Culture supporting the arts and culture on both national and international levels and promoting aspects of culture that are not covered by any other official body, but not the creative industry as such[52].

> "*Funding instruments are often unsuited for small CI actors and creative entrepreneurs. There is a lack of explicit funds for CCIs and funding doesn't always meet the needs of small actors and enterprises*" (FI2).

As for the use of public funding instruments in creative industries, the Finnish Ministry of Employment and Economy notes in its report that there are still four major bottlenecks, which have not yet been resolved. First, the targeting, development and effectiveness of the public funding has been affected by the very definition of the creative industries and great differences between its sub-sectors. Second, there is a lack of flexible project-based funding for product development, conceptualization and piloting activities intended for the early stages of a company. Third, amongst the funding organizations, there is not enough competency and methods to determine the value of the IPRs. Finally, the business competence in companies in the creative industries and awareness over the funding options available should be improved further.

In general, the report concludes that there has been positive development in public funding for CCIs, both in terms of new funding methods and amount of funding available. However, this development concerns especially CCI sectors, which are based on replicable products. The funding instruments are not in lack of supply, but rather in need of development in terms of their applicability and usefulness. In addition, the synergy between different instruments and awareness about funding and the CCI firms' capabilities to apply for it should be improved. In order to ease the CCIs access to funding, support is needed especially when entrepreneurs and artists are applying for the funding. The amount and extent of information required by the financer is often a challenge, especially for an individual creative worker, who often lacks

[50] Council of Europe / ERICarts (2013). Country profile. Finland. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[51] The Promotion Centre for Audiovisual Culture (AVEK) (2013). AVEK Subsidies. http://www.kopiosto.fi/avek/en_GB/avek_subsidies/
[52] The Arts Promotion Centre Finland (2014). About us. http://www.taike.fi/en/about-us.

the skills needed in e.g. compiling the business plan, and commercialization of product / service ideas or concepts[53].

New funding models, such as crowdfunding and investing in product (instead in company) are well suitable for many creative industry sectors and they should be developed further. However, the Finnish legislation sets quite limited frames for fund-raising campaigns initiated by private operators or persons. In Finland, the legislation does not currently support for example the so called creative vouchers. Also crowdfunding requires supportive legislation in order to be functional (FI1).

[53] Työ- ja elinkeinoministeriö (2013). Julkinen rahoitus luovien alojen yrityksissä. Työ- ja elinkeinoministeriön julkaisuja. Innovaatio, 26/2013. https://www.tem.fi/ajankohtaista/julkaisut/innovaatio/vuosi_2013

Table 1: Key organizations and networks in Finland in CCI [54]

<table>
<tr><th>GENERAL BUSINESS SERVICES</th><th>COPYRIGHT ORGANIZATIONS</th></tr>
<tr><td>Centre for Economic Development, Transport and the Environment (ELY-Centre);
Employment and economic development service office (TE-Office);
FINPRO;
Aalto Start-Up Center (e.g. Arabus business accelerator for CI companies);
Creve (Creative Venture) (incubator for creative sector);</td><td>Gramex ry.;
Kopiosto ry;
Kuvasto ry;
Teosto ry;
Tuotos ry;</td></tr>
<tr><th>FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES</th><th>EDUCATION AND RESEARCH</th></tr>
<tr><td>Credemo and Digidemo (MEC's subsidies);
CreMa (MEC's funding programme);
Finnish Funding Agency for Innovation (TEKES);
Finnish Innovation Fund (SITRA);
Finnish Cultural Foundation (private);
Finnvera;
Art Form Councils and Regional Arts Councils;</td><td rowspan="3">Aalto University;
Tampere University of Technology;
University of Helsinki;
University of Joensuu;
University of Jyväskylä;
University of Lapland;
University of Oulu;
University of Tampere;
University of the Arts Helsinki;
University of Turku;
Centria UAS;
HUMAK UAS;
Jyväskylä UAS;
Karelia UAS;
Kymenlaakso UAS;
Lahti UAS;
Lapland UAS;
Metropolia UAS;
Oulu UAS;
Saimaa UAS;
Tampere UAS;
Turku UAS;

Cupore (cultural policy research organization);
Brahea Development (University of Turku) (research on innovation, entrepreneurship, creative industries, media, innovation ecosystems)</td></tr>
<tr><th>INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)</th></tr>
<tr><td>Arts Promotion Centre Finland (Ministry of Education and Culture);
Luovimo (FINPRO's program);
Creative Industries Finland CIF (information, services, networking);
Promotion Centre for Audiovisual Culture (AVEK);
Diges ry. (national association for development of CCIs);</td></tr>
<tr><th>INTEREST ORGANIZATIONS (SECTOR SPECIFIC)</th><th>OTHER</th></tr>
<tr><td>Artists' Association of Finland;
Association of Finnish Architects' Offices (ATL);
Association of Finnish Sculptors;
Association of independent producers in Finland (SATU ry.);
Association of Visual Communication Designers in Finland (GRAFIA);
Central Organisation of Finnish Film Producers
Dance Info Finland;
Finnanimation ry;
Finnish Antique Dealers Association (FADA);
Finnish Association of Designers (ORNAMO);
Finnish Association of Marketing Communication Agencies (MTL);
Finnish Book Publishers Association;
Finnish Crafts Organization (Taito Group);
Finnish Film & Audiovisual Export (FAVEX);
Finnish Film Foundation (SES);
Finnish Literature Exchange (FILI);
Finnish Society of Composers and Lyricists (ELVIS ry.);
Music Finland;
Neogames;
Trade Union for Theatre and Media Finland (STTL)
Union of Finnish Art Associations
Union of Finnish Writers</td><td>Creative Industries Management (fund, finance and research)</td></tr>
</table>

[54] Hermia Oy (2010). Fact Sheets. Luovat alat. Tampere, Finland.

National strategies, policies, programmes, action plans and initiatives

- Government Resolution on a policy programme on intangible value creation
- Generating growth and renewal from creativity – public measures and development guidelines for the creative economy
- National Design Programme
- National strategy concerning intellectual property rights (IPR strategy)

According to the report by the Nordic Innovation Centre[55], Finland has a strong track record in policy support for the Creative Industries and a clear commitment to innovation and creativity. Earlier CCI strategies (e.g. Development Strategy for Entrepreneurship in the Creative Industries Sector for 2015) focused on the development of the operating environment, growth and internationalization, product development, and reinforcement of expertise within the CCIs[56]. Currently, there are governmental level policies dealing with e.g. intangible value creation, creative entrepreneurship, design and intellectual property rights. Main initiatives are based on the Government Resolution on intangible value creation, creative industries and design in the Finnish economy[57] [58].

The Government Resolution (by the Ministry of Employment and Economy) on a policy programme on intangible value creation is an integral part of the national innovation policy showing that the topic is "*quite high on the government agenda*" (FI2). However, despite the policy programme on intangible value creation is the "*head of the Finnish innovation policy*", it has not yet been adopted by the regional decision-making network "*as well as it should be*" (FI1).

The memorandum on Generating growth and renewal from creativity has five main strategic guidelines. First is the development of a business operating environment based on intellectual property rights and investing in them. Second is the development of skills required by the creative industries. Third one is the development of entrepreneurship and the business sector. Fourth is the control of business development services and interaction with the creative economy sector. Fifth is the improvement of the knowledge base concerning the nature and operational environment of the creative industries[59].

The core vision of the National Design Programme is that by 2020, design has made the growth of well-being possible and it has become a part of the core competencies of enterprises and the public sector. This is to be accomplished by addressing four strategic objectives. First, the foundation for design competence is strengthened through education and research. Second, the design programme promotes design ecosystem dynamics to balance the demand and supply of design competence. Third, design should be utilized effectively by important growth sectors. And finally, design competence and its utilization in the public sector are to be promoted[60].

[55] Nordic Innovation Centre (2007). A Creative Economy Green Paper for the Nordic region.
[56] Ministry of Trade and Industry (2007). Development strategy for entrepreneurship in the creative industries sector for 2015. MTI Publications 10/2007.
[57] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.
[58] Ministry of Employment and Economy (2014). Government Resolution on a policy programme on intangible value creation.
[59] Työ- ja elinkeinoministeriö (2012). Luovuudesta kasvua ja uudistumista. Luovaa taloutta edistävät julkiset toimet ja kehittämislinjaukset. Työ- ja elinkeinoministeriön julkaisija. Innovaatio. 40/2012.
[60] Ministry of Employment and Economy (2013).National Design Programme. Proposals for Strategy and Actions. Markprint. Lahti, Finland.

The IPR strategy emphasizes the need for an IPR-operating environment that supports innovativeness and creative work, which in turn must both be supported by legislation. Immaterial value will be utilized globally. Target areas of the strategy are knowledge, effectiveness and clarity of IPRs, competition policy, functional markets for IPRs, effectiveness of the IPR-management system and international networking[61].

As for the development of the CCI sector, the top issues at the moment are "*creation of ecosystems, increasing the visibility of CCIs and increase of awareness among the entire business environment*" (FI1). The overall approach towards the CCIs in Finland has moved from field of operation -perspective to "*approach of intangible value creation, where creativity is viewed as a competence and how it is utilized in the business*" (FI1).

[61] Valtioneuvosto (2014). Valtioneuvoston periaatepäätös aineettomia oikeuksia koskevasta strategiasta. Liite 2.

Creative cases

CreMA is a flexible grant directed for innovative cross-sector product- and service development projects. CreMA is targeted to projects of creative industry knowhow for the use of other industries or where the creative industries can gain business knowledge from other industries. The aim is also to develop cross-sector cooperation and business models. CreMA is funded by the Ministry of Education and Culture[62].

Demola is an innovation platform bringing together university students and companies to facilitate co-creation and collaboration in international networks[63]. The concept is based on cross-sectoral co-creation where multidisciplinary student teams work on real life challenges initiated by companies. Demola operates as a non-profit organization. The Demola Network has centres in Finland, Lithuania, Hungary, Sweden, Slovenia, Latvia, Russian Federation and Basque country. Originally, Demola was initiated by the Creative Tampere development project and has since operated independently[64].

Creademo and **Digidemo** (awarded by the Promotion Centre for Audiovisual Culture AVEK, funded by the Ministry of Education and Culture) are government subsidies. Creademo is targeted for CCI entrepreneurs or professionals, who are developing new product or service innovations. Digidemo is directed for the same target group, but it is for the content development projects, in which new forms of presentation or service utilizing digital user interface are explored in the field culture and entertainment. Projects must be innovative and multi-channel, and have a good potential for production[65].

Rikastamo-coaching concept aims to bring together the knowledge and skills of CCIs and other sectors. It is directed for e.g. companies, who are developing further their services or products or creating new ones, and who are in need of multi-sectoral networks and partners. Rikastamo is operated by the Ministry of Employment and the Economy[66].

Luovimo is an international growth programme for creative industry companies that focus on innovative service and content business. The programme supports e.g. international growth planning, market entry and networking. It is focused on music, film, tv and audiovisual, performing arts, design and game related industries. The programme offers company-specific consulting and shared learning programs. Luovimo is operated by Finpro[67].

Luovamo was a project (ended in 2014), maintaining an information and career service centre, specialized in servicing creative industry employees and applicants, raising awareness of CCI among employers and creating networks between businesses and creative talents. Luovamo was operated by the Centre for Economic Development, Transport and the Environment[68].

http://www.kopiosto.fi/avek/tuen_hakeminen/fi_FI/CreMA/
http://www.demola.net/about
http://www.kopiosto.fi/avek/tuen_hakeminen/digidemo/fi_FI/digidemo_yleista/
http://www.luovasuomi.fi/verkosto/luovienalojenverkosto/rikastamo
http://www.exportfinland.fi/web/eng/luovimo
http://luovamo.fi/luovamo

[62] Audiovisuaalisen kulttuurin edistämiskeskus AVEK (2013). Tuen hakeminen / CreMA. http://www.kopiosto.fi/avek/tuen_hakeminen/fi_FI/CreMA/
[63] Demola (2015). Demola's mission. http://www.demola.net/about
[64] European Creative Industries Alliance (2014). Create, innovate, grow. A new policy agenda to maximise the innovative contributions of Europe's creative industries. Recommendations from the Policy Learning Platform of the European Creative Industries Alliance.
[65] Audiovisuaalisen kulttuurin edistämiskeskus AVEK (2013). Tuen hakeminen. http://www.kopiosto.fi/avek/tuen_hakeminen/fi_FI/tuen_hakeminen/
[66] Luova Suomi (2015). Rikastamo – tehovalmennusta yrittäjille. http://www.luovasuomi.fi/verkosto/luovienalojenverkosto/rikastamo
[67] Export Finland (2015). Luovimo. http://www.exportfinland.fi/web/eng/luovimo
[68] Luovamo (2014). Luovamo. http://luovamo.fi/luovamo

Sweden

In Sweden, the copyright-intensive industries' contribution to the national GDP was 5,4 % and their contribution to the total employment was 5,3 % in 2010[69]. The export of creative goods was 1,7 % of the total export and 0,82 % of the total GDP in 2012[70].

In terms of governmental remit, the Ministry of Culture is responsible for e.g. the arts, cultural heritage, media and design. The Swedish Arts Council operates under the Ministry of Culture and implements the national cultural policy. The Ministry of Education and Research is responsible for the arts and cultural education. Ministry of Enterprise, Energy and Communications is cooperating with the Ministry of Culture on issues related to creative industry. The Ministry of Enterprise, Energy and Communications in a way holds the main responsibility, because it deals with the general enterprise development. The Ministry of Culture and Ministry of Enterprise, Energy and Communications have cooperation also in the form of an Inter-ministerial Council for Cultural and Creative Industries. The council supports the government's work with the national work plan on cultural and creative industries and initiatives. In addition, it stimulates a broader discussion on culture and creativity (SE1)[71].

Higher arts and culture related education is provided by government funded universities and university colleges. For example in the area of Stockholm there are 7 university colleges providing artistic education. In addition, design and media related education is provided in most universities and university colleges in Sweden[72]. However, "*there is still a gap between education and entrepreneurship area, because the CC educations are measured with very old parameters*". According to an interviewee, more emphasis should be put on topics such as "*how to start your own business* and how to run an enterprise in general, i.e. *how to make your own money*" (SE1).

As for the support for companies, the Swedish Agency for Economic and Regional Growth (Tillväxtverket) is a national authority aiming to promote sustainable industrial development and regional growth, to strengthen the companies' competitiveness and implementing the EU Structural Fund programs[73]. It is running e.g. a program that aims to support the development of the CCI sector by facilitating the dialogue and cooperation between organizations, authorities, business advisors and industry associations. In addition, this program aims to increase awareness of the IPRs, to obtain official statistics on CCIs, and to develop the methods of information, support and funding targeted to culture-based entrepreneurship[74]. Internationalization of Swedish companies is supported by the Business Sweden that also facilitates foreign actors' investments in Sweden. Creative industries is one of the 8 industry focuses of the Business Sweden and it offers skills enhancement initiatives and international ventures. The Business Sweden focuses on computer games, film, music, fashion, design, marketing communication and literature[75].

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[69] Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment
[70] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[71] Council of Europe / ERICarts (2012). Country profile. Sweden. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[72] Council of Europe / ERICarts (2012). Country profile. Sweden. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[73] Tillväxtverket (2015). Vårt uppdrag. http://www.tillvaxtverket.se/huvudmeny/omtillvaxtverket/vartuppdrag.4.727874b114bb71d3df18a234.html
[74] Tillväxtverket (2014). Om programmet. http://www.tillvaxtverket.se/huvudmeny/insatserfortillvaxt/naringslivsutveckling/kulturellaochkreativanaringar/omprogrammet.4.48a604441429f3886202409.html
[75] Business Sweden (2015). Creative industries. http://www.business-sweden.se/en/Trade/Industry-Focus/Creative-Industries/

The operational field of the horizontal CCI support organizations varies from grant-giving to e.g. support of artists, promotion of interest of particular creative industry sectors and promotion of cultural exchange and development of interaction between contemporary art and public spaces.

Sweden has a large number of CCI sub-sector specific organizations, aiming to support the interests, rights and businesses of the creative actors and companies. Their activities include e.g. copyright protection, networking, funding and grant-giving and awareness-raising. Some of these organizations operate also as trade unions, international co-operation platforms or as an umbrella organizations for smaller operators.

Funding for CCIs is awarded or granted by many different institutions, of which some are having special interests towards CCIs. According to the interviewed expert, there is however not enough funding available for the CCIs. There is a need of e.g. micro-credit systems or production funds, from which CCIs could "*loan money and then pay it back later*" (SE1). In addition, it would be useful to develop some kind of "*encouragements to banks to reduce the risks associated with this type of businesses*" (SE1).

> "*One of the main challenges is that to support the CCIs you have to develop far more collaboration and a new system between different political operators. And this is also the reasons why adequate funding is lacking … because the cultural side gives funding to cultural development and so on. So there are different political goals that need to be over-bridged in order to solve this funding situation*" (SE1).

As for the financial support mechanisms, there has been a test in which vouchers (or micro-credits) were given to CCI companies, for creating new service models. This program "*gave a very good pay-off*" for participants, who had had difficulties to get financing from traditional sources. This is because "*they are building on ideas*" (SE1), and there usually are not adequate securities for example a bank loan.

Table 2: Key organizations and networks in Sweden in CCI[76] [77] [78] [79] [80] [81] [82]

GENERAL BUSINESS SERVICES	**COPYRIGHT ORGANIZATIONS**
Swedish Agency for Economic and Regional Growth (Tillväxtverket); Business Sweden (managed by Swedish Trade & Invest Council) (public-private partnership; promotion of Swedish companies abroad and investment opportunities in Sweden); Krenova (incubator, education, networking); Transit Kulturincubator (coaching, business consulting, etc.)	Copyswede; Swedish Performing Right Society;
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
Backstage AB; Creandum; Industri Fonden; SEB Venture Capital; Swedish Authors' Fund; Swedish Visual Artists Fund; Swedish Arts Grants Committee (Konstnärsnämden) (government agency; grants, allowances, cultural exchange; supports visual art, design, music, dance, theatre, film); **INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)** Swedish Artists' National Organization / Association of Swedish Craftsmen and Industrial Designers (KRO/KIF Konstnären); Swedish Joint Committee for Artistic and Literary Profession KLYS (umbrella organization for 18 artist organizations);	National Academy of Mime and Acting; Royal College of Music; Royal University College of Fine Arts; University College of Arts, Crafts and Design; University College of Dance; University College of Film, Radio, Television and Theatre (Dramatiska institutet); University College of Opera; Stockholm University of the Arts; Royal Institute of Art; Konstfack; Volante Research (research-based consultancy)
INTEREST ORGANIZATIONS (SECTOR SPECIFIC)	**OTHER**
National Handicraft Council; Association of Swedish illustrators and graphic designers; Association of Swedish Professional Photographers; Danscentrum; Export Music Sweden; Swedish Association of Architects; Swedish Society of Craft and Design (Svensk Form); Swedish Federation of Professional Musicians; Swedish Film & TV Producers Association; Swedish Film Institute; Swedish Society of Crafts and Design; Swedish Union for Performing Arts and Film; Swedish Union of Journalists; Swedish Writers' Union; Swedish playwrights' Union Society of Swedish Composers; Swedish Society of Songwriters, Composers and Authors; Swedish Musicians Union; Teatercentrum; Writers Guild of Sweden	Swedish Institute (promotion of Sweden); ALMI Företagspartner AB (advisory, loans, VC, incubation); National Public Arts Council; Swedish Governmental Agency for Innovation Systems (VINNOVA) (governmental innovation agency); Generator Sverige (creative sector development network, non-profit organization); Swedish Arts Council (Kulturrädet) (government authority, national culture policy implementation)

[76] Council of Europe / ERICarts (2012). Country profile. Sweden. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[77] Tillväxtverket (2014). Om Tillväxtverket. http://www.tillvaxtverket.se/huvudmeny/omtillvaxtverket/uppdragochorganisation.4.e8f46b8140a162b4fe1b1a.html
[78] Nordic Culture Point (2014). Culture links. http://www.kulturkontaktnord.org/lang-en/nordic-culture/cultural-links/tag?tagId=26
[79] Business Sweden (2014). About Business Sweden. http://www.business-sweden.se/en/about-us/About-Business-Sweden/
[80] http://www.konstnarsnamnden.se, http://www.folkbildning.se, http://nfh.nutek.se/, http://www.statenskonstrad.se/, http://www.svff.se/fondeng.htm, www.sfi.se, http:// www.si.se, www.konstnarsnamnden.se
[81] FAME (2012). A Qualitative Mapping of Available Financing for European Creative Industry SME's.
[82] Swedish Joint Committee for Artistic and Literary Professionals (2012). Member organizations. http://www.klys.se/members.html

National strategies, policies, programmes, action plans and initiatives

- Swedish Innovation Strategy
- National strategy for regional growth and attractiveness 2014-2020

In policy making and development, despite the fact that it is "*broad and it encourages cross-sector innovation and regions to work with the issue, it is not supporting enough the development*" of the CCI sector. There is for example a need of development "*when it comes to finance or export strategies*" (SE1). However, according to an interviewee, "*the main challenge is that they [CCIs] are not currently mentioned in policy documents*" (SE1).

The Innovation Strategy and Regional growth strategy both indeed have very few references on the CCIs. The first mentioned visions Sweden as a "creative country, characterized by pioneering ideas and new ways of thinking and doing". Also, it emphasizes new connections that can be created between different fields of industries and knowledge. The Innovation Strategy presents CCIs as industries of increased importance to the Swedish economy, which contribute to new ways of connecting different industries and fields of knowledge. CCIs also contribute to Sweden's international attractiveness and they are growing rapidly. Furthermore, the CCIs potential to renew industries, i.e. CCIs potential in cross-sector innovation is emphasized[83] [84]. On the other hand, in the regional policy making,

> "*regions of Sweden are in really good level. They know the role of CCIs higher than the state does. For example South Sweden … they have action plans for developing CCIs. They are more forth going than the state is doing at the moment*" (SE1).

The Regional growth strategy refers to CCIs and tourism as examples of areas that can connect industries, skills and knowledge in new ways, in order to create added aesthetic, social and environmental value. CCIs appear often in a global context and they can also contribute to Sweden's international attractiveness. Furthermore, the Regional growth strategy acknowledges CCIs as drivers of a sustainable society and as an area for prosperity and job creation[85] [86]. According to the report by the Center for Cultural and Experience Economy, in Sweden, the 21 regions play a central role in the public focus on the CCIs and their relevance for economic and social development – also in the national level initiatives[87].

In addition to the current ones, in 2009 there was published an Action Plan for the Cultural and Creative Industries by Swedish Government. It was a memorandum which was in force for years 2009-2012. The plan outlined that conditions that enable both entrepreneurs and existing and potential operators in CCIs to develop their business ideas and operations should be created. In addition, it aimed to foster cooperation between culture and enterprises. Also, it was intended to raise the overall awareness of the CCIs[88].

