

Creative economies in Romania – spatial projections and trends

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Abstract. Creative economies are at the heart of the knowledge-based economy. The main objectives of the study are to present the spatial design of the regional systems of creativity in Romania and to identify the evolutionary trends, by creating spatial models for key economic indicators, specific to such economic activities. This paper focuses on how creative economies are concentrated in the national network of settlements and how they differentiate in terms of regional profile. Consequently, a yearly nationwide database was created for 2000–2012, which includes four-digit creative economic activities, according to the Classification of National Economy Activities, for each administrative unit in Romania. The analyses, conducted for the same period, show a concentration of creative economies as a national polycentric network which includes the capital city and cities with over 300,000 inhabitants, as well as their structured territorial systems emerging around them, representing the local and regional polycentric networks. The analysis of the economic profiles highlights the growing share of creative economies in the national economy that tends to contribute more and more to the increase of the operational complexity of the local and regional economies.

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1. Introduction

In recent decades, Eastern Europe has experienced major transformations of national economies, which recorded spectacular increase and deep structural changes. Recent researches begin to offer important results to the spatial changes with a specific terminology (Hall, 2000; Glaeser, 2005; Markusen et al., 2008; Pratt, 2008; Thorsby, 2008; Scott, 2011; Zang et al., 2012; Hong et al., 2014; Stoian et al., 2014).

The characteristics of creative economies represent a major concern for policy-makers who are considering the objectives set at European level to develop a knowledge-based economy. In this respect, it is important to address the creative components of the economic system embedded in other components of the territorial system for identifying functional interdependencies.

As one of the most rapidly growing economic sectors at the global level and a driver of economic growth, creative economies today are an indicator of economic performance (European Commission, 2010; UNDP, 2013). This, therefore, requires an orientation towards the distribution of creative industries in the national network of towns as well as the way in which such distribution is determined by other characteristics of territorial systems. Another important aspect is the development of methodologies for analysing the creative economy to quantify the importance of this economic sector in the development of local and regional economies by generating multiple effects in territorial systems (Florida, 2002; Landry, 2003; Środa-Murawska, Szymańska, 2013). The analysis of creative economies constitutes an interesting topic for the scientific world, concerned with nanostructure analyses of local

economies to detect mechanisms triggering higher adaptive capacity to structural crises (Carrillo, Flores, 2012).

Many authors consider creative economies as generating functional complexity and – implicitly - growth of local economies (Drake, 2003; Florida, 2005; Burcea et al., 2014; Pintilii et al., 2014 a, b; Stoian et al., 2014; Drăghici et al., 2015). The link between sustainable economic development and creative economies is highlighted by some authors who consider this part of regional economy as essential for developing long-term development strategies (Deheinzelin, 2011; Harvey et al., 2012; Méndez et al, 2012; Abankina, 2013; Shuaib et al., 2013) as creative economies, although they do not have a high share in the local economy, generate multiplication effects in other parts of a local economic system (O'Connor, 2000).

Over the last two decades, numerous studies have explained and developed the concepts of “creative industry” and “creative economy” from different perspectives (Howkins, 2001; Cunningham, 2002; Roodhouse, 2006; Hesmondhalgh, 2008). The first line of research focuses on the hypothesis of the importance of the creative and cultural activities in the local, regional or national economy, but also on the creation and maintenance of a significant number of jobs (EC, COM-2010-183). The creative industry becomes a key concept in the economy of knowledge contributing to the increase of territorial competitiveness by implementing coherent policies, development strategies and inter-institutional cooperation for the development of creative activities (Banks, Hesmondhalgh, 2009; Comunian et al., 2010).

The design of the national network of the creative poles has an important role in understanding how creative economies can be supported to at-

tract other economic activities, an aspect identified in numerous surveys conducted on urban systems in Romania (Peptenatu et al., 2012a; Dobrea et al., 2016). Also, the detailed analysis of entrepreneurial profiles in complex territorial systems plays an important role in decision making aimed at sustainable development (Ianoş et al. 2012; Peptenatu et al., 2012b). The objectives are to present the spatial design of the regional systems of creativity in Romania and to identify the evolutionary trends, by creating spatial models for key economic indicators, specific to such economic activities.