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[83] Ministry of Enterprise, Energy and Communications Sweden (2012).The Swedish Innovation Strategy.
[84] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.
[85] Regeringskansliet (2014). En nationell strategi för regional tillväxt och attraktionskraft 2014–2020. Bilaga till beslut I 10 vid regeringssammanträde den 28 maj 2014, N2014/2502/RT. http://www.regeringen.se/sb/d/2498/a/241663
[86] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.
[87] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.
[88] Ingrid Elam (ed.) (2012). Artists and the Arts Industries. Swedish Arts Grants Committee http://www.culturalentrepreneur.se/dokument/Antologi_2012.pdf

Creative cases

Transit Kulturinkubator aims to contribute to better conditions for CCI professionals to develop their businesses and activities. The incubator provides coaching, consulting, office spaces and access to a network of specialists and industry experts. Services are targeted to CCI operators from the fields of art, design, craft, film, music and performing arts. The incubator is a non-profit organization and it receives subsidies from the Stockholm County Council[89].

Filmregion Stockholm-Mälardalen is a regional film production centre, which aims to stimulate film production in the region and by this way strengthen its visibility and competitiveness. Other goals are e.g. promotion of the region internationally, networking, professional development of the municipalities and the industry and to find new methods for financing of productions. The centre operates in collaboration between public and private sectors. It has been jointly founded by several provinces, municipalities and cities[90].

Ideon Innovation is an innovation centre, providing incubation services open to several fields of business, having sector expertise for example in green and bio-economy, creative, cultural and digital industries, advanced manufacturing and smart mobility. The Ideon has a specialty in start-ups in the cultural sector and the field of water innovations and open innovation with industry. The Ideon Science Park has an initiative for Open innovation, providing a platform for collaboration with corporate clients, external consultancy firms and other operators towards a common goal. At the Science Park, it is possible to develop own and other's product ideas. The service provision of the Ideon Innovation includes business development, office spaces and active support when searching for sources of financing. It has been founded by Lund University, Malmöhus county, Lund municipality and private business operators[91].

DesignTorget is a marketplace for creative products. City of Stockholm has provided part of the old Cultural House for the use of creative professionals, where design products can be sold, and by this way it has supported public demand for CCIs. DesignTorget operates now in Sweden and Norway. DesignTorget is owned by a private holding company[92].

http://www.transitkulturinkubator.se/page.php?department=19
http://www.frsm.se/
http://www.ideoninnovation.se/sv
http://www.designtorget.se/designtorget/se/

[89] Transit Kulturinkubator (2015). About Transit Kulturinkubator. http://www.transitkulturinkubator.se/page.php?department=19
[90] Filmregion Stockholm-Mälardalen (2015). Om Filmregionen. http://www.frsm.se/om-filmregionen/
91 European BIC Network (EBN) (2015). Ideon. Organization profile.
http://ebn.eu/index.php?lnk=Mnk2VjRUbFQ1U0JPbVQrZFN1N1hQRTUrWDdWVU5xMGFmaS9na2lxenpIWT0=
[92] DesignTorget (2015). Ett DesignTorget i förändring. http://www.designtorget.se/designtorget/se/om_oss/

Norway

In Norway, the contribution of culture and creative industries to national GDP (value-added) was 3,2 % in 2003[93]. Employment in cultural sectors as a share of the total employment was 2,6 % in 2009[94]. The export of creative goods was 0,27 % of the total export and 0,11 % of the total GDP in 2012[95].

As for the governmental responsibilities over the CCI sector, the Ministry of Trade and Industry governs all types of businesses, also the cultural industries. The Ministry of Culture incorporates sport and media issues and is "*the main driver of the CCI*" (NO2). The Ministry of Regional Development, together with the Ministry of Trade and Industry and Ministry of Culture, are "*controlling most of the tools*" (NO1).

The Arts Council Norway is administered and financed by the Ministry of Culture. The Arts Council administers the Norwegian Cultural Fund and acts as an advisory body to the central government and public sector on cultural affairs. It is the main governmental operator for the implementation of Norwegian cultural policy. It is in charge of e.g. artists' grants and other funding schemes[96].

The Ministry of Education and Research is in charge of educational policy setting and involved e.g. with administration of the national cultural initiative (see more in Creative Cases; the Cultural Rucksack)[97], together with the Ministry of Culture.

The Innovation Norway is a state-owned company promoting industrial development. The cultural industry is considered as one of its priority areas. The Innovation Norway has various development programs for CCIs (e.g. Mentor Program, Corporate Network Program). The government and the Innovation Norway both have a particular focus on the film, book and music industries[98].

There are many institutions offering higher education in visual arts and music, but fewer offerings in the fields of literature, theatre, dance and film[99]. In addition, it was noted in the interviews, that "*there has been increased interest in having entrepreneurship courses introduced into the arts education*" (NO1). For example, the Oslo National Academy of the Arts has started an entrepreneurship program for former students, called Entrepreneurship in Arts and Design (NO2). Despite this "*fantastic initiative*", entrepreneurship should be much more widely included in the "*curriculum of the education system*", instead of being something that "*you learn after you finish school*" (NO2).

> "*Most of the arts students are unwilling entrepreneurs and need to learn the basics of how to start and run their own company*" (NO2).

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[93] Business in the Community (Arts & Business). Private investments in culture 2007/08
[94] Europen Commission (2011). Cultural statistics. Eurostat pocketbooks
[95] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[96] Arts Council Norway (2015). A short guide to Arts Council Norway. http://www.kulturradet.no/english
[97] The Cultural Rucksack (Den kulturelle skolesekken), is a joint initiative between the Ministry of Culture and the Ministry of Education and Research for professional art and culture in education in Norway, which aims to e.g. help to ensure that pupils in primary, lower secondary schools and high schools are offered a professional arts and culture programme (Compendium, 2011. Norway. Country profile. Council of Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php)
[98] Innovation Norway (2015). About Innovation Norway. http://www.innovasjonnorge.no/no/english/#.VVsaU6PyVaQ
[99] Council of Europe / ERICarts (2011). Country profile. Norway. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

"S*hould it [entrepreneurship] be obligatory part of the education or if it should just be available for those who seek that? There will always be discussion about that*" (NO1).

The field of CCI support and interest organizations is large and they are offering a wide range of services, but particularly many of them are providing services and information related to copyright protection, collective agreements on copying, digital use and compensation rights. The emphasis of the government and Innovation Norway is reflected in the operational fields of the expert bodies and especially in the types of the interest organizations, of which majority are involved exactly with film, book and music industries.

As for the funding instruments and mechanisms, all of them are basically open to any business and therefore for CCIs too but the main issue seems to be, that funding instruments do not acknowledge the specific characteristics of the CCIs.

"*So far we have some programs [for funding], but they are originally made for other types of business. It is very difficult for the CCIs to get funding. We need to evaluate our work so far and see if we need to make totally new funding mechanisms for CCIs*" (NO2).

Table 3: Key organizations and networks in Norway in CCI[100] [101] [102] [103]

GENERAL BUSINESS SERVICES	**COPYRIGHT ORGANIZATIONS**
Innovation Norway (government agency for innovation and development for enterprises and industry); Lillehammer Kunnskapspark (LKP) (incubator for CI companies); Impact Hub Bergen (incubator, etc.);	BONO; GRAMO; Kopinor; NORWAKO; TONO;
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
Alliance Venture; Fjord Invest; Northzone Ventures; Norwegian Film Fund (governmental); Norwegian Gaming and Foundation Authority; Norwegian Cultural Fund; **INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)** Norwegian Association of Art Societies (network of art societies);	Arctic University of Norway; Barratt Due Institute of Music; Bergen Academy of Art and Design; Bergen National Academy; Bergen School of Architecture; Norwegian Business School Norwegian College of Dance; Norwegian Eurythmy College; Oslo National Academy of the Arts; Oslo School of Architecture and Design; University of Agder; etc. University of Bergen; University of Oslo; University of Stavanger; University of Tromsø; Knowledge Centre for the CCI (Lillehammer); BI Norwegian Business School Centre for Creative Industries (BI:CCI);
INTEREST ORGANIZATIONS (SECTOR SPECIFIC)	**OTHER**
Norwegian Film Development (governmental); Norwegian Film Institute (governmental); Association of Norwegian Printmakers; Association of Norwegian Sculptors; Association of Norwegian Theatres and Orchestras; Dance House Norway; Den Norske forfatterforening; Directors guild of Norway; Foundation for Design and Architecture in Norway (Norsk Form); Musik Export Norway AS; National Association of Norwegian Architects; Norwegian Actors' Centre; Norwegian Artists (Norske Billedkunstnere); Norwegian Association for Performing Arts; Norwegian Association of Fine Art Photographers; Norwegian Association of Photographers (Norges Fotografforbund); Norwegian Authors' Union; Norwegian Centre for Design and Architecture; Norwegian Crafts; Norwegian Design Council; Norwegian Film Directors; Norwegian Film Workers Association; Norwegian Literature Abroad (NORLA); Norwegian Musicians' Union (MFO); Norwegian Union of Journalists; Norwegian Writers' Centre	Office for Contemporary Art (OCA) (foundation for developing collaboration projects); Performing Arts Hub Norway (promotion centre for performing arts); Norwegian Media Authority (governmental); Arts Council Norway (governmental implementation of culture policy); Arts & Business Norway (non-profit organization promoting arts and business relations);

[100] Council of Europe / ERICarts (2011). Country profile. Norway. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

[101] Kulturkontakt Nord (2014). Kulturlänkar. Norge. http://www.kulturkontaktnord.org/nordic-culture/cultural-links/index.php?option=com_customproperties&view=show&task=show&Itemid=185&cp_type=alltype&cp_region=norge&submit_search=Search

[102] Study in Norway (2014). List of institutions. http://www.studyinnorway.no/Where-can-I-study/List-of-institutions

[103] FAME (2012). A Qualitative Mapping of Available Financing for European Creative Industry SME's.

National strategies, policies, programmes, action plans and initiatives

- From Entrepreneur to Cultural Business (Fra Gründer til Kulturbedrift)
- Unique ideas, major assets – on intellectual property rights (Unike idear, store verdiar – om immaterielle verdiar og rettar)

The action plan From Entrepreneur to Cultural Business is jointly compiled by three ministries: Ministry of Culture, Ministry of Trade, Industry and Fisheries, and Ministry of Local Government and Modernization. With the action plan, the government aims to develop growth and export in the CCIs, to ensure that more players from the CCIs create sustainable businesses, and to develop attractive local societies and regions for citizens, employment and businesses throughout the country. In addition, the action plan deals with the trends in CCIs, the conditions and methods that can help increase value creation in CCIs, and how the municipalities, cities and regions across the country can invest in culture in order to develop attractive communities for citizens and businesses. The action plan sets three objectives: to support the inherent value of art and culture, to develop the CCIs as an instrument of growth and innovation, and to support the inclusion of culture in regional development[104] [105].

The report Unique ideas, great values outlines the framework for the use of IPRs in Norway, status for handling IPRs, government's policy for intangible values and rights, financial and administrative consequences and illustrates the need for a system that manages IPRs so that there is a balance between the owners of the IPRs and innovation activity[106].

However, according to the interviewees, "*current policies do not support the development of the CCI sector well enough*" (NO2). Even if the current policies would support the CCIs in some measure, there is a challenge because "*people within those instruments and in ministries … do not always have the necessary in-depth knowledge about the sector*" (NO1). In order to make the support mechanisms and policies more functional, more knowledge building and knowledge sharing is needed both towards the CCI operators themselves and for the use of policy makers (NO1).

> "*But it seems to be a challenge that people that are seating in positions of support instruments, they still have job to do learning more about the cultural sector and concrete challenges and needs of the CCI sector*" (NO1).
> In general, the government aims to develop cultural policies, which enable people to participate in and experience a diverse cultural life. Further, the government encourages growth from a bottom-up perspective stimulating dispersal of power and decentralization of decisions[107].

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[104] Kulturdepartementet, Nærings- og handelsdepartementet og Kommunal- og regionaldepartementet (2013). Fra gründer til kulturbedrift. https://www.regjeringen.no/globalassets/upload/kud/samfunn_og_frivillighet/rapporter/fra_grunder_til_kulturbedrift_2013.pdf

[105] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.

[106] Government of Norway. MInistry of Trade, Industry and Fisheries. https://www.regjeringen.no/en/dokumenter/meld.-st.-28-2012-2013/id722822/?docId=STM201220130028000ENGEPIS&ch=1&q= (https://www.regjeringen.no/contentassets/d1b6af2f59b149f9bcaf94924607f5f9/en-gb/pdfs/stm201220130028000engpdfs.pdf)

[107] Center for Cultural and Experience Economy (2014). Mapping of cultural and creative industries, policies and initiatives in the Nordic region, the UK, the Netherlands and the EU. Nordic Lighthouse Project. Culture and Creativity for Growth.

Creative cases

Oslo Region Cultural Industries Network aims to encourage networking and cooperation across all fields of the CCIs in the region. One of the main focuses is on promoting the development of a shared knowledge platform. The network aims to advocate both profit and branding – creativity and growth – by acting as a network architect and driver for cooperation. There is a major focus on promoting the development of a new, shared knowledge platform. Emphasis is placed on giving small cultural businesses the opportunity to be connected in order to develop professionally, and get inspiration and new ideas. The network is currently under development. The Oslo Business Region is owned by the City of Oslo[108].

Cultural Rucksack (Den kulturelle skolesekken) is a national programme for arts and culture provided by professionals in Norwegian schools. It exposes pupils to professional arts and culture, enhances their understanding of the field and gives them new forms of experience. It aims to increase the understanding of art and culture, to provide a new market for the artists and the CCIs and to promote cooperation between the educational sector, the cultural-creative sector and the local authorities. The programme is managed by the Arts Council Norway and it is mainly funded by the Norsk Tipping (a state-owned lottery company)[109].

Oslo Schous Cultural Brewery (Schous kulturbryggeri) provides offices for firms and individuals who are active in the creative industry sector and services to support their collaboration. One of the aims has been to stimulate the establishment of new networks and developing existing ones, and increasing the cooperation between the property developers and the municipality. The Brewery is managed by the Municipality of Oslo[110].

Impact Hub Bergen is a combination of an innovation lab, a business incubator, a membership community and a place for collaboration, meetings and learning. There are office spaces for entrepreneurs and exhibition and event places. In addition, there are various programs, e.g. for initiating multi-disciplinary collaborations, a Social Innovation Camp-program, the Cultural Entrepreneurship Programme, the LearningLab, and training programmes the Business Academy and the Business Help Desk. The Hub is a part of a global network of over 50 Impact Hubs. The Hub has been founded by a private person[111].

Fast results (Raske resultater) for creative industries (by City of Oslo) is a funding scheme, aiming to stimulate the development and growth of the creative communities in Oslo. It provides spaces for exploring and testing new ideas, concepts, methods, and facilitate cooperation. Cultural and food related industries can apply for grants for initiatives and projects that contribute to innovation and creativity in the cultural field and in cultural industries[112].

http://www.oslobusinessregion.no/news/relaunch-oslo-region-cultural-industries-network/
http://www.kulturradet.no/english/the-cultural-rucksack
http://www.schouskulturbryggeri.no/
http://bergen.impacthub.net/
http://www.kulturetaten.oslo.kommune.no/kulturtilskudd/innovasjon/

[108] Oslo Business Region (2015). Relaunch of The Oslo Region Cultural Industries Network http://www.oslobusinessregion.no/news/relaunch-oslo-region-cultural-industries-network/
[109] Kulturrådet (2013). The Cultural Rucksack. http://www.kulturradet.no/english/the-cultural-rucksack
[110] Creative Metropoles (2010). How to support creative industries. Good practices from European cities.
[111] Impact Hub Bergen (2015). About us. http://bergen.impacthub.net/about-us/
[112] Oslo Kommune, Kultureetaten (2014). Tilskudd til innovasjon innen kultur og kulturnæringene. http://www.kulturetaten.oslo.kommune.no/kulturtilskudd/innovasjon/

Denmark

In Denmark, the economic contribution of the copyright-intensive industries' to the GDP was 4,1 % and their share of the total employment was 4,3 % in 2010[113]. The export of creative goods was 2,05 % of the total export and 1,11 % of the total GDP in 2012[114].

The Ministry of Culture holds the executive power for cultural policy initiation, planning and implementation. It supports the art and cultural production through general art funding schemes, emphasizing the quality of arts as the primary reason for support. The Parliament, with final legislative and budgetary power, has the Committee of Culture, which deals with cultural policy issues. The Ministry of Culture contributes to the development of business potential in cultural life in particular through the Center for Culture and Experience Economy (CKO)[115]. The CKO aims to promote the growth of the Danish culture and experience economy by facilitating cooperation between businesses and the cultural and creative sectors, and to strengthen the creative sector's business understanding through strategic collaboration with the business world. The CKO was originally established by the Ministry of Business and Growth and the Ministry of Culture, but is now an independent government funded agency[116] [117].

The Ministry of Business and Growth is responsible for the general business environment, business regulation, IPRs, competition and consumer policies[118]. It operates the Danish Business Authority, which develops and implements a policy for creative businesses and design, prepares analyses, administers initiatives and grants to recipients, and develops new policies through policy recommendations and international efforts[119].

The abovementioned ministries are responsible for different phases of the development of a company. For instance, a game company could in the beginning be supported by the Ministry of Culture, but later by the Ministry of Business and Growth, when it becomes "*real business*" (DK2). It was considered by the interviewees that the general CI development is done mainly by the ministries (Culture; Business and Growth) and the CKO.

The Danish Agency for Culture is a state organization aiming to improve professional synergies, bolster the interplay among different art forms and improve the coordination of national and municipal efforts in cultural fields. It also acts as a secretariat for the Danish Arts Foundation, an organization allocating funding for artists through independent expert committees. In general, the Danish Agency for Culture manages administrative, advisory and implementation tasks for the Ministry of Culture in the following areas: libraries, cultural heritage, the arts, archives, media and film[120] [121].

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[113] Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment

[114] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en

[115] Ministry of Culture Denmark (2015). Creative and cultural businesses. http://kum.dk/servicemenu/english/policy-areas/creative-and-cultural-businesses/

[116] Center for Kultur- og Oplevelsesøkonomi (2014). About CCEE. http://www.cko.dk/about-ccee

[117] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.

[118] Ministry of Business and Growth (2015). About us. http://www.evm.dk/english/about-us

[119] Danish Business Authority (2015). Role of the Authority. http://danishbusinessauthority.dk/creative-industries

[120] Council of Europe / ERICarts (2012). Country profile. Denmark. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

[121] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.

The higher education in the areas of fine arts, classical and rhythmic music, film, theatre and dance is under the responsibility of the Ministry of Culture [122]. The Danish Agency for Higher Education operates under the Ministry of Higher Education and Science, and handles tasks within the overall sector of higher education [123]. The largest institution providing arts related education is the state funded Royal Danish Academy of Fine Arts. In addition, many other higher education institutes provide separate arts studies or programs[124].

> "*You can say that fine arts education is working with these challenges [e.g. entrepreneurship and ICT issues]. It is very high on the agenda. (…) I think that by now we are working with both developing entrepreneurship and developing skills*" (DK1).

> *"There are sort of two types of schools, the kind of traditional art schools and then schools that combine for instance design and business. There are some pretty good ones*" (DK2).

The support and interest organizations, expert bodies etc., are usually independent operators, although some of them are funded by the government (e.g. CKO, Danish Council of Artists, Danish Design Centre). Some of these organizations operate as knowledge centres, while others promote partnership initiation, foster the development of a particular sector, promote international cultural collaboration or act as multidisciplinary organizations of professional artists' organizations[125].

The Ministry of Culture supports the art and cultural production through the general art schemes and it manages the Danish Arts Foundation, which allocates funding for artists. The Ministry of Business and Growth is responsible for general business support. The Vækstfonden (Danish Growth Fund; Danish state's investment fund) is a finance institution, which aims to create new growth companies by providing venture capital and competence. It invests in equity or provides loans and guarantees in collaboration with private partners and Danish financial institutions. In addition, there are several foundations (e.g. Augustinus Foundation; support for cultural activities) and funds (Bikubenfonden; supports for social and cultural projects), which provides funding and financial support.[126] [127] [128]

As for the current support policies, despite that they "*are quite good*" (DK1) there seems to be room for improvements in some measure. Interviewees pointed out that "*there is a need for more targeted acceleration programs*", in which the specific needs of the creative sector has been taken into account (DK2). Furthermore, a large share of the "*business development is based on regional initiatives*" (DK2) and regions are really "*focusing in these [CCI] questions*" (DK1).

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[122] Ministry of Culture Denmark (2015). Education. http://kum.dk/servicemenu/english/policy-areas/education/

[123] Ministry of Higher Education and Science (2013). About the Agency. http://ufm.dk/en/the-minister-and-the-ministry/organisation/danish-agency-for-higher-education/about-the-agency

[124] Council of Europe / ERICarts (2012). Country profile. Denmark. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

[125] The Danish Council of Artists (Dansk Kunstnerråd) is an example of this kind of organization. In the Council there are one or two representatives from each 24 member organization.

[126] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.

[127] Vækstfonden (2015). Objectives and strategy. http://www.vf.dk/om-vaekstfonden/formaal-og-strategi.aspx

[128] CIM Creative Industries Management Ltd. (2012). Mapping of Nordic Creative and Cultural Industries Financial Environment. A KreaNord Report 1/2012.

Table 4: Key organizations and networks in Denmark in CCI[129] [130] [131] [132] [133]

GENERAL BUSINESS SERVICES	COPYRIGHT ORGANIZATIONS
Danish Business Authority (governmental); Invest in Denmark; Spinderihallerne (The Spinning Mill) (incubator, development, network for business, art, design); Incubator Service (Danish Design Centre) (for companies outside DK)	COPYDAN; Gramex; KODA; NCB;
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
Augustinus Foundation; Axcel; Bikubenfonden; Capidea Management ApS; Deltaq; Hanssen Fund A/S; Kirkbi Invest S/A; Nordic Venture Partners; Northzone; SEED Capital Funds; Vaekstfonden (Danish Growth Fund, under the Ministry of Business and Growth); VF Venture;	Aalborg University; Aarhus School of Architecture; Aarhus University; Business Academy Aarhus; Copenhagen Business Academy; Copenhagen Business School; Copenhagen School of Design and Technology; University College of Northern Denmark; Danish School of Media and Journalism; Funen Art Academy; IT University of Copenhagen; Metropolitan University College; Royal Danish Academy of Fine Arts; University of Copenhagen; University of Southern Denmark;
INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)	
Center for Culture and Experience Economy (CKO); Danish Agency for Culture (governmental); Danish Arts Foundation (promotion of the Danish arts)	
INTEREST ORGANIZATIONS (SECTOR SPECIFIC)	**OTHER**
Danish Film Institute (governmental); Danish Design Centre (governmental); Association of Danish Landscape Architects; Association of Danish Scenographers; Danish Actors Association; Danish Architects' Association; Danish Artists Union (Dansk Artist Forbund); Danish Arts and Crafts; Danish Arts Foundation; Danish Author's Society; Danish Composers Society; Danish Conductors Association; Danish Council of Artists; Danish Cultural Institute; Danish Fiction Authors (Danske Skønlitterære Forfattere); Danish Film Directors; Danish Musicians' Union; Danish Songwriters Guild; Danish Union of Journalists; Danish Union of Journalists; Danish Visual Artists; Interactive Denmark (non-profit organization for e.g. games industry, digital learning and e-health);	

[129] Council of Europe / ERICarts (2012). Country profile. Denmark. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[130] Study in Denmark (2014). Find your Study Programme. http://studyindenmark.dk/portal
[131] Dansk Kunstnerråd (2014). Kunstnerrådets medlemsorganisationer. http://www.dansk-kunstnerraad.dk/medlemsorganisationer/
[132] Kulturkontakt Nord (2014). Kulturlänkar. Danmark. http://www.kulturkontaktnord.org/lang-sv/kulturportalen/kulturlankar/tag?tagId=24
[133] FAME (2012). A Qualitative Mapping of Available Financing for European Creative Industry SME's.

National strategies, policies, programmes, action plans and initiatives

- Denmark at Work - Plan for Growth in the Creative Industries and Design
- Danish Architectural Policy - Putting People First
- The Vision of the Danish Design 2020 Committee

The Plan for Growth has the following focus areas for growth in the creative industries and design: to improve business skills and access to financing, to speed up market maturation of new creative products and design solutions, to promote growth in the creative industries with good educational programmes and strong research and to make Denmark as an international growth centre for architecture, fashion and design[134].

The Ministry of Culture has also compiled a specific policy for architecture in Denmark. It outlines that architecture has potential for increased growth and job creation in Denmark. This is because, in addition to fashion and design, architecture is one of the CCI sectors where Danish internationally renowned competences are and where increasing international demand creates increased opportunities for revenue and export. It is the Government's ambition that Danish architecture continues to evolve and define Denmark both at home and internationally. A number of specific initiatives are outlined across different ministerial fields of responsibility[135].

The Vision of the Danish Design 2020 Committee outlines that by 2020 Denmark is known worldwide as the design society, where the use of design has been integrated in to all levels, in order to improve the quality of people's lives, create economic value for businesses, and make the public sector better and more efficient. The Danish government expects design to become an even stronger driver of innovation in the future. The task of the Design 2020 Vision Committee was to present a suggestion how the future use of design, design thinking, and design research can help resolve Denmark's growth, productivity, and innovation challenges[136].

[134] The Danish Government (2013). Denmark at Work Plan for Growth in the Creative Industries and Design. Summary.
[135] The Ministry of Culture (2014). Danish Architectural Policy - Putting People First. http://kum.dk/servicemenu/english/current-themes/architectual-policy/
[136] Danish Business Authority (2011). The Vision of the Danish Design 2020 Committee. http://danishbusinessauthority.dk/file/301679/vision-danish-design-2020.pdf

Creative cases

Creative Business Cup (CBC), was initiated in 2010 by the CKO as a national competition for entrepreneurs in the CCIs. Since then, the CBC has grown into a global competition. In 2014, the CBC had national competitions in 60 countries and the finals were held in Denmark[137]. It is an initiative, network and marketplace supporting CCI entrepreneurs in scaling and growing their businesses. The CBC supports entrepreneurs all-year round and e.g. helps to find financial partners, develop products and create international networks[138].

ArtLab (operated by the Danish Musicians Union and Danish Actors association) offers courses and coaching for professional artists and culturally experienced professionals. The ArtLab aims to foster job creation through education in arts and in arts & business. It focuses on R&D and provides a bridge between education and working life, arts and business and different operators in the field[139].

INVIO network (managed by the Aalborg University) is about promotion of knowledge about the experience economy by knowledge sharing, matchmaking and collaboration between companies and knowledge institutions, and by conducting new research. It brings together companies and knowledge institutions and aims to strengthen the companies' ability to develop and innovate, which will in turn lead to growth and job creation[140].

Interactive Denmark is a national partnership, supported by the Market Development Fund, the Capital Region of Denmark, Central Denmark Region, the North Denmark Region and City of Copenhagen. It supports Danish companies in identifying and accelerating business opportunities and growing internationally. It aims to connect foreign companies and to facilitate investment in Danish game and interactive companies. In addition to games, it is targeted for companies producing digital goods and services in the sectors of education and health care. The partnership consists of the Danish Producers Association, Shareplay (a transmedia venture) and CAPNOVA (an investment and development company)[141].

http://www.cko.dk/en/creative-business-cup-en
http://artlab.dk/fokus/artlab-in-english/
http://invio-net.dk/en/about-invio
http://interactivedenmark.dk/about?language=en

[137] Center for Cultural and Experience Economy (2015). Creative Business Cup. http://www.cko.dk/en/creative-business-cup-en
[138] European Creative Industries Alliance (2014). Create, innovate, grow. A new policy agenda to maximise the innovative contributions of Europe's creative industries. Recommendations from the Policy Learning Platform of the European Creative Industries Alliance.
[139] Artlab (2015). Artlab in English. http://artlab.dk/fokus/artlab-in-english/
[140] InnovatIon network for ExperIence Economy INVIO (2015). About Invio. http://invio-net.dk/en/about-invio
[141] Interactive Denmark (2015). Get in touch. http://interactivedenmark.dk/about?language=en

Iceland

In Iceland, the creative industry's contribution to the economic growth in terms of the share of the total VAT-taxable turnover was 6,36 % in 2009[142]. Employment in cultural sectors as a share of the total employment was 3,2 % in 2009[143]. The export of creative goods was 0,10 % of the total export and 0,06 % of the total GDP in 2012[144].

In terms of governmental distribution of responsibilities over the CCI sector, the Ministry of Education, Science and Culture administers (especially its Department of Cultural Affairs) the arts and heritage sectors and other cultural affairs and policies for culture and arts. Government involvement in the arts focuses primarily on the operation of state-run art institutions and support for professional artists[145]. The music sector receives special attention, since there is a special fund for music sector (from 2004). It was established by Ministry of Education, Science and Culture in order to strengthen the Icelandic music industry and facilitate the promotion of Icelandic musicians and their work[146]. Promotional centres on arts, design and film (IAC, IDC and IFC) are all funded also from the government budget.

The Ministry of Industries and Innovation's authority covers all sectors of the general business and economic activity[147]. It also manages the Innovation Centre Iceland, which aims to increase innovation, productivity and competitiveness of Icelandic businesses[148]. The Ministry of Industries and Innovation is also responsible for CCI policy development and design policy in Iceland (IS2). Shared responsibility between the two ministries over the CCI policies and issues was questioned to some extent by an interviewed expert. It was argued that "*CCI questions need to be in one place, within one ministry*", in order to avoid the "*silo-based governance*" (IS1).

The Iceland Academy of the Arts is the sole university level operator, providing full arts related education and degree programs in Iceland. Other universities have separate arts studies or programs. For example, the University of Iceland (the biggest university in Iceland) has several study programmes in arts[149]. The importance of the music sector is also proved by the number (89) of music schools in Iceland.

Despite that in Iceland "*we have a quite strong design education now*", there is "*a lot to do here to develop*" the art education. There is a need for cross-disciplinary lines "*where business and design meet*" and need for "*support for under-graduates*" (IS1).

> "*There have been some attempts to move the arts education more into the business direction, but at the moment it is mostly focused on training for traditional arts and cultural professions and the business side of the education tends to be lacking. (…) Creative teaching should not be compromised because of demand for business knowledge as people have different skills. However, some basic economic knowledge is necessary if*

[142] Margrét Sigrún Sigurðardóttir &Tómas Young (2011). Towards Creative Iceland: building local, going global. Quantitative and qualitative mapping of the cultural and creative sectors in Iceland.
[143] Europen Commission (2011). Cultural statistics. Eurostat pocketbooks
[144] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[145] Ministry of Education, Science and Culture (2014). The Ministry of Education, Science and Culture. http://eng.menntamalaraduneyti.is/
[146] Margrét Sigrún Sigurðardóttir &Tómas Young (2011). Towards Creative Iceland: building local, going global. Quantitative and qualitative mapping of the cultural and creative sectors in Iceland.
[147] Ministry of Industries and Innovation (2014). New Ministry of Industries and Innovation. http://eng.atvinnuvegaraduneyti.is/ministry/
[148] Ministry of Industries and Innovation (2014). Organizations. http://eng.atvinnuvegaraduneyti.is/ministry/organisations/
[149] Study in Iceland (2014). Higher Education in Iceland. http://www.studyiniceland.is/page/HigherEducationInIceland

the aim is to start a business. Basic creative knowledge can also be considered to be a necessary skill for anyone. So, the creative education should become cross sector throughout the educational system" (IS2).

In the field of support organizations, there are a number of organizations providing support services and funding for the music sector. Also for the film industry, there are many support centres and associations. The Promote Iceland agency (manages also the Invest in Iceland) is a public private partnership and it has a separate department for tourism and creative industries[150].

"*There has been a number of different initiatives in order to boost the business development within the creative industries. Many of the industries' centers hold regularly events which are informative for creative people who are working on their own business within the industry*" (IS2).

There has been discussion about whether there should be only one powerful interest organization covering all the subsectors of the creative industry, like it is the case in Denmark. In addition, even though there are several governmental platforms supporting the CCIs, their attitudes towards the CCIs were considered a bit unclear.

"There was this dream of uniting all these promotional platforms for arts and design into one platform, but that has not come true. *I think that it is one of the problems that within the creative industry people want to put everything in to one place and sort of mix it together and think that it will be easier to manage*" (IS1).

Funding is always a challenge for CCIs. Whether the distributor of the money, such as a governmental body does not have "*the full understanding of the needs of these sectors*" or there are no "*professional people giving out the money*". Further, ministries are only "*pushing some focus points*" or the problem is instead with the rules of the funding, which are too strict, thus blocking "*new ideas*" to come true (IS1).

"*Most creative sectors have some kind of funding mechanisms, but there are limited resources within them. There is no one funding mechanism for the entire CCIs*" (IS2).

"*Ministries are so stuck in their boxes. Either it is culture or you should be business. Otherwise they don't accept it. In the creative industries we have culture and business mixing*" (IS1).

According to an interviewee, support systems and measures (e.g. innovation and research funds) should be opened up more for the creative industries, because currently they are too "*scientifically focused*". These funds should also be more easily accessible, "*without having to write like huge thesis about what you are doing*" (IS1).

As for the funding schemes, grants and stipends, there are Stipend Funds for designers, visual artists, writers, performing artists, musicians and composers (by Ministry of Education, Science and Culture). In addition to these, there are for example funds for literature, non-fiction writers, music and film sectors. Independent state owned NSA Ventures fund has an active part in business development and growth in Iceland, by investing in potential innovative and pioneering firms, including CCIs[151] [152]. The Ministry of Education, Science and Culture (Department of Cultural Affairs) supervises the public support for arts and

[150] Íslandsstofa (2014). About Promote Iceland. http://www.islandsstofa.is/en/about

[151] Margrét Sigrún Sigurðardóttir &Tómas Young (2011). Towards Creative Iceland: building local, going global. Quantitative and qualitative mapping of the cultural and creative sectors in Iceland.

[152] CIM Creative Industries Management Ltd. (2012). Mapping of Nordic Creative and Cultural Industries Financial Environment. A KreaNord Report 1/2012.

culture. The objective of the state's support for the arts and culture is that everyone residing in Iceland has the opportunity to enjoy arts and culture regardless of their social status, and to ensure a favorable working environment for artists[153].

> *"Current policies, as such, support the development of the CCI sectors rather well and there seems to be a great willingness for support. However, the financial support from the government is unstable and funds which have been established have been cut during the past 2 years. A long term vision of support is needed"* (IS2).

Table 5: Key organizations and networks in Iceland in CCI[154 155]

GENERAL BUSINESS SERVICES	COPYRIGHT ORGANIZATIONS
Promote Iceland (public-private partnership); Invest in Iceland (managed by the Promote Iceland); Innovation Centre Iceland (governmental; research, consulting, innovation and entrepreneur services); Hlemmur Incubator Center for Creative Industries; Tæknigarður (incubating centre); Startup Reykjavik Business Accelerator;	Fjölís IHM Myndstef SFH Smáís STEF
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
NSA Ventures (Nýsköpunarsjóður) (governmental); AUÐUR I (NSA Ventures); Frumtak (NSA Ventures); Brú II Venture Capital Fund (NSA Ventures); Thule Investments; Reykjavík Loftbrú; Icelandic Literature Fund (ILF); Music Fund (governmental); Icelandic Film Fund (governmental);	Hólar University College Iceland Academy of the Arts; University of Akureyri; University of Iceland; Icelandic Centre for Research (Rannís);
INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)	
Icelandic Art Centre (IAC) (promotion and support of Icelandic visual arts abroad); Federation of Icelandic Artists (Bandalag íslenskra listamanna, BÍL);	
INTEREST ORGANIZATIONS (SECTOR SPECIFIC)	**OTHER**
Association of Icelandic Film Directors; Association of Icelandic Film Producers (Sambands íslenskra kvikmyndaframleiðenda, SÍK); Association of Performing Arts; Association of the Icelandic Film Industry; Iceland Music Export (IMX); Iceland Music Information Centre (IceMIc); Icelandic Association of Professional Dancers (Félag íslenskra listdansara, FÍLD); Icelandic Centre of the ITI (Icelandic Theatre Association); Icelandic Film Makers Association; Icelandic Gaming Industry (IGI); Icelandic Musicians Union (Félag íslenskra hljómlistarmanna); Icelandic Printmakers' Association (Íslensk grafík); Film in Iceland (managed by the Promote Iceland);	

[153] Ministry of Education, Science and Culture (2015). Culture. http://eng.menntamalaraduneyti.is/subjects/culture/
[154] Kulturkontakt Nord (2014). Kulturlänkar. Island. http://www.kulturkontaktnord.org/kulturportalen/kulturlankar/index.php?option=com_customproperties&view=show&task=show&Itemid=185&cp_type=&cp_region=island&cp_text_search=&submit_search=S%C3%B6k
[155] FAME (2012). A Qualitative Mapping of Available Financing for European Creative Industry SME's.

National strategies, policies, programmes, action plans and initiatives

- Creative industries – Vision for the future
- Iceland 2020 – governmental policy statement for the economy and community
- Design as a Driver for Future - Icelandic Design Policy 2014–2018
- Innovation strategy 2014-2018

At the policy level, the Vision for Future presents suggestions on how the CCIs can be supported through legislation, government and finance and also through investments in education, research and innovation[156]. In order to ensure growth of CCIs, the Iceland 2020 statement urges to identify the obstacles on their path and to work on formulating recommendations for any necessary reforms. Support will be given to facilitate the marketing of Icelandic art, culture, design and ingenuity abroad. There is a particular need to consider the role of the educational system to ensure that young people and the unemployed are provided with educational opportunities in areas where there is potential for growth and a shortage of labor[157]. The Design Policy has three main pillars of operation. These are education and knowledge, designers' work environment and support system. In addition the policy calls for the awakening in companies, public sector and society at large, concerning the potential that design represents[158].

> "*We don't have enough strategic support towards the sector in whole*" (…) *I think that we would need high level policy about it … try to make CCIs like a cluster*" (IS1).

Creative cases

In Iceland, a pan-Nordic project **13AL+** (by Iceland Design Center) joined together Icelandic designers and Swedish aluminum manufacturing companies, in order to explore how design can be used as a driver for innovation within the metal industry and how the knowhow can be translated into tangible products in cooperation with designers and industry manufacturers[159].

Reykjavík Loftbrú (ended in 2014) (by e.g. City of Reykjavik, Icelandair, Performing Rights Society and Icelandic Musicians Union) was a travel funding scheme, providing support in the form of air tickets and excess baggage allowances for musicians to help gain a foothold in overseas markets and thereby promote Reykjavík as a modern cultural city[160].

Fab Lab (by Innovation Center Iceland) is a digital workshop, providing tools and equipment for individuals and companies, in order to train their creative talent and bring ideas in practice with the help of digital equipment. The Fab Lab aims to increase knowledge about digital production methods and foster innovation in Iceland[161].

http://www.icelanddesign.is/OURPROJECTS/13Al/
http://eldri.reykjavik.is/desktopdefault.aspx/tabid-3854/6427_read-17540/6139_view-2413
http://www.nmi.is/support/still-thinking/fab-lab/

[156] Mennta- og menningarmálaráðuneytið (2012).Skapandi greinar – sýn til framtíðar. Úttekt á stöðu og tillögur um bætt starfsumhverfi. Starfshópur um skapandi greinar.
[157] Prime Minister's Office (2011) Iceland 2020 – governmental policy statement for the economy and community. Knowledge, sustainability, welfare
[158] Ministry of Industries and Innovation (2014).Design as a Driver for Future. Icelandic Design Policy 2014–2018.
[159] Iceland Design Center (2013). 13AL+. http://www.icelanddesign.is/OURPROJECTS/13Al/
[160] Margrét Sigrún Sigurðardóttir &Tómas Young (2011). Towards Creative Iceland: building local, going global. Quantitative and qualitative mapping of the cultural and creative sectors in Iceland.
[161] Innovation Center Iceland (2015). Fab Lab. http://www.nmi.is/support/still-thinking/fab-lab/

Estonia

In Estonia, the copyright-intensive industries' contribution to the national GDP was 4,6 % and their share of the total employment was 3,4 % in 2010[162]. The export of creative goods was 2,64 % of the total export and 2,39 % of the total GDP in 2012[163]. In addition, according to an interviewee, 11,4 % of all Estonian companies are from the CCI sector (EST2).

The creative industry policies are coordinated in cooperation between the Ministry of Culture and Ministry of Economic Affairs and Communication. The Ministry of Culture is the primary body that coordinates cultural policies and strategies at the level of the central government[164]. The Ministry of Culture's area of activity covers architecture, audiovisual field, design, performing arts, literature, arts, music and heritage conservation. The Parliamentary Cultural Committee sets the budgetary limits. The Ministry of Culture develops creative industries together with other ministries and it forms the principles of funding of culture and sport. It also cooperates with the Cultural Endowment of Estonia and other institutions that support culture and sport[165]. The Ministry of Economic Affairs and Communication creates the overall conditions for the growth of the competitiveness of the Estonian economy, elaborates and implements the state's economic policy and compiles national development plans[166] [167]. It also manages creative entrepreneurship issues. Today, the Ministry of Culture has even "*bigger role and more responsibilities*" (EST2) than earlier, because from 2015 onwards, "*it has been decided in the government that now also the money comes through the Ministry of Culture*" (EST2). Before this, "*the money was coming from the Ministry of Economic Affairs and Communication and ideas and directions coming from the Ministry of Culture and it was all implemented by our national development agency Enterprise Estonia*" (EST2).

According to an interviewee, the strategic support in governmental level is channeled mainly "*for fast growing sectors such as IT, gaming, new technologies and media*". Meanwhile, some other sectors "*are suffering*" because the support "*doesn't fit to all creative sectors*". For example, design sector and lifestyle companies would be an "*important part in CCI ecosystem*" (EST1).

National entrepreneurial support programs are implemented by the Enterprise Estonia, which is for example executing an awareness raising programme of creative industries. The objective of this program is to increase the entrepreneurial awareness among the current and future entrepreneurs. In addition, the programme aims to increase the awareness of the entrepreneurs about the possibilities of involvement of the creative industry in entrepreneurship. The programme is focused primarily on creating positive attitudes and mediation of different skills for strengthening the viability of the creative enterprises[168]. The Enterprise Estonia manages also the distribution of support from EU Structural Funds

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162 Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment

163 United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en

164 Council of Europe / ERICarts (2013). Country profile. Estonia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

165 Ministry of Culture (2014). Ministry of Culture. http://www.kul.ee/en/organisation/introduction-ministry

166 Ministry of Economic Affairs and Communication (2014). Introduction of the Ministry. https://www.mkm.ee/en/ministry-contact/introduction-ministry

167 Ministry's main fields of operation are: construction and housing, post, energy, information society, economic development and entrepreneurship, transport, tourism, internal market of the EU and foreign trade.

168 Enterprise Estonia (2014). Development of creative industry. http://www.eas.ee/en/for-the-entrepreneur/development-of-the-company/development-of-creative-industry

for entrepreneurship. The Creative Estonia initiative, aiming to promote and develop the creative industries in Estonia, is also operated by the Enterprise Estonia[169]. In addition, the Enterprise Estonia has for example the Innovation voucher grant and the Development voucher[170].

The Cultural Endowment of Estonia is the main institution distributing state funds for cultural purposes and public subsidies to professional artists' unions[171]. Unlike many other countries in the NDPC area, there are no arts or cultural councils in Estonia[172].

Higher arts related degrees are provided by few universities and some universities have departments for professional education e.g. in arts and music. Separate arts education programmes can be acquired from several institutions around the country. The educational institutions are state bodies, state-owned public bodies, municipal institutions or private (non-profit or for-profit) organizations, private ones being in minority though[173]. Certain research organizations are also specialized in CCIs, including for example, Tallinn University Institute for Futures Studies and the Estonian Institute of Economic Research.

> "*The way that the education system prepares culture professionals does not still answer to the needs of new business reality*" (EST2).
>
> "*I wouldn't even say that the biggest problem is that do the university programs for creative professionals have business skills studies. That's yesterday's question. I think that the biggest two problems that the art education has, is first: lack of joint programs with other areas of life. Meaning that engineers in the technical universities and the designers in the art academy do not meet a single time during the five years of study. You don't have to make universities together, but you have to have joint programs. And the second big problem is that you cannot alter creative people into a businessman. If you try to do that you will get average businessman and average art*" (EST2).
>
> "*You have purely business, you have purely creative, but this middle man is missing. And that's the big problem*" (EST2).
>
> "*We have maybe too many art students*" (EST1).

Within the interest and supportive organizations, there are particularly many from sectors of architecture, design, music, dance and theatre. Many of the interest organizations, which are supporting several CCI sectors, are state-administered. When supporting the CCIs, a lot of emphasis has been put on the incubator activities. There are incubators e.g. in Tallinn, Tartu and Viljandi, which have been set up "*specifically for creative enterprises*" (EST2). In these cases, approximately 50 % of funding comes from the cities, implicating the cities' dedication for the creative industries. In addition, part of the funding comes from EU Structural Funds and from the Enterprise Estonia.

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[169] Loov Eesti (2014). Creative Estonia. http://www.looveesti.ee/creative-estonia.html
[170] Innovation voucher grant is targeted to increase the competitiveness of SMEs through transfer of knowledge and technology. In addition, it is for expansion of cooperation with R&D institutions and for increasing the capability of protection of intellectual property. The development voucher aims to quite similar objectives. See more: Enterprise Estonia (2015). Innovation. http://www.eas.ee/en/for-the-entrepreneur/innovation
[171] Council of Europe / ERICarts (2013). Country profile. Estonia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[172] Council of Europe / ERICarts (2011). Public Bodies Responsible for National Cultural Policy Development. http://www.culturalpolicies.net
[173] Council of Europe / ERICarts (2013). Country profile. Estonia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

Channeling the funding for CCIs indirectly through creative incubators[174] has been favored, because "*we didn't believe in so much directly investing in companies, but we wanted to strengthen their existence*" (EST2). By offering supportive services through mediators and development centers, by joint marketing platforms, clusters, and incubators, it is possible to provide support actually for longer term than by making an one-time direct investment. Examples of new upcoming support measures are going to be "*possibility for the individual companies and clusters to apply for export money and also we are going to look into creative vouchers*" (EST2)[175]. In Estonia, the CCI development has been to a large extent funded from EU Structural Funds, such as European Regional Development Fund, which has been used with the Startup Estonia program, which is a national program for funding start-ups, operated by the Estonian Development Fund (a public institution and investing in innovative companies)[176]. As for the early stage companies, Estonia has "*quite well organized support system and services*". However, it was claimed that the growth companies have a "*lack of access to funding*" (EST1).