2. Research materials and methods

The study of specialized literature on “creative industries” and “cultural industries” shows numerous

inconsistencies and incompatibilities between different conceptual approaches. Thus, in this study we considered the concept of creative economy as the most comprehensive one for the achievement of relevant spatial design in the perspective of projecting the relationship between regional development and creative economies.

The quantification of the role of creative economies in the economic profile was achieved by creating a database that includes the number of companies and the number of employees for creative economic activities per the Classification of National Economy Activities, on four-digit level (Table 1). Despite some differences, the Romanian system of classification is like other systems such as the American or the British system (The Work Foundation, 2007; Department for Culture, Media, Sport, 2013; Harris et al., 2013). The database was made within the project developed, mentioned in Acknowledgement.

Table 1. NACE Codes, belonging to creative economies

Nace Code	Economic activity
1811	Printing of newspapers
1812	Other printing activities
1813	Prepress services
1814	Binding and related services
5811	Book publishing activities
5812	Guidebooks, compendiums, mailing lists and similar activities
5813	Newspapers publishing activities
5814	Journals and periodicals publishing activities
5819	Other publishing activities
5821	Computer games publishing activities
5829	Other software publishing activities
5911	Motion pictures, video and television program activities
5912	Post-production, Motion picture, video and television program activities
5920	Sound developing, recording and music publishing activities
6010	Radio broadcasting activities
6020	Television broadcasting activities
6110	Telecommunications activities through cable networks
6120	Telecommunications activities Wireless network (excluding satellite)
6130	Satellite telecommunications activities
6190	Other telecommunications activities
6201	Custom software development activities (software-oriented client)
6202	Information technology consultancy activities
6203	Management activities (management and operation) of computing
6209	Other information technology and computer service activities
6311	Data processing, hosting and related activities

6312	Web portals activities
6391	News agency activities
6399	Other information service activities
7111	Architectural activities
7112	Engineering activities and related technical consultancy
7120	Technical testing and analysis activities
7311	Activities of advertising agencies
7312	Media representation
7320	Activities market research and public opinion polling
7410	Specialized design activities
7420	Photographic activities
7430	Activities of oral and written translation (interpreting)
7490	Other professional, scientific and technical activities
9001	Artistic interpretation activities (performances)
9002	Support activities for artistic interpretation
9003	Activities of artistic creation
9101	Libraries and archives activities
9311	Operation of sports
9312	Activities of sports clubs
9313	Activities of fitness centres
9319	Other sport activities

Source: National Institute of Statistics (Romania)

Cartographic models (ArcGIS) emphasized the beginning of the analysis period (2000), the peak year of economic development in Romania (2008) and the end of the period (2012). Special attention was paid to the 2008–2012 period when Romania felt the effects of the economic crisis. To identify the structural dynamics of creative economies, rank dynamics was performed for the 2000–2012 period in relation to the number of companies and the number of employees.

3. Research results

3.1. Developments of creative industries

Detailed analyses performed on the administrative unit show a permanent increase of creative economies, with significant differences at the national level. In 2000, the highest number of companies in creative economies were concentrated in Bucharest, with over 2,800 companies (42% of the total), followed by Cluj-Napoca, Braşov, Craiova, Constanta, Iaşi, Timişoara, Ploieşti, Sibiu and Oradea, which

together account for only 27.3% of the total number of companies in this economic sector (Fig. 1). The year 2008 witnessed a significant increase of the number of companies in this economic sector. Although the share of Bucharest slightly decreased (40.8%), the number of companies in the capital city reached 13,494. Also, the main cities of Romania and several county residences (Galaţi, Tulcea, Alba Iulia, Arad) recorded spectacular increases.