> "*I think that the main problem, why there is lack of access to those funding mechanisms, is inherent problems in those companies themselves. They are not in the growth path. They are not ambitious enough*" (EST2).

> "*If you ask me is that [availability of funding] enough, then of course not. The need of the sector is always bigger. But the biggest problem is with the private funding. There are not enough private investors, venture capitalists or business angels. The business angel community is very weak and small. And there is a limit how much the government should support you*" (EST2).

[174] In Estonia, there are several incubators for creative industries, for example in Tallinn, Tartu and Viljandi (Incubator Tallinn, Telliskivi Creative City, Tartu Centre for Creative Industries, Viljandi County Creative Incubators Foundation)
[175] Creative innovation voucher schemes has been lately recommended by e.g. European Creative Industry Alliance in its report (ECIA, 2014. Create, innovate, grow. A new policy agenda to maximise the innovative contributions of Europe's creative industries.). See NESTA's example of vouchers: Nesta (2011). A Guide to Creative Credits. http://www.nesta.org.uk/publications/guide-creative-credits
[176] Eesti Arengufond (2014). Startup Estonia. http://www.arengufond.ee/en/startup-estonia/overview/

Table 6: Key organizations and networks in Estonia in CCI[177] [178] [179]

GENERAL BUSINESS SERVICES	**INTEREST ORGANIZATIONS (SECTOR SPECIFIC) continued**
Enterprise Estonia (governmental); Estonian Investment Agency (managed by Enterprise Estonia) (promoting FDIs) Incubator Tallinn (Creative Incubator, Creative Industries Development Centre); Telliskivi Creative City; Tartu Centre for Creative Industries; Viljandi County Creative Incubators Foundation;	Independent Artists' Society; Music Export Estonia; Union Of Estonian Architects; **COPYRIGHT ORGANIZATIONS** Estonian Author's Society (Eesti Autorite Ühing); Estonian Organisation for Copyright Protection (EOCP);
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
Council for Gambling Taxes; Estonian National Culture Foundation; Estonian Development fund **INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)** Creative Estonia (governmental); Estonian Artists' Association (umbrella organization for professional unions); **INTEREST ORGANIZATIONS (SECTOR SPECIFIC)** Estonian Film Foundation (governmental); Association of Estonian Metal Artists; Association of Estonian Printmarkers; Association of Estonian Professional Musicians; Association of Estonian Scenographers; Estonian Amateur Theatre Union; Estonian Association of Advertising Agencies; Estonian Association of Designers; Estonian Association of Fashion Design; Estonian Association of Spatial Planners; Estonian Centre of Architecture; Estonian Ceramists Association; Estonian Composers Union; Estonian Contemporary Art Development Centre; Estonian Dance Artists Union; Estonian Dance Council; Estonian Design Centre; Estonian Fashion Designers' Union; Estonian Film Commission; Estonian Filmmakers Union; Estonian Folk Art and Craft Union; Estonian Glass Artists' Union; Estonian Graphic Designers' Union; Estonian Interior Decorators' Union; Estonian Landscape Architects' Union; Estonian Leatherwork Artists' Union; Estonian Literary Society; Estonian Literature Development Centre; Estonian Literature Information Centre; Estonian Media Artists Union; Estonian Music Development Centre; Estonian Music Information Centre; Estonian Painters Association; Estonian Professional Dancers Union; Estonian Publishers' Association; Estonian Sculptors' Union; Estonian Textile Artists' Association; Estonian Theatre Agency; Estonian Theatre Union; Estonian Writers Union; Estonian Young Architects Association	Computer Science College; Estonian Academy of Arts; Estonian Academy of Music and Theatre; Estonian Business School; Tallinn School of Economics; Tallinn University of Applied Sciences; Tallinn University of Technology; Tallinn University; Tartu Art College; Tartu Higher Art School; The Estonian Information Technology College; Euroacademy; TTK University of Applied Sciences; University of Tartu; Võru County Vocational Training Centre; Estonian Institute for Futures Studies (Tallinn University); Estonian Institute of Economic Research **OTHER** Cultural Endowment of Estonia (Eesti Kultuurkapital) (state-owned cultural foundation); Estonian Institute (promotion of Estonian culture abroad)

[177] Ministry of Education and Research (2014). Studying in Estonia. http://www.hm.ee/en/activities/higher-education
[178] Loov Eesti (2014). Support structures. http://www.looveesti.ee/support-structures.html
[179] Eesti Instituut (2014). Professional Unions. http://cultureguide.culture.ee/associations/professional-unions

National strategies, policies, programmes, action plans and initiatives

- Operational Programme for the Development of Economic Environment
- Operational Programme for Cohesion Policy Funds 2014-2020
- Estonian Entrepreneurship Growth Strategy 2014-2020
- Estonian Research and Development and Innovation Strategy 2014-2020[180]

In policy making, Cultural and Creative Industries have been identified in innovation, entrepreneurial, cultural and startup policies as an "*important part of product development*". However, there is still work to do in order to "*increase awareness about the CCIs*" (EST1). CCIs role in the national innovation ecosystem "*is very important, but it is not used in their full potential*" (EST2).

> "*Creative industry is an important part of EU funds strategy, National strategy. It is clearly mentioned in Entrepreneurship strategy and National innovation strategy. And also of course it is one of the central questions of the National Culture Policy*" (EST2).

The Operational Programme for the Development of Economic Environment includes the objective of supporting the development of creative industries. For example, to facilitate creativity, the development of a creative working and overall environment will be supported in order to improve the knowledge of entrepreneurs, creators and consumers and to foster creative development in the educational system. Awareness-raising in the fields of creative industries and use of personal creativity will provide the conditions for successful implementation of development activities in the future. The more open-minded attitude of target groups will also facilitate the development activities aimed at supporting creative industries networks, clusters, environments, and infrastructure, which are intended for targeted development of integrated creative environments for both creators and the general public, and the creation of national and international cooperation networks. Such activities must also lead to the formation of creative industries clusters and more extensive development of creative industries[181].

The Estonian Entrepreneurship Growth Strategy outlines that the development of creative industries is based on three pillars: raising awareness and offering training (for companies), support for start-ups and their incubation period, support for sectoral development and exports[182]. Also, the Operational Programme for Cohesion Policy Funds takes a direct stand on creative industries. In order to improve the competitiveness and increase the volume of exports of enterprises operating in creative industries and to link the potential of creative industries to the rest of the economy, it is planned to pay attention to awareness-raising (on CCIs), carry out activities aimed at developing knowledge and skills (including training courses), support creative incubators, sectoral development activities and regional and sectoral development centres[183]. However,

> "*we still don't have national strategy for CCIs. Because we believe in horizontal role of CCIs, meaning that we instead prioritize how to put CCIs in other policy areas. If you look that way, it is quite well covered*" (EST2).

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[180] Ministry of Education and Research (2014). Estonian Research and Development and Innovation Strategy 2014-2020 "Knowledge-based Estonia". https://www.hm.ee/sites/default/files/estonian_rdi_strategy_2014-2020.pdf

[181] Ministry of Finance (2010). Operational Programme for the Development of Economic Environment. http://www.struktuurifondid.ee/op-development-of-economic-environment/

[182] Ministry of Economic Affairs and Communication (2013). Estonian Entrepreneurship Growth Strategy 2014-2020 (SEPTEMBER 2013). http://kasvustrateegia.mkm.ee/pdf/Estonian%20Entrepreneurship%20Growth%20Strategy%202014-2020.pdf

[183] Ministry of Finance of the Republic of Estonia (2014). Operational Programme for Cohesion Policy Funds 2014-2020. European Union Structural Assistance to Estonia. http://www.struktuurifondid.ee/public/EE_Operational_Programme_EN.pdf

Although CCIs have a very important role when it comes to the national innovation ecosystem, they are not "*used for their full potential*". For example, design sector is "*underperforming, but companies are not really understanding this value of working with designers*" (EST2).

Creative cases

Incubator Tallinn operates the Creative Incubator, which provides spaces for entrepreneurs in creative industry, whose business is in the starting or development phase. The main aim is to increase the business competitiveness of creative enterprises by creating soft infrastructure: cooperation and participation mechanisms, development and internationalization support. The Incubator hosts also the Creative industries Development Centre, which supports creative enterprises and entrepreneurs, by helping them to develop entrepreneurship, encourage internationalization, and promote sales activity on foreign markets[184].

TeamLab, organized by the Creative Estonia, was a product development weekend, in which designers, engineers, business and marketing managers together with people with new product ideas were developing new products. The owner of the product idea had also a possibility to gather a team of contributors who could develop the idea suitable for market conditions[185].

MakerLab (operated by Tallinn Creative Hub) provides spaces for seminars and gatherings. There is also a machine shop and rooms for dusting and painting and a laboratory space, where it is possible to test new innovations and prototypes by using e.g. 3d-printing and laser-cut equipment[186] [187].

http://inkubaator.tallinn.ee/eng/business-incubation-services/start-up-services/
http://www.looveesti.ee/teamlab-product-development-weekend-get-your-ideas-global/
http://www.kultuurikatel.ee/makerlab/

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[184] Tallinna Loomeincubaator (2015). Creative entrepreneurship. http://inkubaator.tallinn.ee/eng/business-incubation-services/start-up-services/

[185] Creative Estonia (2012). TeamLab product development weekend: Get your ideas global!. http://www.looveesti.ee/teamlab-product-development-weekend-get-your-ideas-global/

[186] Kultuurikatel (2015). Tallinn Creative Hub MakerLab. http://www.kultuurikatel.ee/tallinn_creative_hub_makerlab

[187] Tallinna Kultuurikatel (2015). Makerlab. http://www.kultuurikatel.ee/makerlab/

Latvia

In Latvia, the copyright-intensive industries contributed to 4,2 % of the national GDP and their share of total employment was 2,6 % in 2010[188]. The export of creative goods was 1,84 % of the total export and 1,13 % of the total GDP in 2012[189].

As for the governmental policy-making, the Ministry of Culture organizes and coordinates state culture and cultural education policy. The Ministry has a jurisdiction over the following fields: copyrights, libraries, museums, music, fine art, amateur and folk art, theatre, literature, film art, cultural education and architecture. The Ministry of Culture cooperates mainly with municipalities and non-governmental bodies. The Ministry of Culture's Cultural Policy Department has a separate division for the creative industries and there is also the Consultative Council for Creative Industries, which has an advisory role in the ministry's decision making. The Ministry of Culture has 10[190] advisory and sector specific councils involved with the creative industries. The National Board of Culture is the most important advisory body to the Minister of Culture in the fields of cultural policy and cultural economy [191] [192].

The Ministry of Culture, the Ministry of the Economics and the Ministry of Education and Science are responsible for the development of the creative industries. In the development of design policy, the Ministry of Culture cooperates with the Ministry of the Economics, which coordinates the work of the Design Council. As for the financial support, the Ministry of Culture cooperates with the Ministry of the Economics, the Ministry of Education and Science and the Ministry of Finance in providing support to the creative industries[193].

Governmental operators have also significant cooperation with non-governmental organizations, including for example the Design Information Center, the Latvian Designers' Society, and the Latvian Association of Architects in CCI policy development[194].

The implementation of creative industry policies is hence implemented on a basis of inter-institutional cooperation. However, the Ministry of Culture can be considered as the "*one steering the whole process*" (LV1), because the Council for Creative Industries is under the auspices of the ministry. The Council acts as a "*strategic think-thank bringing different stakeholders from public and private sector together, helping them to create policies and funding mechanisms"*. The Council for Creative Industries is also acting as a "*lobbying instrument*" (LV1).

There are several state agencies or bodies, that promote public participation in cultural life (National Council of Culture), have a consultative role (Design Board), promote international cultural cooperation

[188] Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment

[189] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en

[190] Literature and Publishing, Music, Theatres, Film, Visual Arts, Museums, Library, Architecture, Design and Consultative Council for Creative Industries.

[191] Ministry of Culture of the Republic of Latvia (2014). Ministry of Culture of the Republic of Latvia. http://www.km.gov.lv/en/

[192] Council of Europe / ERICarts (2012). Country profile. Latvia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

[193] Council of Europe / ERICarts (2012). Country profile. Latvia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

[194] Ministry of Culture Republic of Latvia (2014). Responsible Institutions and Partners. http://www.km.gov.lv/en/cross_sector/creative/institutions.html; Cultural and Creative Industries.

(Latvian Institute), implement the state cultural policy (National Film Centre), provide different entrepreneurial services (Investment and Development Agency of Latvia) or operate as a state's grant giving body and secure the diversity of cultural activities all over Latvia (State Culture Capital Foundation)[195 196].

Higher arts education in Latvia is provided in four state funded educational institutions. In addition, there are multiple arts study programs in other universities (public and private). Arts education in Latvia is supervised by a state agency, the Centre for Intangible Heritage and Culture Education[197]. Latvian National Centre for Culture coordinates the implementation of the state cultural and creative industries education policies[198]. In practice,

> "*higher arts education does not fully respond to the needs of the CCI business sector. There is a lot of work to be done to adjust the educational programs, to make more synergies with other universities*" (LV1).

In funding of creative activities the State Cultural Capital Foundation (SCCF) administers culture project competitions, allots life-long grants for culture and arts workers for their life achievement in the development of culture and art, and awards financial support to short term educational, creative or scientific travels abroad. It does not deal with commercial activities. The aim of the SCCF is to promote balanced development of creativity in all the branches of art and preservation of the cultural heritage in the country in conjunction with the guidelines of the state cultural policy[199]. The Investment and Development Agency of Latvia (LIAA) is a state institution providing for example start-up information and services, state support programs, opportunities to attract funding and support for export operations[200].

Among the CCI interest organizations, the Council of the Creative Unions of Latvia, is one of the widest ones and has 10 member associations, unions or societies, covering most of the CCI sectors. Among other operators, for example the film and music sector are represented by several interest organizations.

[195] Council of Europe / ERICarts (2012). Country profile. Latvia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[196] Ministry of Culture Republic of Latvia (2014). Responsible Institutions and Partners. http://www.km.gov.lv/en/cross_sector/creative/institutions.html
[197] Council of Europe / ERICarts (2012). Country profile. Latvia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[198] Ministry of Culture Republic of Latvia (2014). Responsible Institutions and Partners. http://www.km.gov.lv/en/cross_sector/creative/institutions.html
[199] State Culture Capital Foundation of Latvia (2015). English. http://www.kkf.lv/#241
[200] Ministry of Culture Republic of Latvia (2014). Responsible Institutions and Partners. http://www.km.gov.lv/en/cross_sector/creative/institutions.html; Cultural and Creative Industries.

Table 7: Key organizations and networks in Latvia in CCI[201] [202]

<table>
<tr><th>GENERAL BUSINESS SERVICES</th><th>COPYRIGHT ORGANIZATIONS</th></tr>
<tr><td>Investment and Development Agency of Latvia (LIAA);
Invest in Latvia (managed by LIAA);
Small and Medium Enterprises in Latvia (MVU) (information about SMEs);
Creative Andrejsala (incubator for CIs);
RISEBA Creative Business Incubator;</td><td>LaIPA;
Copyright and Communication Consulting Agency/Latvian Authors Association (AKKA/LAA);
Latvian Music Producers' Association (LAMPa)</td></tr>
<tr><th>FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES</th><th>EDUCATION AND RESEARCH</th></tr>
<tr><td>State Culture Capital Foundation (SCCF);
Atspēriens (TAKEOFF) (grant programme);
Latvian Guarantee Agency LGA (SIA Latvijas Garantiju aģentūra);
Riga Film Fund (municipal);</td><td rowspan="3">Art Academy of Latvia;
Daugavpils University;
ISMA University of Applied Sciences;
Janis Rozentals School of the Arts;
Jāzeps Vītols Latvian Academy of Music;
Latvian Academy of Culture;
Latvian Culture College;
Liepaja University;
Riga Design and Art School;
Riga International School of Economics and Business Administration (RISEBA);
Riga Technical University;
Transport and Telecommunication Institute;
University College of Economics and Culture;
University of Latvia;
Vidzeme University of Applied Sciences;
Centre of Culture and Creative Industries' Education of Latvia (governmental);</td></tr>
<tr><th>INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)</th></tr>
<tr><td>Latvian National Centre for Culture (governmental);
National Board of Culture (public council);
Council of the Creative Unions of Latvia (LRSP)(*)</td></tr>
<tr><th>INTEREST ORGANIZATIONS (SECTOR SPECIFIC)</th><th>OTHER</th></tr>
<tr><td>Design Board (public council);
National Film Center of Latvia (NFC) (governmental);
Artists Union of Latvia (AUL);*
Design Information Centre;
Latvian Amateur Theatre Association;
Latvian Association of Architects (LAA);*
Latvian Centre for Contemporary Art;
Latvian Composers Union (LCU);*
Latvian Designers Society (LDS);*
Latvian Film Producers Association;
Latvian Filmmakers Union;*
Latvian Film Service Producers' Association;
Latvian Game Developers' Association;
Latvian Literature Centre;
Latvian Music Information Centre;
Latvian Photographers Federation;
Latvian Playwrights Guild (LPG);*
Latvian Scientists Union (LSU);*
Latvian Theatre Workers Association (LTWA);*
Latvian Union of Journalists;
Music in Latvia;
Musicians Society (TORNIS);
New Theatre Institute of Latvia;
RIXC Center for new media culture
Society of Photographic Arts of Latvia (SPAL FIAP);*
Writers Union of Latvia (WUL);*</td><td>Latvian Institute (promotion of Latvia);
Culture Information Systems (state agency; projects to provide access to the information resources and cultural values);
State Centre for Arts Education and Intangible Heritage (responsible for the cultural and creative industries education);</td></tr>
</table>

[201] Ministry of Culture Republic of Latvia (2014). Responsible Institutions and Partners. http://www.km.gov.lv/en/cross_sector/creative/institutions.html; Cultural and Creative Industries.
[202] Study in Latvia (2014). Study programmes. http://www.studies.lv/en/studies/study-programmes

National strategies, policies, programmes, action plans and initiatives

- National Development Plan of Latvia for 2014–2020
- Sustainable Development Strategy of Latvia until 2030
- Cultural Policy Guidelines 2014-2020 "Creative Latvia"
- Design Strategy of Latvia 2020

At the policy level, CCIs have been viewed "*mostly as part of the cultural policies, but also partly of educational and business policies*" (LV1). The National Development Plan outlines that one of its goals is the development of commercial creative industries, measured by increased share of creative industry exports in the total exports and increased proportion of businesses operating in the CCIs in the total number of businesses. This is to be done under the Strategic objective "highly productive manufacturing and internationally competitive services with export potential". Measures to be carried out within the Strategic objective are to develop a specialized assistance instrument, support the creative industry to develop culture-based investment, and promote partnerships between culture, science and business in boosting the export capacity of businesses in the creative industries and the international competitiveness of the country[203].

The Sustainable Development Strategy aims for example to establish a creative society by developing creative skills of each individual, taking creativity as an integral part of educational programmes, creating urban environments, developing the CCIs, using the potential of cultural heritage when developing creative tourism, expanding the digital culture space of Latvia and by public participation in the creation of cultural processes[204].

The Creative Latvia guidelines envisages that Latvia is a country with a rich and nourished heritage, a vibrant and diverse cultural life, creative people, and creative industries with high export potential by the 2020. In addition, the quality of life for everyone is to be improved. In order to reach this vision, the following priorities are set: preservation and development of cultural capital involving community members in cultural processes; creative life-long learning and cultural education system oriented towards labor employment; CCIs with high export potential; and creative territories and accessibility of cultural services[205] [206]. The National Culture Policy Guidelines 2006-2015 targeted to the cultural development in Latvia aims to improve the cooperation between culture and the sectors of the economy, to facilitate the diversity of Latvian culture and the sustainable development of a creative economy. In addition, it aims to create an environment favorable towards the development of creative diversity and to stimulate excellence[207].

The vision of the Design Strategy is that Latvia should utilize the innovation potential of design as a strategic asset for economic growth, social well-being and national cultural identity. The action areas are:

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[203] Cross-Sectoral Coordination Centre (CCSC) of Latvia. (2012). National Development Plan of Latvia for 2014–2020. http://www.pkc.gov.lv/images/NAP2020%20dokumenti/NDP2020_English_Final.pdf

[204] Saeima of the Republic of Latvia (2010). Sustainable Development Strategy of Latvia until 2030. http://www.cbs.nl/NR/rdonlyres/B7A5865F-0D1B-42AE-A838-FBA4CA31674D/0/Latvia_2010.pdf http://www.pkc.gov.lv/images/LV2030/LIAS_2030_en.pdf

[205] Latvijas Republikas Kultūras ministrija (2014). Kultūrpolitikas pamatnostādnes 2014.–2020.gadam „Radošā Latvija". http://www.km.gov.lv/lv/ministrija/radosa_latvija.html

[206] Council of Europe/ERICarts, "Compendium of Cultural Policies and Trends in Europe (2014). Latvia / 2. General objectives and principles of cultural policy. http://www.culturalpolicies.net/web/latvia.php?aid=23&curln=103

[207] Council of Europe / ERICarts (2012). Country profile. Latvia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

fostering Latvian design quality and awareness raising; integrating design into entrepreneurship and improving the framework conditions of the Latvian Design System[208 209].

> "*Design sector with its various ways of utility could be seen as one with more potential to be recognized, understood and invested in. Combining design with traditional businesses can lead to higher value added and profitability. Also, investing in design in the research process can lead to marketable innovation*" (LV1).

However, concerning some of abovementioned policies, for example the National Development Plan there is a "*threat that due to the availability of adequate funding some of the resolutions will not be implemented from 2014 onwards*" (LV1).

> "*More specifically targeted support mechanisms for the CCI sector are needed in Latvia. There is a lack of seed money support mechanism for the start-ups to test their business idea. CCI incubation and pre-incubation support needs to be more adjusted to their specific needs. More targeted micro-credit support and guarantee schemes could be developed. Also, the criteria of the support mechanisms for the entry into new markets could be more adjusted to CCI sector needs*" (LV1).

> "*In the innovation ecosystem CCIs are seen as horizontal priority that can positively influence other sectors thus triggering innovation. There are more and more narrative about innovation that can arise from multidisciplinary partnerships combining design, business and engineering*" (LV1).

[208] Latvijas Republikas Kultūras ministrija (2014). RADOŠĀ LATVIJA 2014 – 2020 DIZAINA STRATĒĢIJA http://www.km.gov.lv/lv/doc/starpnozares/radosa/2014/DIZAINA_STRATEGIJA_FINAL_VERSIJAlab.pdf

[209] SEE Platform (2014). SEE Bulletin, Issue 11. June 2014. http://www.seeplatform.eu/docs/SEE%20Bulletin%2011%20-%20June%202014.pdf

Creative cases

The grant programme **ATSPĒRIENS** (TAKEOFF) aims to advance the development of SMEs and assist entrepreneurs to set up their infrastructure. One of the ideas behind the creation of the programme was that many of the support instruments are not adequate for the creative companies and individuals, in a sense that they could materialize their business ideas. The co-financing is available after a competition, which is open to private individuals and newly established (max. 2 years ago) enterprises. The programme is developed and funded by the Riga City Council and the AS Swedbank[210].

FOLD (operated by the Society "Forum of Latvian Designers") is a creative industries communication platform, which aims to bring together Latvian and foreign CCIs in order to foster their collaboration and learning together. The focus is on design and design thinking[211].

Creativity Week **radi!** is a week of events, organized in collaboration between the Ministry of Culture and the British Council Latvia. The program varies annually. The main aim of the radi! is to promote public awareness and interest about the CCI sector, creativity promoting education, innovations and creative management. This is to be done by demonstrating the experience and achievements of Latvia. The Creativity Week 2015 held in March promoted the cross-over competencies of creative industries and design thinking as an effective tool for creating new partnerships[212].

Creativity Castle (Radošuma pils) is a programme initiative aiming to facilitate growth in Latvia by promoting creative thinking as a basis of an innovative economy. The programme is dedicated to developing the creative thinking capabilities of Latvian secondary schools students, and their entrepreneurial skills. The initiative has been established by the Ministry of Education and Science, the State Education Contents Centre, the Junior Achievement Young Enterprise Latvia, the Soros Foundation Latvia and private entrepreneurs[213].

http://www.investeriga.lv/eng/our-services/grant-programme-takeoff/
http://www.fold.lv/en/about-fold/
http://www.radilatvija.lv/en
http://www.radosumapils.lv

[210] Riga City Council (2012). Grant programme ATSPĒRIENS. http://www.investeriga.lv/eng/our-services/grant-programme-takeoff/
[211] Forum of Latvian Design (2015). About FOLD. http://www.fold.lv/en/about-fold/
[212] Forum of Latvian Design (2014). Next week — «radi!2014». http://www.fold.lv/en/2014/05/next-week-radi2014/
[213] Estonian Ministry of Culture (2011). Creative industries in Estonia, Latvia and Lithuania.

Lithuania

In Lithuania, the economic contribution of copyright-intensive industries to the national GDP was 3,4 % and their share of the total employment was 2,4 % in 2010[214]. The export of creative goods was 2,89 % of the total export and 2,42 % of the total GDP in 2012[215].

Ministries, which steer the CCI policy development in Lithuania are the Ministry of Economy, the Ministry of Culture, and the Ministry of Education and Science (LT1). However, the Ministry of Culture and the Ministry of Economy are the main operators.

The Ministry of Culture holds the main responsibility in forming the general culture policy guidelines in Lithuania[216]. It is in charge of formulating and implementing the state culture policies in the fields of professional and amateur art, theatre, music, fine arts, cinema, museums, libraries, publication as well as in the area targeted to safeguarding the copyright and neighboring rights and the protection of cultural values[217]. In addition, the Ministry of Culture bears responsibility for professional art and creative industries, heritage, ethnic and amateur culture and monitoring of the functioning of the national cultural institutions[218]. The Ministry of Culture has also a separate department of Art and Creative Industries Policy, which has been established in 2013[219]. The Ministry of Culture supports (through the Lithuanian Council for Culture) the promotion of CCIs in the society, the export activities, development of competences and innovative CCI products and services, and networking and cross-sectoral cooperation (LT1). Under the Ministry of Culture there are 10 councils, operating as advisory boards (or expert commissions) to the ministry, which are contributing to the implementation of the state cultural policy. They include, for example, Lithuanian Culture and Art Council, Film Council, Council of Copyright and Related Rights of Lithuania, and Council for Digitisation of Lithuanian Cultural Heritage[220].

The Lithuanian Council for Culture is a state-owned budgetary institution for the Ministry of Culture. It has multiple functions, including provision of co-financing to culture and arts projects, administration of the Culture Support Fund, awarding grants and providing scholarships and other financial support to culture and art creators, organization of culture and arts research, and monitoring and analysis of culture and arts projects[221]. In general, the Lithuanian Council for Culture implements the State culture policy in the governance areas assigned to the Minister of Culture, except for the areas assigned to the Lithuanian Film Centre[222]. The main objectives of the Lithuanian Council for Culture are to support and facilitate the development and dissemination of culture and arts, and ensuring rational and effective usage of public funds. In addition, the Council monitors and analyzes the interior and outside culture and arts processes, hence influencing the national culture policy[223].

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[214] Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment
[215] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[216] Council of Europe / ERICarts (2014). Country profile. Lithuania. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[217] Ministry of Culture of the Republic of Lithuania (2015). Ministry. http://www.lrkm.lt/go.php/eng/IMG
[218] Council of Europe / ERICarts (2014). Country profile. Lithuania. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[219] Ministry of Culture of the Republic of Lithuania (2015). Contacts. http://www.lrkm.lt/go.php/eng/Art-and-Creative-Industries-Policy-Department
[220] Ministry of Culture of the Republic of Lithuania (2012). Councils under the Ministry. http://www.lrkm.lt/index.php?4010474073
[221] Lithuanian Council for Culture (2015). Key functions. http://www.ltkt.lt/en/about-us/key-functions.html
[222] The Lithuanian Council for Culture (2015). About us. http://www.ltkt.lt/en/about-us.
[223] Lithuanian Council for Culture (2015). Our main objectives. http://www.ltkt.lt/en/about-us/our-main-objectives.html

Two funds are responsible for allocating public money for culture: The Culture Support Fund and the Press, Radio and Television Support Fund (Media Support Fund). The Culture Support Fund finances culture and arts projects and programmes carried out by legal entities registered in Lithuania. Its resources comprise of state budget allocations and other acquired funds from e.g. excise duty and gambling tax[224]. The Media Support Fund provides funding for culture, art and educational publications, regional media, radio and television, online media (information media), and children and youth cultural education. The Media Support Fund is financed by the Ministry of Culture [225].

> "*As CCIs nature is interdisciplinary, the most efficient funding models should focus on integrated investment from several sources and various purposes*. (…) *However, a big challenge is to coordinate and combine different sources of investments*" (LT1).

The Ministry of Economy is in charge of the development of business and investment environment, export promotion, issues relating to patents and innovation, investments to the development of high value added products, cooperation between science and business, commercialization of scientific research results, promotion of clusterization, management of state-owned enterprises, management of EU Structural funds and public procurement[226]. The Ministry of Economy provides also support for start-ups and development of network of the art incubators (LT1).

The Ministry of Culture and the Ministry of Economy have been together seeking to create specific measures for promotion of creative industries in Lithuania. One of the concrete means is the development of an arts incubator network utilizing EU structural funds. The network includes 9 art incubators (in Vilnius, Kaunas, Klaipėda, Telšiai, and Anykščiai), which started their operations in 2012[227].

In addition to the Ministry of Culture and Ministry of Economy, the Ministry of Education and Science is involved with the CCI policy development. The Ministry of Education and Science is also managing for example certain development, training and teaching programmes on CCIs (see Creative cases: the Creative partnerships) (LT1).

Main educational institutions providing higher arts and culture related education are the Vilnius Academy of Arts, the Lithuanian Music and Theatre Academy, Klaipėda University (Faculty of Arts), and Šiauliai University (Faculty of Arts), of which the two first mentioned are under the Ministry of Education and Science, which is responsible for culture and art education. Also, the Vytautas Magnus University (Kaunas) has a Faculty of Arts and Music Academy. These institutions provide BA, MA, and PhD study programmes. In addition, there are other universities with arts and culture related faculties and municipal and private arts schools and studios for fine arts, music, performance and dance[228].

> "*[The art education] is primarily focused on traditional arts and cultural professions. Art education should move towards developing entrepreneurship, business skills, as well as creating an eco-system for creative innovation within the schools of higher education, fostering administrative, infrastructural, financial and skills prerequisites for the development of creative innovation and entrepreneurship*" (LT1).

[224] Council of Europe / ERICarts (2014). Country profile. Lithuania. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[225] Spaudos, radijo ir televizijos rėmimo fondas (2012). Apie fondą. http://srtfondas.lt/index.php?Apie-fonda
[226] Ministry of Economy of the Republic of Lithuania (2012). Management. http://www.ukmin.lt/web/en/the_ministry/management
[227] Estonian Ministry of Culture (2011). Creative industries in Estonia, Latvia and Lithuania.
[228] Council of Europe / ERICarts (2014). Country profile. Lithuania. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

For the general business support there is for example the Enterprise Lithuania (general business promotion) and Lithuanian Business Support Agency (administration of different support funds). The National Association of Creative and Cultural Industries (KiK) has been established in order to support the cooperation between artists, culture and art organizations, NGOs, businesses, science and educational sectors. In addition, the KiK supports artists' participation in regional and international networks and workshops, and it aims to stimulate the creative industries in Lithuania. By bringing together different operators in CCIs, the KiK aims to enhance the prestige of creative professions in the society and promote the creative activities in Lithuania. In addition, it fosters the development of CCIs[229] [230]. As for the horizontal interest organizations, for example the Lithuanian Association of Artists (LMKA) is a union of 12 Lithuanian independent creative organizations. It coordinates the co-operation of the art creators and their organizations, and also represents the interests of the artists abroad[231]. In addition to these, there are several unions and associations for different creative industry sectors.

[229] Council of Europe / ERICarts (2014). Country profile. Lithuania. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[230] National Association of Creative and Cultural Industries (2015). About us. http://www.kikas.lt/en/about-us
[231] The Lithuanian Association of Artists (2015). About us. http://www.lmka.lt/en/apie-mus/

Table 8: Key organizations and networks in Lithuania in CCI[232] [233] [234] [235] [236]

GENERAL BUSINESS SERVICES	**COPYRIGHT ORGANIZATIONS**
Lithuanian Business Support Agency (LVPA) (Ministry of Economy; e.g. administration of national and EU support funds); Invest Lithuania (foreign investment promotion) (governmental); Enterprise Lithuania (business promotion agency); Lithuanian Development Agency for Small and Medium Sized Enterprises Užupis Art Incubator; Užupis Creative Cluster (CIs, information and communication); REDIRECTED Cluster (creative industries: films, cross-media, specialized interactive solutions); MEDIAPOLIS (Digital Creative Industry Cluster); Vilnius Film Cluster; Šiauliai Business Incubator (Šiauliai Business Advisory Centre);	Association of Producers of Audiovisual Works (AVAKA); Lithuanian Agency of Association of Protection of Copyright (LATGA-A); Lithuanian Related Rights Association (AGATA); Music Copyright Association (NATA);
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
Culture Support Fund (Lietuvos Kultūros Taryba) (administered by Lithuanian Council for Culture); Press, Radio and Television Support Fund (Media Support Fund) (Ministry of Culture); LitCapital I (capital fund; private SMEs); Business Angels Fund I (production and service companies; e.g. innovative technologies, IT, telecommunication etc.);	European Humanities University; Kaunas University of Technology; Klaipėda University; Lithuanian Academy of Music and Theatre; Mykolas Romeris University; Siauliai University; Vilnius Academy of Arts; Vilnius Gediminas Technical University; Vilnius University; Vytautas Magnus University; Lithuanian Culture Research Institute (LCRI), (state institution);
INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)	
Lithuanian Council for Culture (budgetary institution for the Ministry of Culture); Lithuanian Association of Artists (Lietuvos Meno Kūrėjų Asociacija, LMKA)(*); National Association of Creative and Cultural Industries (KiK);	
INTEREST ORGANIZATIONS (SECTOR SPECIFIC)	**OTHER**
Architects' Association of Lithuania;* Association of Publishers of Lithuania; Independent Producers Association of Lithuania; Lithuanian Painters' Association;* Lithuanian Association of Graphic Design; Lithuanian Association of Literary Translators;* Lithuanian Composers' Union;* Lithuanian Design Forum; Lithuanian Designers' Society (LDS);* Lithuanian Filmmakers' Union;* Lithuanian Film Centre; Lithuanian Musicians' Union;* Lithuanian Publishers Association; Lithuanian Theatre Union;* Lithuanian Union of Journalists;* Lithuanian Writers' Union;* Professional Folk Artists' Association;* Union of Lithuanian Art Photographers;*	Lithuanian Folk Culture Centre (governmental); Lithuanian Innovation Centre (LIC) (public institution/non-profit organization; innovation support services);

[232] Education Exchanges Support Foundation (Study in Lithuania) (2014). Study programmes. http://www.studyinlithuania.lt/en/study_programs
[233] Ministry of Culture of the Republic of Lithuania (2012). Activities. http://www.lrkm.lt/go.php/eng/Activities
[234] Lietuvos Meno Kūrėjų Asociacija (2014). LMKA members. http://www.lmka.lt/en/helpers/lmka-nariai/
[235] Klaster LT (2012). Clusters in Lithuania. http://www.kkt.lt/en/clusters
[236] Internet pages of referred organizations.

National strategies, policies, programmes, action plans and initiatives

- Lithuanian Progress Strategy - Lithuania 2030
- National Progress Programme for 2014-2020
- Lithuanian Innovation Development Programme 2014–2020
- Guidelines for Alternation of the Lithuanian Cultural Policy
- Strategic Development Guidelines of the Cultural and Creative Industries for 2014-2020 (upcoming in 2015)

The concept of creative industries was first included in the Lithuanian Strategy for the use of EU Structural Funds for 2007-2013, and also in the Operational Programme for Economic Growth 2007-2013[237]. Followed by these, in 2007 the Strategy of Promotion and Development of Creative Industries was created. In this document, the main objectives were to encourage the establishment of creative industries, to improve their competitiveness and to increase their contribution to the economy. One measure for implementing this strategy was the support for art incubators co-funded with the European Regional Development Fund[238].

Currently, the Lithuania 2030 Progress Strategy outlines some key initiatives for change and economic integrity. One of the goals is to create favorable conditions for the development of creative and cultural industries and their international competitiveness[239]. Lithuania 2030 Progress Strategy outlines three main focus areas that are smart economy, smart society and smart governance. In the smart economy, one of the key initiatives for change is economic integrity. In order to achieve this, the integration of business, education, science and culture should be facilitated. In addition, favorable conditions for the development of creative and cultural industries and their international competitiveness must be created. In addition, three horizontal progress areas are identified in the Progress strategy, including culture, health for all and regional development[240]. The National Progress Programme (NPP) for 2014-2020 is the implementation tool of the Lithuania 2030.

The Lithuanian Innovation Development Programme 2014–2020 has been compiled in order to mobilize the state resources for the improvement of Lithuania's innovativeness and development of competitive economy based on high level knowledge, high technologies, qualified human resources and smart specialisation. The programme also states that creative activity is necessary for the advancement of all sectors and that the use of creative knowledge can deliver high value added for other sectors. Thus, CCIs are recognized as part of the national innovation ecosystem due to interdisciplinary and cross-sectoral innovation potential[241].

> "*Despite the fact that CCI sector in Lithuania is recognized as a viable, solid and promising sector of the Lithuanian economy, despite of ongoing and planned investments in this area, the policies in this sector are still not sufficient to uncover the potential of CCIs in developing creative, responsible and inclusive society,*

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[237] Estonian Ministry of Culture (2011). Creative industries in Estonia, Latvia and Lithuania.
[238] United Nations Educational, Scientific and Cultural Organization (2015). Art Incubators in the Creative Industries Strategy of Lithuania. https://en.unesco.org/creativity/periodic-reports/innovative-examples/art-incubators-creative-industries-strategy-lithuania
[239] Government of the Republic of Lithuania (2012). LITHUANIA'S PROGRESS STRATEGY "LITHUANIA 2030" http://www.lrv.lt/bylos/veikla/lithuania2030.pdf
[240] European Commission (2012). Lithuania launches the National Progress Programme for 2014-2020. Erawatch. http://erawatch.jrc.ec.europa.eu/erawatch/opencms/information/country_pages/lt/highlights/highlight_0001
[241] Ministry of Economy of the Republic of Lithuania (2014). The Lithuanian Innovation Development Programme 2014–2020. http://www.ukmin.lt/en/innovations/programmes_and_strategies

enhancing the country's economic competitiveness, creating a culture of innovations and cultural innovations" (LT1).

The Guidelines for Alternation of the Lithuanian Cultural Policy states for example that the increase of intellectual capital of Lithuania is based on the CCIs competitiveness. In addition, copyrights and related rights must be appropriately protected, thus giving representatives of the creative industries better motivation to invest in creative product development and compete in global markets[242].

The Strategic Development Guidelines of the Cultural and Creative Industries for 2014-2020 (Kultūrinių ir kūrybinių industrijų 2014–2020 metų plėtros strategija) is to be signed and come into effect in 2015. The CCI Guidelines has been prepared in accordance with the Lithuanian Progress Strategy - Lithuania 2030 and will be implemented together with the Guidelines for Alternation of the Lithuanian Cultural Policy. The CCI Guidelines has a vision that the CCI's contribution to the GDP, CCI's share of the total exports and CCI's share of the total employment should all be 7 % by the year 2020. Implementation of the CCI guidelines sets out 4 priorities. First, creativity for all age groups of the society will be developed. Second, CCIs will be used to improve the quality of life and social welfare. Third, economic growth and export volumes can be increased with the CCIs due to their creative use of knowledge to create high added value also in other sectors. Finally, creative innovation should be promoted in all sectors of the CCIs. In particular, the audiovisual industries (cross-media) and design sector are emphasized in the new strategy as sectors having the biggest growth potential. According to an interviewee, a study reviewing competitiveness of the CCI sector in Lithuania (to be finished soon), emphasizes the gaming sector, cultural tourism and design sector as the most potential CCI sectors in Lithuania (LT1) [243].

[242] Ministry of Culture of the Republic of Lithuania (2012). Lietuvos Kultūros Politikos Kaitos Gairės. http://www.lrkm.lt/index.php?1767379940

[243] Kultūrinių ir kūrybinių industrijų 2014–2020 metų plėtros strategija. Draft version of the strategy.

Creative cases

In Klaipeda locates the **Art Dock** (Švyturys Art Dock), which is a creative community, and it is based on a privately-led, public private partnership. It provides spaces for cultural and educational activities, interdisciplinary projects and CCI firms. The Art Dock has been used as a model project for finalizing the city's concept for the Klaipeda Cultural Factory (which is a public investment project)[244].

The **Republic of Užupis** (Vilnius) (by City of Vilnius) is a cultural and social phenomenon, a kind of artists' republic. It is a cultural, social and economic model, aiming to stimulate CCIs' development, to create an environment for innovations and to form a platform for creative industries cluster. It provides e.g. creative spaces, art incubator, and spaces for cultural activities. Also, the Vilnius Academy of Arts is located in the area[245] [246].

Creative Partnerships is a creative teaching programme that brings together pupils from 1st to 12th grade, teachers and creative artists, culture and creative sector professionals and scientists. The aim of the programme is to expand and enrich the usual learning process, develop students' and teachers' creativity, and also to promote new learning methods that help develop skills essential for the 21st century labour market. The partnership is an initiative of Ministry of Education and Science. It is implemented by the Education Development Centre and funded by the European Social Fund and state budget[247].

Association **Užupis Creative Cluster** (UCC) is a non-profit limited liability public entity, which has an overall objective to develop a competitive and productive Lithuanian educational simulation games sector in the international market. Also, it aims to increase the UCC simulation game sector's national and international competitiveness and productivity and to run and carry out the social educational simulation games development. In addition, its aim is to develop and commercialize Užupis' professional and creative potential. The UCC is partly funded by the European Regional Development Fund. The cluster has been founded by the Community Building Consultants and five other companies. It has been funded by the Ministry of Economy and the Lithuanian Business Support Agency[248].

http://www.conferencelithuania.eu/index.php/conference-venues/674-vyturys-art-dock.html
http://www.vilnius-tourism.lt/en/tourism/vilnius-for-you/for-art-lovers/republic-of-uzupis/
http://www.kurybinespartnerystes.lt/en.php
http://www.ucc.lt/en/

[244] CITIES project (2011). European Creative cities shared learning. A guide of practice to inform the use of creative and cultural industries as instruments for urban regeneration. Final report.
[245] Creative Metropoles (2010). How to support creative industries. Good practices from European cities.
[246] Vilnius Tourist Information Centre (2015). Republic of Užupis. http://www.vilnius-tourism.lt/en/tourism/vilnius-for-you/for-art-lovers/republic-of-uzupis/
[247] Education Development Centre Lithuania (2012). About project. http://www.kurybinespartnerystes.lt/en.php
[248] Užupis Creative Cluster (2015). Home. http://www.ucc.lt/en/

Poland

In Poland, the copyright-intensive industries contributed to the national GDP with 4,1 % and their share of the total employment was 2,3 % in 2010[249]. The export of creative goods was 2,19 % of the total export and 1,02 % of the total GDP in 2012[250].

The central state administration sets the cultural policy objectives and funding principles in Poland. The Ministry of Culture and National Heritage manages the legislation, searches and secures new sources of non-public funding for culture, oversees the implementation of cultural policy and keeps track of ongoing changes in the system. The Ministry of Culture and National Heritage however does not engage in the direct management of culture[251].

Other ministries involved with the development of cultural and creative industry are the Ministry of Economy (particularly gaming sector), the Ministry of Social Policy (non-governmental organizations), the Ministry of Administration and Digitalization (improving fund-raising and legislation, co-working), the Ministry of Regional Development (Structural funds) and the Ministry of Agriculture (crafts, Structural funds for rural areas). However, according to an interviewee, "*there is lack of coordination [of work] between different ministries*" (PL1).

The National Centre for Culture is a supervisory body and a cultural institution with national status. The objectives of the Centre include cultural education, supporting and popularizing national traditions, promotion of Polish national heritage as an important element of the European cultural heritage, and inspiring and supporting social movements and NGOs active in the field of culture and national heritage. In addition, it provides cultural information and conducts research and expert works in the area of culture and national heritage. The National Centre for Culture is also responsible for implementing the ministerial operational programmes[252]. The Centre is a stand-alone unit operating under the Ministry of Culture and National Heritage. It also develops and professionalizes the cultural sector by raising the qualifications and skills of culture professionals through a variety of trainings conducted by experts as well as through education and exchange programmes[253].

The institutional structure of the cultural sector in Poland is characterized by the relatively large number of state-managed cultural institutions, which are organized or co-organized by the Ministry of Culture and National Heritage. Many of these institutions are responsible for specific fields of culture and acting similarly to non-departmental public bodies[254].