During the economic crisis, there was a decrease of the number of companies, statistically recorded in 2010 (Fig. 2), followed by a rebound in 2011 and 2012 because of investments in development and activity restructuring. In 2012, the number of companies in the creative sector increased in the peri-urban areas where the operating costs were much lower. In 2000, Timişoara had the highest number of employees in creative economies (48.6% of the total), followed by Bucharest (22.9%) (Fig. 3). This hierarchy changed in 2008, when the capital city attained the highest number of employees in creative economies (34.5%), followed by the main economic centres of Romania. The number of the employees for 2012 showed a major impact of the

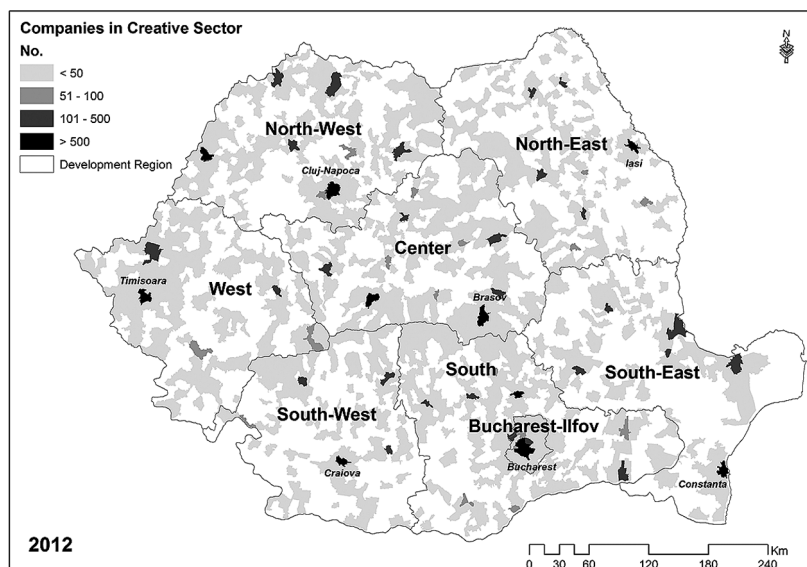
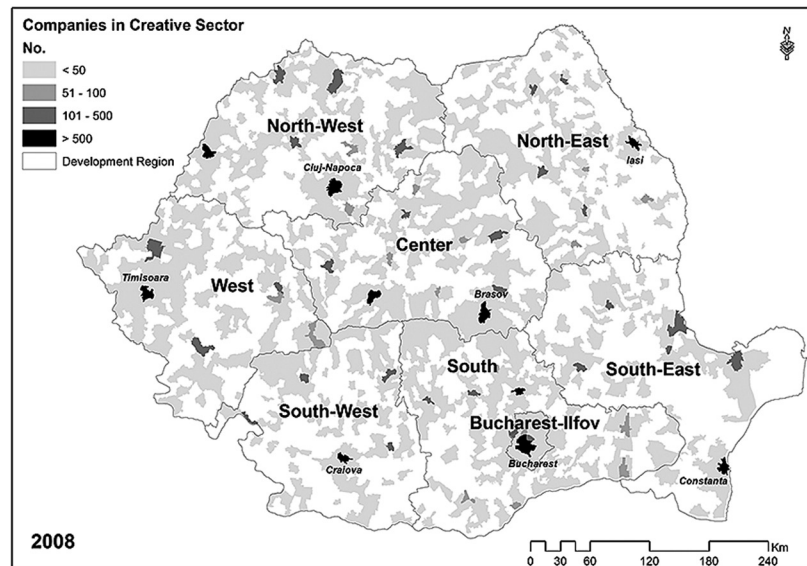
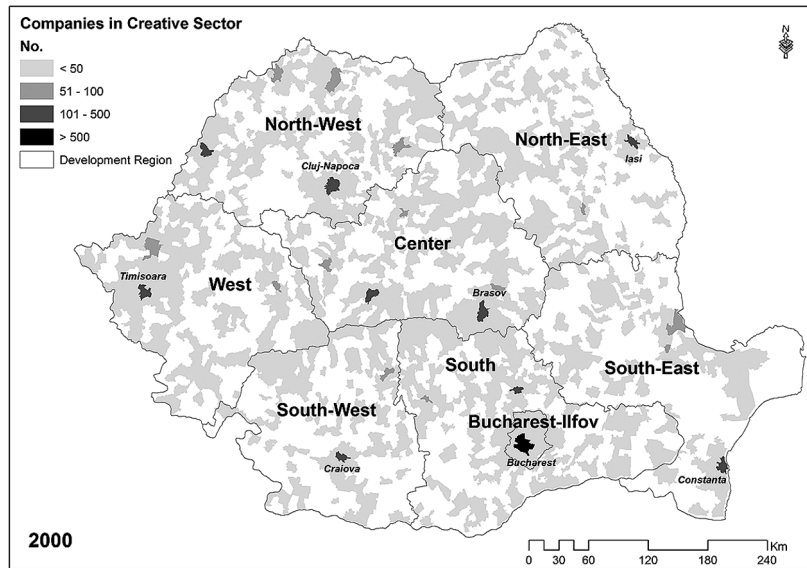