The higher arts education and professional training in Poland is under the administration of the Ministry of Culture and National Heritage. In addition to many universities providing arts and cultural education programmes, there is a large number of fine arts, music and film academies. However, according to an

[249] Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment
[250] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[251] Council of Europe / ERICarts (2012). Country profile. Poland. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[252] Council of Europe / ERICarts (2012). Country profile. Poland. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[253] National Centre for Culture (2014). About us. http://www.en.nck.pl/
[254] Council of Europe / ERICarts (2012). Country profile. Poland. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

interviewed CCI expert, "*educational systems are focusing too much on manufacturing maestros*" [255] (PL1) paying not enough attention to business skills education.

As for the financial support to creative sector, the National Centre for Culture together with the PKPP Lewiatan[256] have initiated the Cultural Sponsorship Code for supporting cultural events. The code is however for guidance only, with no legal force[257] [258]. In addition, the Ministry of Culture and National Heritage has two funds for the support of cultural activities: the Fund for the Promotion of Culture and the Fund for the Promotion of Creative Activity.

Interest towards new funding mechanisms, such as crowdfunding and public-private partnerships, is increasing, but these methods are not yet considered as "*transparent enough*" according to a Polish interviewee. In general, it was pointed out that it is difficult for a creative entrepreneur to find funding and it may require complex organizational structures. In addition, the system for applying funding is very complicated and it is challenging "*to make sure that everything is transparent*" (PL1). There are also grants awarded by ministries to creative artists, but an interviewee argues that in general there is "*lack of trust between grant-givers and appliers*" (PL1).

In the field of support, interest and development organizations, the creative industry in Poland consists of private for-profit companies and non-profit organizations, and public institutions. However, the public sector has an indispensable role in the development and operation of the CCIs. Public agencies or units are also dominating in many cultural activities[259]. The promotion of interests of many CCI sectors is in the responsibility of national institutes (e.g. music and dance, audiovisual, book etc.). The number of professional associations in the CCI sector is quite limited.

The Polish Agency for Enterprise Development (PARP) is a government agency that provides support particularly for small- and medium sized enterprises. In addition to development of entrepreneurship and innovation, and implementation of EU Structural policy, one of the primary areas of operation is the support for companies' export efforts[260].

> "*Businesses don't need special agencies to coordinate them*" (PL1).
>
> "*We have plenty of new organizations and initiatives which are trying to do something for CI. On the other hand we have very old and traditional organizations, but those are not as flexible as the newly established are*" (PL1).

It was noted by an interviewee that there is a high demand for CCI clusters. Clusters could also facilitate financing, assist creative companies in their internationalization efforts and increase small or micro companies' power of influence. This is because particularly micro-companies "*do not have time for*

[255] Maestro means in this case an one-man-company.
[256] Polska Konfederacja Pracodawców Prywatnych Lewiatan i.e. Polish Confederation Lewiatan, which is business organisation representing employers' interests in Poland and in the European Union. Our aim is to support companies' development. See more at http://konfederacjalewiatan.pl/en/about-us
[257] Council of Europe / ERICarts (2012). Country profile. Poland. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[258] Narodowe Centrum Kultury (2011). Kodeks Sponsoringu Kultury. http://kulturasieliczy.pl/sponsoring-kultury/?m=d
[259] Creative Cities (2010). Diagnosis of the creative industries in the Gdansk Metropolitan Area. Final report. http://www.central2013.eu/fileadmin/user_upload/Downloads/outputlib/SWOT_Gdansk_EN.pdf
[260] Polish Agency for Enterprise Development (PARP) (2012). http://en.parp.gov.pl/index/index/1841; http://en.parp.gov.pl/

internationalization" (PL1). Creative clusters could also provide support in case of lacking entrepreneurial skills.

Table 9: Key organizations and networks in Poland in CCI[261] [262] [263]

<table>
<tr><th>GENERAL BUSINESS SERVICES</th><th>EDUCATION AND RESEARCH</th></tr>
<tr><td>Polish Agency for Enterprise Development (PARP);
Polish Information and Foreign Investment Agency;
Fabryka Sztuki (Art Incubator)</td><td rowspan="7">Academy of Business in Dąbrowa Górnicza;
Academy of Fine Arts and Design in Lodz;
Academy of Fine Arts in Gdansk;
Academy of Fine Arts in Katowice;
Academy of Fine Arts in Poznań;
Academy of Fine Arts in Warsaw;
Academy of Fine Arts in Wrocław;
Academy of Music in Bydgoszcz;
Academy of Music in w Cracow;
Aleksander Zelwerowicz State Theatre Academy;
Bialystok University of Technology;
Collegium Civitas;
Cracow University of Technology;
Fryderyk Chopin University of Music;
Gdansk University of Technology;
Grazyna and Kiejstut Bacewicz Academy of Music in Lodz;
Ignacy Jan Paderewski Academy of Music in Poznań;
Jan Matejko Academy of Fine Arts in Cracow;
Karol Lipiński University of Music in Wroclaw;
Karol Szymanowski Academy of Music in Katowice;
Łodz University of Technology;
Ludwik Solski State Drama School;
Maria Curie-Sklodowska University;
Polish National Film, Television and Theatre School;
Poznan University of Technology;
Stanislaw Moniuszko Academy of Music in Gdańsk;
University of Ecology and Management;
University of Warsaw;
Warsaw University of Technology;
Wroclaw University of Technology;</td></tr>
<tr><td>FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES</td></tr>
<tr><td>Ministry of Culture and National Heritage;
Fund for the Promotion of Culture;
Fund for the Promotion of Creative Activity;
Krokus PE;</td></tr>
<tr><td>INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)</td></tr>
<tr><td>National Centre for Culture (governmental);</td></tr>
<tr><td>INTEREST ORGANIZATIONS (SECTOR SPECIFIC)</td></tr>
<tr><td>Zbigniew Raszewski Theatre Institute;
Fryderyk Chopin Institute;
National Audiovisual Institute (governmental);
National Broadcasting Council (governmental);
Polish Book Institute (governmental);
Polish Film Institute (governmental);
Polish Book Chamber;
Polish Performing Artists Union;
Polish Visual Artists Union (ZPAP);
Polish Filmmakers Associations (SFP);
Union of Polish Architects (SARP);
Institute of Music and Dance (governmental);</td></tr>
<tr><td>COPYRIGHT ORGANIZATIONS</td><td>OTHER</td></tr>
<tr><td>Copyright Polska;
Union of Audiovisual Authors and Producers (ZAPA);
Polish Society of the Phonographic Industry (ZPAV);
Polish Society of Authors and Composers (Stowarzyszenie Autorów ZAiKS);</td><td>Polish Association of Creativity (non-profit organization for authors, psychologists-trainers, students, teachers, therapists and university professors);</td></tr>
</table>

National strategies, policies, programmes, action plans and initiatives

- National Development Strategy 2020
- Poland 2030 - Development challenges

As for the policies, the National Development Strategy 2020 points out that the sales of goods and services with added value, created by intellectual property, keep growing constantly and creative industries will soon have the same significance as traditional industries. There are actions, such as building the culture of innovation among entrepreneurs, improving the conditions of exercising IPRs, strengthening and development of business environment for innovation, support for creation of clusters,

[261] Council of Europe / ERICarts (2012). Country profile. Poland. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[262] Perspektywy Education Foundation (2014). Study in Poland. http://www.studyinpoland.pl/en/
[263] FAME (2012). A Qualitative Mapping of Available Financing for European Creative Industry SME's.

developing incentives for increasing innovation (using FDI), eliminating legal barriers restricting innovation and supporting the development of cultural and creative sectors[264].

Furthermore, the Poland 2030 underlines the importance of development of intellectual capital and knowledge-based economy as crucial challenges that Poland needs to address[265].

According to an interviewed expert, CCIs are perceived high on the agenda both on national and regional agenda, but national and regional level policies are still largely in the making (PL1). In particular, Warsaw, Poznan, Wielkopolska Region and Gdynia have been identified as the most creative and attractive locations for CCIs in Poland[266].

Creative cases

Gdynia Design Centre aims to support the development of the CCI. It is targeted to companies from sectors of industrial design, graphic design, multimedia and architecture. It also aims to promote cooperation between designers and entrepreneurs. The centre is also coordinating initiatives and activities involved with design. It participates in international projects and conducts educational activities. The Gdynia Design Centre has been founded by the City of Gdynia[267].

Art_Incubator locates in Fabryka Sztuki (a city culture institution in Łódź). The purpose of the incubator is to bring together creativity and entrepreneurship. Through the Fabryka Sztuki the institution supports creative people to operate on the market and realizes activities to promote arts and professionalization of the creative sector. It has been founded by Łódź Art Center Foundation, Chorea Theatre Association and Łódź City Hall[268].

Zamek Cieszyn is a centre of research and documentation of material culture and design located in Cieszyn. Its primary objective is the development of innovative enterprises by exploiting the potential of design. It organizes design workshops for experienced design experts from Europe and USA. There is the Entrepreneurs Club and range of courses and consultations, in which local businesses are encouraged to participate together with local government, media representatives and designers. The region is promoted also as a tourist destination. The Zamek Cieszyn is a local cultural institution operated by City of Cieszyn and Silesia Province[269].

Filmteractive is an international 2-day event (23-24.9.2015) combining business conference, content market and digital art festival. The aim of the Filmteractive is to create meeting place for filmmakers, directors, artists, marketers and potential investors where they can network and exchange their professional know-how. In addition, it aims to provide information about the possibilities of digital content, interactive video and cross-media formats. The event is organized jointly by the Lodz Media Klaster Foundation, the Polish National School of Film, Television and Theatre in Lodz, and the Digital One interactive agency[270].

http://ppnt.pl/en/centrum-designu/centrum-designu-gdynia
http://www.artinkubator.com/Page#misja_parralax
http://www.zamekcieszyn.pl/pl
http://www.filmteractive.eu/

[264] Ministry of Infrastructure and Development (2012). National Development Strategy 2020 https://www.mir.gov.pl/english/Regional_Development/Development_Policy/NDS_2020/Documents/NDS%202020.pdf
[265] Board of Strategic Advisors to the Prime Minister of Poland (2009).POLAND 2030 – Development challenges http://zds.kprm.gov.pl/sites/default/files/pliki/summary2030.pdf
[266] Creative Regions – Crea.re (2012). Best-of Crea.Re. The Project's final publication with a collection of the most Important public works.
[267] Pomeranian Science and Technology Park Gdynia (PPNT Gdynia) (2015). Gdynia Design Centre. http://ppnt.pl/en/centrum-designu/centrum-designu-gdynia
[268] Fabryka Sztuki W Łodzi (2015). Idea. http://www.artinkubator.com/Page#misja_parralax
[269] Zamek Cieszyn (2011). About us. http://www.zamekcieszyn.pl/en/artykul/projektujemy-mozliwosci-199
[270] Filmteractive (2015). About us. http://filmteractive.eu/filmteractive-about-us/en

Germany

In Germany, the copyright-intensive industries' economic contribution to the national GDP was 4,0 % and their share of the total employment was 3,4 % in 2010[271]. The export of creative goods was 1,62 % of the total export and 0,84 % of the total GDP in 2012[272].

In terms of governmental management over the CCI issues, there is no federal level Ministry of Culture. Instead, there is a Committee on Cultural and Media Affairs, led by the Federal Commissioner (for Cultural and Media Affairs). There is no official body in charge of coordinating cultural policy initiatives, programmes and measures undertaken by the different levels of government. Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany (KMK) acts as a platform for cooperation and exchange of information among the Länder (states)[273].

Levels of public cultural policy include federal, regional and municipal tiers. Currently, there is no general constitutional clause giving the Federal Government responsibility for areas such as culture or education. The Federal Government has however jurisdiction over foreign cultural policy, and also over schools and higher education. In general, the Federal Government, the Länder and the municipalities are largely free to shape cultural policy as they see fit, i.e., to determine the form, extent and priorities of their cultural programmes.

At the federal level, the Ministry for Economic Affairs and Energy and the Ministry of Education and Research are also involved with the development of the CCI sector. The Ministry for Economic Affairs and Energy is however the one who "*holds the main responsibility for the CCIs*" (DE2). The Ministry for Economic Affairs and Energy has, under its Directorate General Innovation, IT and Communications Policy, a separate department for CCIs[274].

> "*And if you take cultural and creative industries, the cultural part can be the Culture Ministry [of the Länder]. So, the culture one is a bit more widely spread. The creative industries is very clearly [the domain of] the Ministry for Economic Affairs*" (DE2).

The Länder are the main public actors concerning the cultural field. They are able to set their own policy priorities, make funding decisions and support projects of regional importance. At the regional level there are Cultural affairs committees in all Länder's parliaments and also Ministries of culture and education. At the municipal level there are also Cultural affairs committees. All of the Länder have their own Parliaments and Parliamentary Committees that deal with cultural affairs and Ministries responsible for culture. At the municipal level, cultural affairs are usually under the responsibility of Cultural Commissioners (Kulturdezernenten)[275].

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[271] Tera Consultants (2014). The economic contribution of the creative industries to EU GDP and employment. Evolution 2008-2011. http://www.teraconsultants.fr/en/issues/The-Economic-Contribution-of-the-Creative-Industries-to-EU-in-GDP-and-Employment
[272] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[273] Council of Europe / ERICarts (2011). Public Bodies Responsible for National Cultural Policy Development. http://www.culturalpolicies.net
[274] Federal Ministry for Economic Affairs and Energy (2015). Tasks and Structure of the Federal Ministry for Economic Affairs and Energy http://www.bmwi.de/EN/Ministry/tasks-and-structure.html
[275] Council of Europe / ERICarts (2013). Country profile. Germany. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

In general, cultural issues are hence in the responsibility of the 16 Bundesländer, but the main efforts in the CCI policy development during the last 5 years have been carried out by the Ministry for Economic Affairs and Energy with its own initiative for CCI (Initiative Kultur- und Kreativwirtschaft; see more in the section on national strategies and programmes) (DE1).

Large regional differences exist in Germany, where the CCIs are "*seen as a topic for urban areas, but CCIs of rural areas are underestimated so far* (DE1)". This might be partly due to the fact that certain states (Länder) have very strong industrial sectors in the fields of e.g. automotive, medical devices and engineering. At the same time, in some cities (e.g. Berlin, Hamburg, Munich) the "*visibility and dynamism of CCIs might have been perceived a bit stronger"* (DE2) than elsewhere.

> "*The industry is strong and the government doesn't want to change it. They want to make sure that certain conditions are okay*" (DE2).

> "*I wouldn't have to think visibility of the creative industry around Berlin"* (DE2).

Higher arts education in Germany is provided by numerous universities, academies of art and music and universities of applied sciences (392 institutions in 2013). Approximately 2/3 of all these educational institutions are maintained by the Länder. However, when the universities of applied sciences are concerned, about half of them are privately maintained[276].

Concerning the provision of higher arts education and whether it meets the needs of the creative sector, an interviewee commented that "*there is no issue here at all. It's safe from the educational side. The sector is very well supported [from viewpoint of educational provision]*." If there is one issue to be named, it is about "*how to keep the graduates here in the region*" (DE2). However, one of the main challenges in the development of the CCI sector is that "*students in the humanities*" (DE2) are not educated well enough from the viewpoint of CCIs. The respective discipline offers should be better anchored in curricula of the educational institutions. According to another interviewee, there is however a need for development in the educational system.

> "*The educational sector does not meet the needs of the creative economy yet. Access to CCI should be part of the university curricula, but teaching staff is quite seldom qualified for that and partly not really interested to train students for a market*" (DE1).

Financing of culture is first and foremost the responsibility of the citizens and their local communities. If the cultural policy task is beyond the community's resources, the state steps in as a sponsor. The municipalities thus bear the lion's share of the cost of funding public cultural activities and institutions. The Federal Government provides only a small share of the total support for culture in Germany[277].

CCIs have access to all existing funding programmes, but according to an interviewee all stakeholders of CCIs "*are not informed enough what kind of opportunities they might have with already existing funding programmes*" (DE1). The availability of funding was named one of the main challenges of the

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[276] Council of Europe / ERICarts (2013). Country profile. Germany. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[277] Council of Europe / ERICarts (2013). Country profile. Germany. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

development of the CCI sector. It is "*always an issue*" because the "*business model and the area in which they work is not so known by the banks and lending institutions*" (DE2).

As for the support and development organizations, in addition to governmental bodies, there are a lot of organizations involved in supporting the cultural work done in Germany. There is also an extensive network of intermediaries or arms-length bodies between the state and the culture scene, which are increasingly used to (by the public cultural affairs administrations) to implement the support programmes or to generate sponsorship for cultural institutions.

> "*Each region here has it's own economic development agency and practically all of them have support services developed for the creative industries on business development, coaching, pitching, all that kind*" (DE2).

The Federal Centre of Excellence for the Culture and Creative industries is a government-led organization, aiming to increase the competitiveness of the creative sector and to improve the employment prospects of innovative small arts organizations, businesses, start-ups, freelance artists and self-employed professionals. The initiative is coordinated by the Federal Ministry for Economic Affairs and Energy and the Federal Government Commissioner for Culture and Media. Other ministries involved are the Ministries of Justice and Consumer Protection, Finance, Labor and Social Affairs, Education and Research, and Foreign Office[278] [279].

Cultural and creative industries are considered to be an important part of the economy and wider economic development, but there is still a need "*to find ways to design this cross-over between traditional industries and creative sectors*" (DE2).

> "*CCI and innovation are not sufficiently linked yet. Partly there is awareness specifically in urban areas that there are strong linkages, but it is not systematically and strategically explored and supported. Institutions responsible for SME support in Germany lack understanding and knowledge how CCI and innovation can unlock economic potential*" (DE1).

Further, the development of the CCIs should be connected with the process of urban renewal. Due to the fact that CCIs are in need of premises and co-working spaces, the urban regeneration process can give an impulse to the CCI sector development. For example, unused industrial properties can be given with low cost flexible business model to the use of CCIs, where they can open up creative, interactive or exhibition spaces etc. In addition, combining the "urban regeneration story" with the development of CCIs, could have an impact in attitudes of politicians and financers towards the CCI sector.

> "*Cities that are most dynamic with respect to creative industries, very often have this element of urban regeneration*" (DE2).

> "*When specific politicians and ministries want to invest, they are still more comfortable investing in bricks and mortar than they are in intangible assets. And when you combine this regeneration story, it's much easier for banks and bureaucrats to understand*" (DE2).

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[278] Bundesministerium für Wirtschaft und Energie (2014). Initiative Kultur- und Kreativwirtschaft der Bundesregierung. http://www.kultur-kreativ-wirtschaft.de/KuK/Navigation/initiative,did=327892.html
[279] Council of Europe / ERICarts (2013). Country profile. Germany. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

Table 10: Key organizations and networks in Germany in CCI[280] [281] [282] [283] [284]

GENERAL BUSINESS SERVICES	COPYRIGHT ORGANIZATIONS
Germany Trade & Invest GTAI (federal economic development agency); Federal Office of Economics and Export Control (BAFA) (export control, foreign trade, promotion of economic development of SMEs, and energy); Betahaus Berlin (incubator, co-working space etc.);	Gesellschaft für musikalische Aufführungs- und mechanische Vervielfältigungsrechte (GEMA); Gesellschaft zur Übernahme und Wahrnehmung von Filmaufführungsrechten mbH (GÜFA); Verwertungsgesellschaft Bild-Kunst Verwertungsgesellschaft Wort; VG Media; Cultural Commons Collecting Society SCE (C3S SCE); Künstlersozialkasse;
FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES	**EDUCATION AND RESEARCH**
Federal „Research and Innovation" Funding Advisory Service; Acton Capital Partners; Arts Fund e.V.; Artists' Social Fund (Künstlersozialkasse); Bertelsmann Digital Media Investments BDMI; Bundesstiftung Baukultur; CREATHOR VENTURE Management GmbH; Cultural Foundation of the Länder; Denkmalschutz; Deutsche Nationalstiftung; Deutsche Stiftung; Deutscher Literaturfonds; Deutscher Übersetzerfonds; Earlybird; Fonds Darstellende Künste; Fonds Soziokultur; German Federal Film Fund (DFFF); Hauptstadtkulturfonds; High-Tech Gruenderfond; Holzbrinck Ventures; i5 Invest; IBB Beteiligungsgesellschaft mbH; Innovationsgutscheine BW; KFW ERP Startfond; KFW Universell; Kizoo AG Technology Ventures; Media Lab GmbH Co.KG; Mercator Foundation; Monkfish Equity GmbH; Seedfonds BW; Stiftung Kunstfonds zur Förderung der zeitgenössischen bildenden Kunst; Stiftung Lesen; Stiftung Preußischer Kulturbesitz; Target Partners GmbH; T-Mobile Venture Funds; T-Online Venture Funds; **INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)** Association of German Artists (Deutscher Künstlerbund e.V.); German Cultural Association (Deutscher Kulturrat); German Cultural Council; German Arts Council; German Federal Cultural Foundation (Kulturstiftung des Bundes);	Academy of Fine Arts in Mainz; Academy of Fine Arts in Munich; Academy of Fine Arts Nuremberg; Academy of Fine Arts Saar Saarbrücken; Academy of Visual Arts Leipzig; Alanus University; Alice Salomon University of Applied Sciences (Berlin); Frankfurt University; Ansbach University of Applied Sciences; Art Academy Berlin-Weissensee; Art Academy Braunschweig; Art Academy Dusseldorf; Art Academy Münster School of Fine Arts; Bauhaus-University Weimar; Berlin University of the Arts; Brandenburgische Technische Universität Cottbus-Senftenberg ; Braunschweig University of Fine Arts; College of Fine Arts (Frankfurt am Main); College of Fine Arts (Hamburg); College of Music and Performing Arts (Stuttgart); European University Viadrina Frankfurt (Oder); University of Applied Sciences and Medical University (Hamburg); Free Class of the Arts Berlin; Free University Berlin; Humboldt University Berlin; Kassel Art Academy; Kiel University; Leuphana University Lüneburg; Mainz University; Muthesius Academy Kiel; Muthesius University University of Applied Art and Design Science (Kiel); Staatl. College of Fine Arts (Städel school) Frankfurt am Main; State Academy of Fine Arts Karlsruhe; State Academy of Fine Arts Stuttgart; State College of Design; University for Media Art, Literary Writing, Pop Music and Sound Art (München); University for the Arts in a Social Environment (Ottersberg); University of Fine Arts Hamburg; University of Giessen; University of Greifswald; University of Hannover; University of Hildesheim; University of Koblenz-Landau;

[280] English translations of names of the organizations provided in the table, if available.
[281] Council of Europe / ERICarts (2013). Country profile. Germany. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[282] Cultural Contact Point Germany (2014). European cultural organizations. http://www.ccp-deutschland.de/287.html
[283] Deutscher Akademischer Austausch Dienst DAAD (2014). Study in Germany. https://www.study-in.de/en/
[284] FAME (2012). A Qualitative Mapping of Available Financing for European Creative Industry SME's.

	University of Marburg; University of Regensburg; University of the Arts Bremen; Culture Industries Research (Kulturwirtschaftsforschung KWF); RKW Kompetenzzentrum (non-profit research and development organization);
INTEREST ORGANIZATIONS (SECTOR SPECIFIC)	**OTHER**
Arbeitsgemeinschaft Deutscher Kunstvereine (ADKV); Arbeitskreis selbständiger Kultur-Institute e.V. (AsKI); Berufsverband Handwerk Kunst Design e.V.; Bundesverband Bildender Künstlerinnen und Künstler (BBK); Bundesverband der Jugendkunstschulen und Kulturpädagogischen Einrichtungen; Bundesverband des Deutschen Kunst- und Antiquitätenhandels e.V. (BDKA); Bundesverband Deutscher Galerien und Kunsthändler e.V.; Bundesverband Deutscher Kunstversteigerer (BDK); Deutscher Bühnenverein (DBV); Deutscher Kunsthandelsverband (DK); Deutscher Musikrat; Federal Association of Visual Artists (Bundesverband Bildender Künstler BBK); Gemeinschaft Deutscher und Oesterreichischer Künstlerinnenvereine aller Kunstgattungen (GEDOK); Film Promotion Agency (FFA) (governmental); German Music Information Centre (Deutsches Musikinformationszentrum MIZ) Kulturpolitische Gesellschaft e. V. (KuPoGe); Tanzplan Deutschland e.V.; Verband der Restauratoren e.V. (VDR); Verband Deutscher Antiquare e.V. (VDA); Verband unabhängiger Kunstsachverständiger e.V. (VUKS);	Hamburg Kreativ Gesellschaft mbH (municipal, promoting creative industries); Medien- und Filmgesellschaft Baden-Württemberg mbH (MFG) (state-owned, expert organization, media and creative industries); Federal Government Centre of Excellence for the Culture and Creative Industries; German Association of Innovation, Technology and Business Incubation Centres ADT (Arbeitsgemeinschaft Deutscher Innovations-, Technologie-, und Gründerzentren e.V.): German Federal Enterprise for International Cooperation (Deutsche Gesellschaft für Internationale Zusammenarbeit GIZ GmbH);

National strategies, policies, programmes, action plans and initiatives

- The Culture and Media Policy of the German Federal Government
- The Cultural and Creative Industries Initiative of the Federal Government

As for the current policies created for support of development of the CCI sector, there are differences between Länder and between urban and rural areas. For example, Berlin has particular interests towards the CCIs and has even its own initiative for the support of ICT, media and creative sector, while there are also regions where "*basically there isn't any policy for the creative industries*" (DE2). At the federal level, Culture and Media Policy of the German Federal Government acknowledges that the CCIs are among the strongest growth industries of the German economy and CCIs will continue to offer great opportunities for further economic growth and employment[285].

The Federal Government Initiative for Cultural and Creative Industries is a federal-level platform for providing information, advisory and networking services for the CCIs. The Initiative is operated by the Federal Government's Centre of Excellence for the Cultural and Creative Industries. The Centre's website serves as an information guide on the services, advice and support programmes available to creative professionals. In addition, it aims to provide practical assistance to start-ups and young talent. The Centre

[285] German Federal Government (2012). The Culture and Media Policy of the German Federal Government http://www.bundesregierung.de/ContentArchiv/EN/Archiv17/_Anlagen/2012-10-17-im-bund-mit-der-kultur-bkm-eng.pdf?__blob=publicationFile&v=3

also aims to improve access to existing government support programmes, to promote advanced education and training, and in this way to optimize market opportunities for creative professionals and facilitate their access to international markets[286]. According to the interviewees, the Initiative was considered as an important tool of support for the CCIs.

> "*It conducts studies, implements awareness raising campaigns and offers contact points which organize further education of all kinds. On regional level there are some incubator centers which work with funding from regional governments*" (DE1).

> "*Yes, policies exist at the federal level. At some regional levels – policies exists also. For example in Nord Rhein Westphalia and Bayern. However, in some other regions, including ours, there is no one specific policy. There are innovation policy documents, regional development policy documents that refer to the role and importance of CIs but there is no specific policy directed at CIs*" (DE2).

> "*[In the future], there is a need for more strategic and networked approach, more developed financing instruments and awareness raising activities in order to link cultural and creative industries and innovation" (DE1).*

[286] Bundesministerium für Wirtschaft und Energie (2015). Initiative Kultur- und Kreativ wirtschaft der Bundesregierung. http://www.kultur-kreativ-wirtschaft.de/

Creative cases

Design Reaktor Berlin is a multi-disciplinary research project of the Universität der Künste Berlin (UdK) / Berlin University of the Arts. The aim is to encourage SMEs and designers to have innovative cooperation together. There are workshops for producing and exploring product ideas, of the potential which is assessed by a panel of experts and developed further in cooperation with the companies concerned. It aims to improve the efficiency of the product development process and enhance the product's identity. In addition, there are professional discussions about strategies for marketing, communications and distribution[287].

Betahaus (Berlin) is a co-working space and a platform for knowledge- and creativity-based workers. It can be used on working 24/7, networking and joint innovating. It provides interdisciplinary approach, international cooperation with other co-working spaces abroad, digitally networked collaborative workplace and low-cost infrastructure for start-ups in all creative sectors[288]. There are meeting rooms, an event space, a prototype laboratory, a space for pitching events, a break out area, a coffee shop and a workshop. It is possible to exhibit, test and develop further new ideas and prototypes. In addition to Berlin, it has spaces in Hamburg, Sofia and Barcelona. The Betahaus has been founded by 6 students and it operates as a limited liability company (GmbH)[289].

Project Zukunft is an initiative of the Berlin´s Senate Department for Economics, Technology and Research. The aim is to support the growth areas of ICT, media and creative economy. The purpose of the initiative is to develop strategies for Berlin as a location, to set up platforms, to create networks for the digital and creative economy, to increase inter-sectoral communication, to develop new support instruments and compile studies[290].

KMU-Kreativ initiative (by Thüringer Agentur für die Kreativwirtschaft) aims to promote cross-industrial cooperation between CCIs and SMEs, and by this way increase the demand for CCI products and services, instigate innovation projects and raise the productivity in general. The primary target group is SMEs with no business dealings with CCI yet. The initiative provides funded and customized consultation on potentials in the company. In addition, if there will be innovation projects initiated as a result of the KMU-Kreativ, they could be eligible for innovation funding support[291].

http://design-reaktor.de/
http://www.betahaus.com/berlin/
http://www.berlin.de/projektzukunft/en/
http://www.kmu-kreativ.de/introduction/

[287] The Design Reaktor Berlin (2015). Concept. http://design-reaktor.de/konzept_en.html
[288] Creative Metropoles (2010). How to support creative industries. Good practices from European cities.
[289] Betahaus GmbH (2013). http://www.betahaus.com/berlin/story/
[290] Senate Department for Economics, Technology and Research (2014). Creative Industries. http://www.berlin.de/projektzukunft/en/creative-industries/
[291] Thüringer Agentur für die Kreativwirtschaft (2015). KMU-Kreativ. http://www.kmu-kreativ.de/introduction/

Russia

In Russia, the economic contribution of copyright-based industries to GDP was 6,06 % and their contribution to employment 7,30 % in 2007[292]. The export of creative goods was 0,27 % of the total export and 0,08 % of the total GDP in 2012[293].

In the policy making in the CCI sector, the state is the main cultural policy player. The President appoints the Minister of Culture (Министр Культуры), formulates principles and priorities of national policies and also appoints the members of the advisory body called Council on Culture and the Arts of the Russian President (Совет при Президенте по культуре и искусству). The Council is to inform the head of the state on cultural and artistic affairs, to provide for interaction with the creative community and cultural organizations, and to assist in the elaboration of the state policy in culture and the arts. The Council also proposes nominees for state awards in literature and the arts, and in humane activities.

The State Duma (Государственная Дума, нижняя палата парламента) and the Council of Federation (Совет Федерации, верхняя палата парламента) constitute the Federal Assembly of the Russian Federation (Федеральное собрание Российской Федерации, парламент) that influences federal cultural policy by elaborating and passing federal legislation to cultural sector and adopting the federal budget drafted by the government. In the Council of the Federation, there is the Committee on Science, Education and Culture, and the advisory Council for State Cultural Policies of the Chairman of the Federal Assembly (Совет по государственной культурной политике при Председателе Совета Федерации), which analyze policy issues. Further, in the Duma, there is the Committee for culture (Комитет Государственной Думы по культуре), which has "*a major role when developing these [new policies and programs]*" (RU2), and the Culture council of the Chairman of the State Duma, which supports the elaboration of legislation in the cultural field. The State Duma members (in cooperation with the Ministry of Culture) lobby interests and needs of the cultural sector.

At the ministry level, the Ministry of Culture holds the main responsibility of the CCI policy development. The Culture Council (Совет по культуре) supports the elaboration of legislation in the cultural field. Further, the Coordinating Council for Culture and Arts of the Ministry of Culture (Координационный совет по культуре при Министерстве культуры Российской Федерации) acts as a consultative body presided by the Culture Minister. It provides matching actions of executive authorities at both federal and regional levels. The heads of regional cultural administrations are members of the Coordinating Council for Culture and Arts. This Council is a platform for federal and regional decision-makers to improve and develop the national policy-making process. Finally, the Ministry of Culture provides regulations, manages state property and delivers state services concerned with culture, arts, cultural heritage, film, archives, authors' rights and tourism. In general, state cultural policies are still oriented on managing property and institutional networks without regulating the cultural sector as a whole[294].

Professional higher education in the arts is based on the principles of discovering gifted children, continuous education, and early professionalization. There is an extensive network of state music, ballet

[292] World Intellectual Property Organization (2012). WIPO studies on the economic contribution of the copyright industries. Overview.
[293] United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en
[294] Council of Europe / ERICarts (2013). Country profile. Russia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

and fine arts higher education institutions, conservatories and academies (260 professional colleges and 68 higher educational institutions of culture and the arts in 2009), in addition to the private ones. State educational settings are mostly funded by regional governments or by local administrations[295]. According to an interviewee, the arts education should include for example project management or "*project thinking*" (RU3), in order to prepare students to use their knowhow in practice.

> "*Here I could say that art education in Russia is primarily in Universities and it is very general. There are several programs in different levels: arts management, cultural management, but they are in the very beginning. We have very good, wide, deep education, but it is far from the British*" (RU1).

> "*We are training for professions without understanding of needs and possibilities, which are in other sectors*" (RU2).

> "*We still face the need to transform the academic knowledge to market needs. The education should prepare the students to be able to use the knowledge in practice*" (RU3).

Apart from the educational institutions, the Creative Industries Agency (based in Moscow) has the Creative Entrepreneurs School –project, which aims to provide practical assistance to startups within the creative industries in the stage of project launching and business development[296].

For the funding of culture there are Federal Target Programmes (FTPs) (e.g. the "Culture of Russia"), which serve as particular financial instruments to accumulate funding for special needs or activities. There is also a system of state grant-giving, which is used to support for example the most prominent cultural institutions, higher educational institutions, companies, orchestras and their activities. Presidential, state and ministerial grants and grants on behalf of the head of the territories are used in order to create opportunities to support proficient artists and aesthetic innovations. State grants and awards are given to well established and more renowned institutions, prominent artists and companies in order to support high quality productions. In addition, there are subsidies for the support of Artists' Unions provided by the Ministry of Culture. Also, the professional Artists' Unions provide relevant forms of support to their members, in order to join professionals and to lobby for professional interests, to promote arts and to support the younger and older members[297]. There are also private foundations providing grants. However, the focus in most funding instruments is on culture and arts while the business (CCI) perspective is largely neglected. Thus, there are scarce opportunities to receive funding for CCIs.

> "*Most of support comes from private foundations. I would name Potanin Foundation and Prokhorov Foundation*" (RU3).

Also the field of CCI support and interest organizations is quite limited, compared to many other countries in the NDPC area. There are unions and associations e.g. for film-makers, theatre workers, antique dealers, designers and authors. The number of professional organizations and associations is quite high in film industry and almost none in the music, games, multimedia, IT and fashion industries. The network structures in certain CCI sectors are considered weak and absence of professional associations and

[295] Council of Europe / ERICarts (2013). Country profile. Russia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[296] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.
[297] Council of Europe / ERICarts (2013). Country profile. Russia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

communities that have common professional features creates challenges for the development of the creative industries. Another challenge is the lack of creative business-incubators in Russia that have only recently started to emerge[298].

> "*It would be good to establish some scheme … how to support CIs and creative entrepreneurs. They do not have resources. They don't know where to apply for support*" (RU2).

At the regional level, the CCIs have in some cases been given more emphasis. For example the city of St. Petersburg is aiming to establish creative clusters, which provide services related to creative activities. In order to boost creative industries, particularly involved with the cultural tourism, the city's Committee for Investment has designed the Concept of Establishing a Creative Cluster by 2020. The main objective of the Concept is to define a coherent and unified approach to establishing the Cluster. The cluster approach has been selected, because this will reduce the risks and therefore increase the investment attractiveness of the creative sector, and hence attract more private investments in to the sector. The cluster in this case is "an association of enterprises, suppliers of equipment or services, R&D or educational organizations interrelated, due to territorial proximity and functional interdependence, in the sphere of production and sales of goods and services"[299].

[298] Elena Zelentsova & Elena Melvil (2011). Creative Industries Russian profile. Creative Compass Project Publication. Institute for Russia and Eastern Europe.
[299] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.

Table 11: Key organizations and networks in Russia in CCI[300] [301]

<table>
<tr><th>GENERAL BUSINESS SERVICES</th><th>COPYRIGHT ORGANIZATIONS</th></tr>
<tr><td>Russian Agency for Small and Medium Business Support (SIORA) (government agency);
Craft & Design Business Incubator;
Skolkovo Business Incubator;
Kvartal Business Incubator;</td><td>Russian Authors' Society (RAO)
Russian Organization for Intellectual Property (VOIS)</td></tr>
<tr><th>FINANCIAL SUPPORT, FUNDING, GRANT GIVING BODIES</th><th>EDUCATION AND RESEARCH</th></tr>
<tr><td>Vladimir Potanin Foundation;
Mikhail Prokhorov Foundation;</td><td rowspan="3">Moscow Institute of Arts,
Moscow State University of Design and Technology;
Moscow State University of Printing Arts;
Moscow Technical University of Communication and Informatics;
Moscow University of Humanities;
Saint-Petersburg State Theatre Arts Academy;
Saint-Petersburg State University of Cinematography and Television;
Saint-Petersburg State University of Humanities and Social Sciences;
Saint-Petersburg State University of Service and Economics;
Saint-Petersburg State University of Technology and Design;
Sholokhov Moscow State University for Humanities;
St. Petersburg State Conservatory;
State Specialized Institute of Arts (Moscow);

Institute for Cultural Programs (ICP) (St. Petersburg) (governmental; cultural and educational organization);
Leontief Centre for Social and Economic Research (research organization);</td></tr>
<tr><th>INTEREST ORGANIZATIONS (HORIZONTAL LEVEL)</th></tr>
<tr><td>Russian Cultural Foundation;
Federal State Cultural Institution;
Creative Industries Agency Moscow;
St. Petersburg Centre for Creative Industries Support;</td></tr>
<tr><th>INTEREST ORGANIZATIONS (SECTOR SPECIFIC)</th><th>OTHER</th></tr>
<tr><td>Film Producers Guild of Russia;
Filmmakers' Union of the Russia;
Guild of Press Publishers (GIPP);
MediaUnion;
Publishers Association of Russia;
Russian Antique Dealers Union;
Russian Association of Communication Agencies (AKAR);
Russian Authors' Society;
Russian Designer Union;
Russian Union of Journalists;
The Union of Theatre Workers of the Russian Federation;
Theatre Union of the Russian Federation (STD);</td><td>ARTPLAY Design Centre (art cluster);
Centre of Cultural Initiatives of New Moscow;
Cultural Policy Institute Moscow (independent agency; project development, research, consultancy);
Etagi (cultural center)
Flakon-zavod (creative cluster)
Pushkinskaya 10 (art center)
Tkachi (creative cluster)</td></tr>
</table>

National strategies, policies, programmes, action plans and initiatives

- State Programme of the Russian Federation on Development of Culture and Tourism for the period of 2013-2020

There are currently very few cultural or creative industry policies in Russia. In general, from the viewpoint of CCI policy development, "*the creative economy concept is still definitely not understood*" (RU2). However, there are expectations for the year 2015, when "*the Moscow government for the first time begins to develop this theme and to elaborate programs of support for the creative industries development*" (RU1).

[300] Council of Europe / ERICarts (2013). Country profile. Russia. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php
[301] Ministry of Education and Sciences of Russia (2013). Education in Russia for Foreigners. http://en.russia.edu.ru/

The State Programme on development of culture and tourism has three objectives. First, preserving cultural and historical heritage and ensuring that items of cultural value are accessible and that people are able to participate in cultural life, thereby unlocking the nation's creativity. Second, improving the quality and availability of services in tourism. Third, creating a favorable environment for the sustainable development of culture and tourism[302].

> "*At the moment these policies face lack of support from local communities and other governmental bodies that do not deal with culture issues*" (RU3).

> "*Let's say that our economy and our policies are not oriented on the creative sector*" (RU1).

> "*In Moscow there is a Department of culture that implements a cultural policy and a lot of work has been done so far. However it is far too early to talk about systemic actions in the field [CCI policy development]*" (RU3).

As outlined by the State Programme, the cultural tourism can be part of the development of the CCI sector in the future. For the culture and tourism, "*there are now new programs to develop this*" and "*budget money is going to be invested in the development of it [tourism]*" (RU2).

> "*More government support is needed, also there must be bottom-up initiative which is quite weak at the moment, or most of the times we can even see the aggression of population towards any innovations in culture. So, a lot of educational work, a lot of networking should be done to run policies efficiently*" (RU3).

> "*It has started to get better, it was shown that even at ministry level there is huge interest towards creative industries. Now they claim, that it is important for the country, but before recent times, there weren't development programs for CCIs. At the Federal level, CCI development is so very new*" (RU2).

Apart from the national policies, there are however policies compiled for city level. For example, in the Concept of Social and Economic Development of the city of St. Petersburg until 2020 creative industries are recognized as "the main driving force for the global image of St Petersburg as one of the most significant cities in the world, both in cultural and political terms". Promotion of creative industries and innovation in arts has been set one of the priorities in the city's cultural development[303]. Also the city of Moscow is currently actively promoting the emergence of creative clusters and turning former industrial buildings into creative hubs.

[302] The Russian Government (2012). State Programme: Culture and Tourism Development, 2013-2020. http://government.ru/en/docs/3353/
[303] Institute for Cultural Programs (2013). Development of financing and legislation in creative industries of the Northern Dimension. St. Petersburg, Russia.

Creative cases

Creative Entrepreneur School, operated by the Creative Industries Agency (Moscow), is a distance education program. It is actually a platform for communication and education. The school aims to give practical aid when launching new projects in the creative industries. It is targeted for those who are initiating their own creative projects or starting their own business or for those who have ideas ready for implementation[304].

Moscow School of Social and Economic Sciences has a faculty of **Socio-Cultural Project Management**, which is an educational platform with a specialized track also for creative industries. The Faculty is a combination of an educational institute and a laboratory. Teaching method is project-based and courses are validated by the University of Manchester. The students receive a Russian state diploma and a Master of Arts degree in Cultural Management from the University of Manchester[305].

Institute for Cultural Programs (ICP) is a culture and education organization established by the St. Petersburg Committee for Culture of the St. Petersburg City Government in 1993. ICP's mission is to promote and market St. Petersburg culture and arts, with the purpose of implementing the city's cultural policy. It functions as an arts and culture information center, conducts cultural research and expert assessments as well as offers continuing education for cultural institutions. ICP also develops and coordinates local, regional, federal and international programs on CCIs[306.]

Design center **ARTPLAY** is a creative cluster that unites architects, engineers, designers, constructors, and furniture, light, ceramics and special equipment suppliers. It also hosts the British Higher School of Arts and Design, arts exhibitions and galleries. Currently, it occupies an area of 75 000 square meters consisting of exhibition spaces, show-rooms and offices of 300 companies located in former industrial spaces in the center of Moscow. Artplay is a privately owned company and it offers also project management services[307].

Loft Project **ETAGI** constitutes itself as a cultural center, pioneer in loft design and a large exhibition space. There are art galleries, design rooms, lectures and discussions on art and design, film screenings, theatrical performances, classes on curating and workshops for children. It is also involved with international projects of contemporary art in association with various cultural institutions in the EU. The ETAGI was founded by two private persons[308].

http://www.creativeindustries.ru/eng/projects/distance_education
http://www.msses.ru/en/about/faculties/918/
http://www.spbicp.ru
http://www.artplay.ru/about
http://www.loftprojectetagi.ru/en/

[304] Creative Industries Agency (2014) Creative entrepreneur school. http://www.creativeindustries.ru/eng/projects/distance_education
[305] Moscow School of Social and Economic Sciences (2015). Socio-Cultural Project Management. Description. http://www.msses.ru/en/about/faculties/918/
[306] Institute for Cultural Programs (2015). Profile. http://www.spbicp.ru/content2
[307] ARTPLAY Центр дизайна (2015). Управление проектами. http://www.artplay.ru/about
[308] Loft Project ETAGI (2015). Loft Project ETAGI. http://www.loftprojectetagi.ru/en/

5. THE ROLE OF THE NDPC IN CCI POLICY DEVELOPMENT IN THE ND AREA

The importance of international networks and cooperation platforms was highlighted in most of the expert interviews carried out for this study. On the one hand, it was acknowledged that there are quite many transnational networks, bodies, initiatives and partnerships operating within the ND area aiming to support the development or enhance the operational conditions of the CCI sector and to increase international cooperation at various levels in the field. In addition to the NDPC, they include, for example, the Nordic Council of Ministers' initiatives (e.g. Kreanord), the EU Strategy for the Baltic Sea Region (Priority Area Culture), and ARS BALTICA. The role and primary goals of the NDPC in this larger frame of reference have thus far remained blurred to CCI operators at all levels. This is acknowledged also within the NDPC secretariat and the NDPC steering committee. On the other hand, the basic rationale of connecting the policy makers, operators and companies from 11 countries – including the non-EU countries Russia, Norway and Iceland – through the activities of the NDPC was considered a worthy effort by the interviewees. However, focusing of activities on certain priority areas is needed to make a real impact.

> "*I think this is the key role that the NDPC could have and that was from the very beginning the idea that it helps to build those networks and clusters within the NDPC area. […] If it tries to do everything in every field, it is going to be a very insignificant player*" (EST2).

Concentration on selected priority areas of action would allow the development of more focused and concrete activities and help determine the NDPC's target groups more carefully. This would be necessary also due to the limited financial and human resources of the NDPC. The secretariat comprises of one person while the other NDPC actors (e.g. steering committee members and experts) have their regular jobs and can spend only a limited amount of time on NDPC issues.

Determining the priority areas is not necessarily easy in such a heterogeneous context where the NDPC operates. The ND countries are at very different stages of development concerning the CCIs in general. Thus, it is clear, that the different nation states may have competing priorities that they wish to enhance. However, based on the review of the policy documents of the ND countries, there are several areas where the interests collide including at least the following:

- Development of a favorable business environment for CCIs
- Raising awareness about the role of CCIs for national economies (e.g. through more detailed research about CCIs)
- Fostering cross-sector as well as within sector cooperation and innovation (e.g. through more efficient use of design in other sectors; development of cultural tourism; clustering of CCIs both within the sector and with other sectors)
- Role of CCIs in regional development
- Improving the access of CCIs to existing funding sources and development of new funding mechanisms
- Digitalization and IPR
- Improving the business skills of creative entrepreneurs and the creative skills of all the people (e.g. through development of education programs)
- Fostering internationalization and growth of CCIs

The concrete means how each country has responded to or aims to tackle e.g. the above listed issues varies considerably. Exchange of experiences, challenges, solutions and best practices is important for both policy makers, developers of CCIs, and CCI companies. There is a lot to learn from each other within the ND area but it is also important to look outside the region. For example, Great Britain and the Netherlands are often referred to as the countries where CCIs have developed well and innovative solutions have been designed to suit their needs. Nevertheless, it is equally important to remember that creativity and innovation have a strong regional dimension. Due to this, policies and support instruments should be determined locally, building on local specificities, assets and resources[309]. Therefore, also the best practices developed in other contexts need to be adapted to the local conditions.

> "*I think that some countries are good to giving solutions to one problem and maybe other countries are good to give solutions to other kind of problems*" (DK1).

Furthermore, the decision about the priority areas of the NDPC should not be done in isolation from the CCI operators. In particular, those stakeholders that are considered as the target group of NDPC's future activities need to be involved in the process. For example, KreaNord was criticized by some of the interviewees of not engaging in dialogue with the CCI operators right from the beginning of its operations, which would have built the commitment of the CCI operators in the work of KreaNord. In 2011 KreaNord underwent the first external evaluation and it was then encouraged to define, narrow down and clarify the purpose of the project, its priorities and the roles of the participants. Further, it was urged to specify how goals, focus areas, activities, outputs and impacts are linked together to contribute to the overall purpose[310]. The final evaluation of KreaNord's activities will be available by summer 2015. Both of these evaluation reports could be utilized in the development of NDPC's operations.

> *"I think a typical flaw in all the Nordic and other cross-border projects is that you first make a political decision about the focus area and then you start feeding it to the people"(FI2).*

In most of the countries within the ND area at least two ministries are involved in CCI policy development. Typically they include at least a ministry responsible for culture and a ministry responsible for the business environment. Often they approach the CCIs from very different perspectives which can be turned into a benefit if their cooperation functions smoothly. Bringing these two parties around the same table was considered as one of the advantages of KreaNord. The NDPC has thus far focused mainly on cultural ministries but fostering the interministerial cooperation also within the framework of the NDPC would certainly seem meaningful.

NDPC is not meant to be a project implementing organization but rather a facilitator of projects that contribute to the CCI development in the ND area. One of the means utilized so far, has been the project funding mechanism of the NDPC. The partnership has been financing selected projects within the CCIs having a cross-border character. However, as a mere financier of projects, the partnership has somewhat limited possibilities to impact what kind of project applications it receives, how much visibility it gets through the project activities and what is eventually accomplished in the projects. By taking a more active role in project initiation, the partnership could have better chances to realize its strategic objectives in CCI development as well as raise its visibility and actors' awareness of its activities. This could be done

[309] See e.g. European Commission (2010). Green Paper - Unlocking the potential of cultural and creative industries. Brussels. COM(2010) 183.
[310] Kontigo AB (2011). Evaluering av KreaNord. En kvalitativ utvärdering av KreaNords verksamhet med fokus på organisation, politik och kvalitet. Stockholm.

e.g. through more detailed funding calls with a predetermined topic/question that the applicants are invited to address in their proposals. The NDPC funding could also be used as seed money for preparing larger scale projects targeted to Creative Europe, Baltic Sea Region Programme, ENI funding, Horizon2020 or other funding bodies with a transnational focus. In such a case, the number of funded projects could be cut down allowing to increase the monetary contribution granted per project. This would require well-planned program focusing on the needs of the creative entrepreneurs and actions needed from the policy makers.

The NDPC has also been organizing forums, workshops and other events in various locations within the ND area. Such events are very important both from knowledge sharing and networking perspectives. They also raise awareness about the NDPC and the CCIs in general. For that purpose, establishing a larger annual event with focused contents addressed to the NDPC's stakeholders could be welcome. The events should be planned and organized in cooperation with the CCI operators and other relevant cooperation partners at different levels. Within the Northern Dimension, the relevant cooperation partners would include the ND Business Council and the Northern Dimension Institute. Also the EUSBSR PA Culture and Nordic Council of Ministers would be natural partners. In addition, national (e.g. Creative Estonia, CKO, Creative Industries Finland) and regional (e.g. Institute for Cultural Programs, Creative Industries Agency Moscow) level operators need also be involved.

Furthermore, the events could be utilized more effectively also in illustrating and showcasing in practice the value of more creative approaches. This could be done e.g. by implementing World Cafés or other types of interactive sessions facilitated by CCIs. Providing CCI projects, intermediaries and networks the opportunity to present themselves in exhibition stands would both raise their visibility and give the other event participants a better chance to explore what they are doing.

One alternative could be to partner with already established platforms and events. For example, the Creative Business Cup (CBC) has become a large-scale event gathering creative entrepreneurs from all over the world. NDPC has also been supporting the CBC and the participation of Russian entrepreneurs in it. However, as a mere financier NDPC is not able to either utilize the event in promoting itself as a CCI actor or help creative entrepreneurs from the ND to take the most out of it. In order to better utilize the CBC or any other existing platform, the NDPC should have a clear vision of what it wants to achieve from and what it has to offer to that specific audience.

NDPC has also financed studies – such as this – on various topics to increase the knowledge base of CCIs within the ND area. This is an important activity but the future studies should be based on real information needs and they should also be followed by action, e.g. a pilot project where the results are utilized in practice. Clearly, there continues to be a lack of analytical information concerning the CCIs within the region despite the fact that numerous reports have been produced on creative industries in various countries. The national statistics are not comparable and data is published with a considerable lag. Some countries are monitoring the development of the sector e.g. once in every three year while e.g. in Russia, it is difficult to get any relevant statistical information on CCIs. The interviewees often pointed to the fact that it is (still) difficult to justify the need to develop CCIs when there are no figures to back up the claim. In particular, the value added of CCI to other economic sectors is very difficult to measure.

To conclude, this is the time for the NDPC to engage in dialogue with CCI operators in the ND area to determine its future focus areas of activities. The legal and administrative organization process of the

NDPC has taken quite some time but is expected to be settled shortly. The legal agreement setting the foundations for the operations of the NDPC secretariat is currently under preparation and once signed, will provide the secretariat with a more solid funding basis. It will also leave more room for actual content development.

APPENDIX 1: Export and import of creative goods

Picture 1: Export and import of all creative goods, USD millions, current prices, current exchange rates[311].

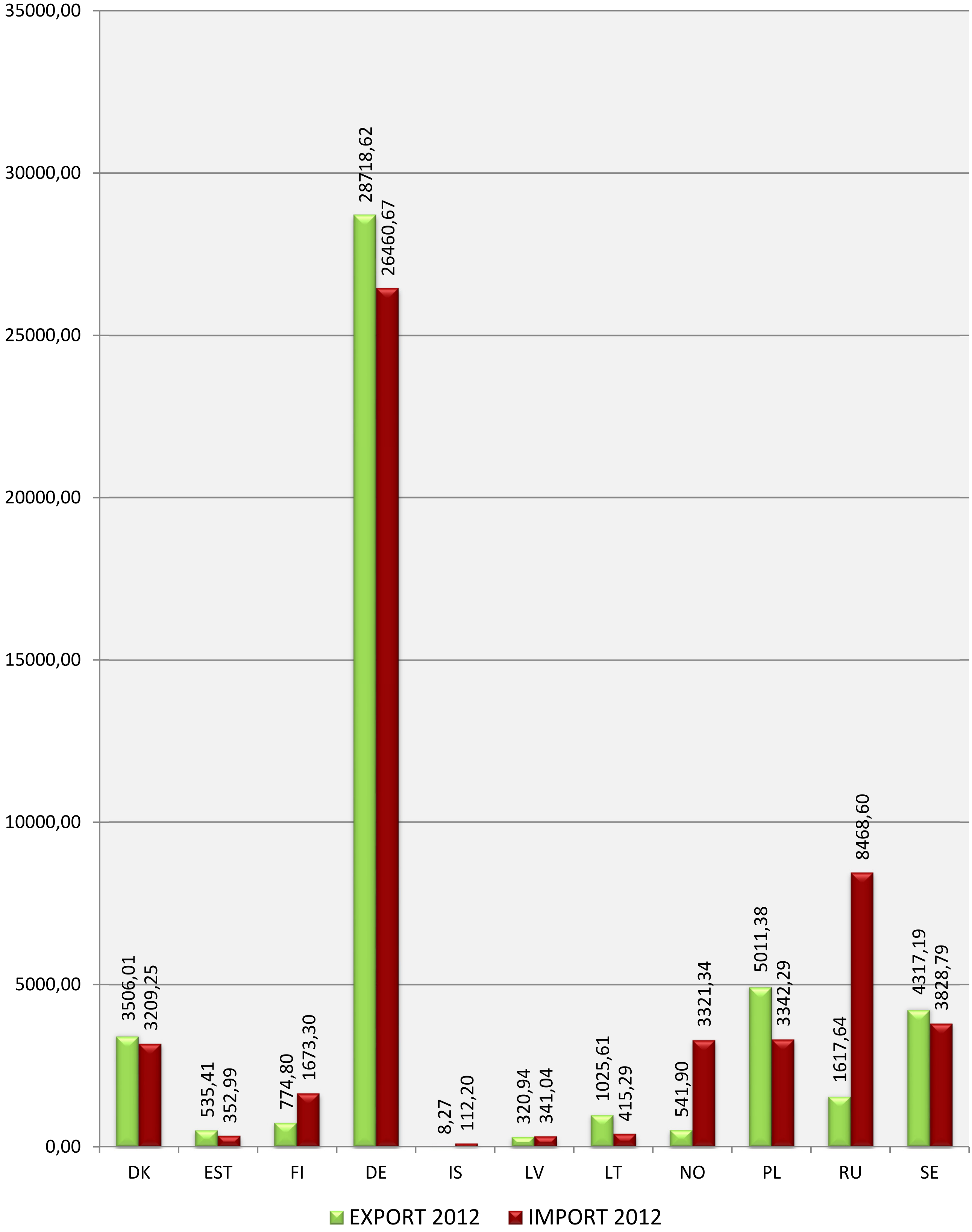

Table 23: Values and shares of creative goods, exports, annual, 2012[312] [313]

EXPORT 2012	DK	EST	FI	DE	IS	LV	LT	NO	PL	RU	SE
Art Crafts	5,2 %	7,6 %	3,3 %	3,8 %	0,8 %	11,4 %	3,2 %	1,3 %	4,4 %	2,2 %	3,0 %
Audio Visuals	6,0 %	2,8 %	8,1 %	15,8 %	6,4 %	3,8 %	2,5 %	6,8 %	10,1 %	8,3 %	19,7 %
Design	**73,2 %**	**66,5 %**	31,7 %	**46,7 %**	34,0 %	**51,7 %**	**83,8 %**	**35,3 %**	**63,2 %**	28,8 %	**41,5 %**
New Media	3,6 %	1,1 %	14,2 %	9,7 %	1,8 %	3,1 %	1,4 %	12,1 %	6,3 %	3,3 %	4,1 %
Performing Arts	0,4 %	0,5 %	0,2 %	1,9 %	0,1 %	0,3 %	0,1 %	0,2 %	0,3 %	0,2 %	0,8 %
Publishing	8,2 %	19,6 %	**41,5 %**	16,3 %	18,2 %	29,2 %	8,0 %	13,8 %	13,7 %	**55,4 %**	29,2 %
Visual Arts	3,4 %	2,0 %	1,0 %	5,8 %	**38,7 %**	0,5 %	1,1 %	30,4 %	1,9 %	1,8 %	1,7 %

Table 24: Values and shares of creative goods, imports, annual, 2012

IMPORT 2012	DK	EST	FI	DE	IS	LV	LT	NO	PL	RU	SE
Art Crafts	5,9 %	9,0 %	5,4 %	6,1 %	5,5 %	9,8 %	11,2 %	4,6 %	10,7 %	6,5 %	6,2 %
Audio Visuals	11,3 %	5,9 %	11,5 %	9,7 %	10,7 %	6,1 %	4,6 %	11,0 %	7,9 %	2,6 %	14,0 %
Design	**56,8 %**	**68,7 %**	**53,2 %**	**55,6 %**	**53,1 %**	**63,1 %**	**68,5 %**	**55,6 %**	**53,9 %**	**71,6 %**	**55,7 %**
New Media	7,0 %	6,1 %	12,2 %	11,9 %	5,6 %	8,9 %	6,1 %	4,7 %	16,4 %	8,0 %	10,0 %
Performing Arts	1,0 %	0,6 %	1,4 %	2,1 %	1,8 %	1,0 %	0,7 %	1,4 %	1,0 %	1,2 %	1,2 %
Publishing	14,7 %	7,9 %	14,4 %	9,5 %	19,6 %	9,2 %	7,0 %	18,1 %	8,2 %	8,4 %	10,5 %
Visual Arts	3,3 %	1,8 %	1,9 %	5,2 %	3,7 %	1,9 %	1,9 %	4,6 %	1,8 %	1,7 %	2,5 %

Table 25: Total GDP, total export, export of creative goods[314]

2012	GDP*	TOTAL EXPORT*	EXPORT of CREATIVE GOODS*	EXPORT of CREATIVE GOODS; % of TOTAL EXPORT	EXPORT of CREATIVE GOODS; % of GDP
DK	314 888,68	171 214,36	3 506,01	2,05 %	1,11 %
EST	22 376,04	20 264,40	535,41	2,64 %	2,39 %
FI	247 388,65	100 370,86	774,80	0,77 %	0,31 %
DE	3 425 956,47	1 774 433,19	28 718,62	1,62 %	0,84 %
IS	13 578,94	8 070,30	8,27	0,10 %	0,06 %
LV	28 379,00	17 478,24	320,94	1,84 %	1,13 %
LT	42 338,92	35 539,22	1 025,61	2,89 %	2,42 %
NO	499 667,21	203 347,49	541,90	0,27 %	0,11 %
PL	489 852,48	228 692,91	5 011,38	2,19 %	1,02 %
RU	2 029 811,92	597 537,50	1 617,64	0,27 %	0,08 %
SE	523 804,38	254 229,52	4 317,19	1,70 %	0,82 %
(*) US Dollars, at current prices and current exchange rates, in millions					

311 United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en Information adopted in 13.08.2014

312 Classification: **Art Crafts**: Carpets, Celebration, Other Paperware, Wickerware, Yarn. **Audio Visuals**: Film, CD, DVD, Tapes. **Design**: Architecture, Fashion, Glassware, Interior, Jewellery, Toys. **New Media**: Recorded Media, Video Games. **Performing Arts**: Musical Instruments, Printed Music. **Publishing**: Books, Newspaper, Other Printed Matter. **Visual Arts**: Antiques, Paintings, Photography, Sculpture.

313 United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Creative economy. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en

314 United Nations Conference on Trade and Development (2014). UNCTAD Statistics. Economic trends. http://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx

Table 26: Total GDP, total import, import of creative goods

2012	GDP*	TOTAL IMPORT	IMPORT of CREATIVE GOODS	IMPORT of CREATIVE GOODS; % of TOTAL EXPORT	IMPORT of CREATIVE GOODS; % of GDP
DK	314 888,68	155 600,31	3 209,25	2,06 %	1,02 %
EST	22 376,04	20 213,40	352,99	1,75 %	1,58 %
FI	247 388,65	102 483,18	1 673,30	1,63 %	0,68 %
DE	3 425 956,47	1 571 540,61	26 460,67	1,68 %	0,77 %
IS	13 578,94	7 239,32	112,20	1,55 %	0,83 %
LV	28 379,00	18 596,90	341,04	1,83 %	1,20 %
LT	42 338,92	35 192,49	415,29	1,18 %	0,98 %
NO	499 667,21	137 307,26	3 321,34	2,42 %	0,66 %
PL	489 852,48	227 218,65	3 342,29	1,47 %	0,68 %
RU	2 029 811,92	449 422,34	8 468,60	1,88 %	0,42 %
SE	523 804,38	223 816,30	3 828,79	1,71 %	0,73 %
(*) US Dollars, at current prices and current exchange rates, in millions					

APPENDIX 2: Definitions of CCIs

Table 27: Definitions of the creative and / or cultural industries

DENMARK	ESTONIA	FINLAND	GERMANY	ICELAND*
- Advertising - Architecture - Arts & Crafts - Books & Press - Content Production & Computers - Design - Fashion & Clothing - Film & Video - Furniture & Interior Design - Music - Radio & TV (KREATIVE ERHVERV)	- Advertising - Architecture - Arts - Audiovisual field - Cultural heritage - Design - Information Technology - Music - Performing arts - Publishing (LOOMEMAJANDUS)	- Advertising and marketing communications - Animation production - Architecture services - Art and antique sales - Communications - Dance and theatre - Design services - Film and TV production - Game industry - Handicraft - Music and entertainment services - Radio and sound production - Sports and adventure services - Visual arts and art galleries (LUOVAT ALAT)	- Advertising Market - Architectural Market - Art Market - Book Market - Broadcasting Industry - Design Industry - Film Industry - Games / Software Industry - Music Industry - Performing Art market - Press Market (KULTUR- UND KREATIVWIRTSCHAFT)	• Cultural heritage, Museums and Archaeological places • Performing Arts • Music • Visual Arts • Design and Architecture • Film and TV • literature (SKAPANDI GREINAR) (*Based on the UNESCO definition. No national CCI definition available.)
LATVIA	**LITHUANIA**	**NORWAY**	**POLAND**	**RUSSIA**
- Advertising - Architecture - Cinematography - Computer games and interactive software - Cultural education - Cultural heritage - Design - Music - Performing arts - Publishing - Recreation, entertainment, other cultural activities - Television, radio and interactive media - Visual arts (KULTŪRAS UN RADOŠĀS INDUSTRIJAS)	- Advertising - Architecture - Crafts - Design - Film and video production - Music - Publishing - Radio and TV programs and broadcasting - Performing arts - Software and computer services - Visual and applied art (KŪRYBOS IR KULTŪROS PRAMONĖS)	- Advertising - Architecture - Arts - Cultural heritage - Design - Film - Games - Marketing - Media - Music - Photo - Radio - TV (KULTURNÆRINGEN)	- Advertising - Antiques market - Architecture - Cultural heritage - Design - Fashion - Film and photography - Handicrafts - Libraries - Mobile phones and new technologies - Music - Performing arts - Publishing market - Software and computer games - TV and radio - Visual arts (BRANŻA KULTURY I BRANŻA TWÓRCZA)	- Advertising - Architecture - Art and antiques market - Crafts - Design - Designer fashion - Film - Interactive leisure software (video games) - Music - Performing arts - Publishing - Software - Television & radio (ТВОРЧЕСКИЕ ИНДУСТРИИ)
SWEDEN	**DCMS 13**	**EUROPEAN COMMISSION**		
- Architecture - Arts - Computer and TV games - Cuisine - Design - Experience based learning - Fashion - Film - Literature - Market communication - Media - Music - Photography - Scenic arts - Tourism (Not a national definition) (KREATIVA NÄRINGAR)	- Advertising - Architecture - Art and antiques - Computer games - Crafts - Design - Designer fashion - Film and video - Music - Performing arts - Publishing - Software - TV and radio (CREATIVE INDUSTRIES)	- Advertising - Architecture - Broadcast media - Design (Fashion, graphic, interior, product) - Film - Finer arts (literary, visual and performance arts) - Gaming software, new media - Libraries, museums, heritage - Music - Object d‟art (glass, ceramics, cutlery, crafts, jewelry) - Photography - Print media (CREATIVE AND CULTURAL INDUSTRIES)	UNCTAD: The cultural industries generate creative content in a local context through literary, visual and performing arts. The creative industries derive value from copyrighting and distributing creative content.	NOTE: Other terms may also be in use in the countries referred

Definitions of CCIs based on the following sources:

Council of Europe / ERICarts (2012). Country profile. Lithuania. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

Kauppa- ja Teollisuusministeriö (2007). Luovien alojen yrittäjyyden kehittämisstrategia 2015. https://www.tem.fi/files/22570/Luovat_alat.pdf

Council of Europe / ERICarts (2012). Country profile. Sweden. Compendium of Cultural Policies and Trends in Europe. http://www.culturalpolicies.net/web/countries-profiles-download.php

Federal Ministry of Economics and Technology (2011). Monitoring of Selected Economic Key Data on Culture and Creative Industries 2011. http://www.kulturwirtschaft.de/wp-content/uploads/2013/06/DE-CCI2011-shortversion.pdf

The Danish Government (2013). Denmark at Work. Plan for Growth in the Creative Industries – Design. SUMMARY.

The Voila Project (2013). Creative industries in Poland. http://voilaproject.eu/wp-content/uploads/2013/05/CREATIVE-INDUSTRIES-IN-POLAND.pdf

Interview, NO2.

Elena Zelentsova and Nickolay Gladkeeh (2009). Creative Industries: In Theory and in Practice. Creative industries agency. http://creativeindustries.ru/eng/analytics_russian/creative_industries_book

Benjamin Reid, Alexandra Albert and Laurence Hopkins (2010). A Creative Block? The Future of the UK Creative Industries. A Knowledge Economy & Creative Industries report. The Work Foundation.

Ministry of Culture (2014). Creative industry areas in Estonia. http://www.kul.ee/en/activities/creative-industries

Ministry of Culture Republic of Latvia (2014). Cultural and Creative Industries. http://www.km.gov.lv/en/cross_sector/creative.html

Mennta- og menningarmálaráðuneytið (2012).Skapandi greinar – sýn til framtíðar. Úttekt á stöðu og tillögur um bætt starfsumhverfi. Starfshópur um skapandi greinar.

European Commission (2010). Priority Sector Report: Creative and Cultural Industries. March 2010 – deliverable D9-1.

APPENDIX 3: List of interviews

Table 28: Interviews

Country	Type of organization
DE1: Germany	Association, cultural support/interest organization
DE2: Germany	Public sector agency, support/interest organization
DK1: Denmark	Ministry
DK2: Denmark	Independent institution, support/interest organization
DK3: Denmark	Public initiative
EST1: Estonia	Public promotion agency
EST2: Estonia	Private company, expert organization
FI1: Finland	Ministry
FI2: Finland	Public educational organization
FI3: Finland	Ministry
IS1: Iceland	Private promotional organization
IS2: Iceland	Public agency, promotional organization
LT1: Lithuania	Ministry
LV1: Latvia	Ministry
PL1: Poland	Public educational institution
NO1: Norway	Ministry
NO2: Norway	Public development agency
RU1: Russia	Public agency, support organization
RU2: Russia	Public agency, cultural and educational organization
RU3: Russia	Development organization
SE1: Sweden	Public development agency

APPENDIX 4: Creative Cases Map