Fig. 1. Distribution of companies in the Creative Sector (2000, 2008, 2010)

Data source: Project UB1365

economic crisis on this economic sector. The highest values, for the employees, were recorded in Bucharest (49% of the total), followed by Cluj-Napoca, Timișoara, Brașov, Iași and Ploiești.

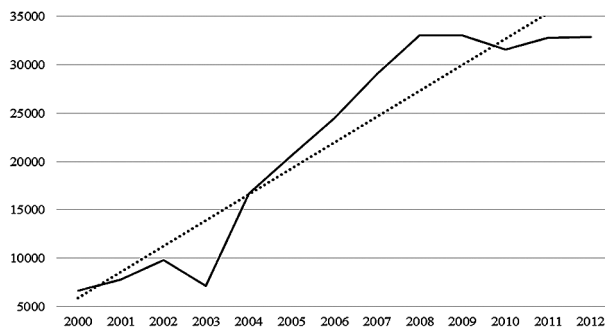


Fig. 2. Companies in the creative sector in Romania

Data source: Project UB1365

The evolution of the number of employees during the 2000–2012 period was strongly influenced by the economic environment in Romania. The spectacular dynamics after 2003 coincided with supported reforms of certain creative economic activities. In 2008, after the beginning of the economic crisis, massive reductions in the number of employees occurred (Fig. 4), and some companies interrupted their work. After 2010, there was a slight increase in the number of employees due to the growth of the entire regional economy. The analysis of ranks held by each creative economic activity highlights the dominance of advertising agencies (7311), which occupied the first position in the analysed period over the last nine years (Table 2). Software development (6201) holds the second place recording a slight upward trend in the hierarchy. Architecture activities (7111) ranked first at the beginning of the analysed period but they permanently decreased after 2004.

The distribution of ranks of the creative economic activities according to the number of companies highlights two obvious trends: the rise in the hierarchy of some creative economic activities (e.g., information technology consultancy activities – 6202, specialized design activities – 7410) and the decline of others (e.g., books publishing activities – 5811, newspapers publishing activities – 5813). The differences between these activities may be explained by the following factors: decreasing demand, higher input and operating costs (e.g., investment in equip-

ment, hardware and software), added value, market size, economic opportunity (e.g., architecture offices without much demand, the construction field being in decline). The decline of some economic activities, such as editing and publishing books and newspapers, was caused by high costs of business incorporation and operation, low added value, relocation difficulty, market shrinkage.

Table 2. Evolution ranks according to the number of companies in the creative sector

CAEN	2000	2002	2004	2006	2008	2010	2012
7311	2	2	1	1	1	1	1
6201	3	3	3	3	3	3	2
7111	1	1	2	2	2	2	3
6202	7	6	4	4	4	4	4
1812	4	4	5	5	5	5	5
5911	9	9	8	7	6	6	6
5829	8	8	7	6	7	7	7
7420	6	7	9	9	8	8	8
7410	11	10	10	10	10	9	9
5811	5	5	6	8	9	10	10
9001	19	16	15	12	11	11	11
9003	15	14	11	11	12	12	12
5814	12	12	12	13	13	13	13
9002	22	20	20	19	16	15	14
5813	10	11	13	14	14	14	15
6020	14	13	14	15	15	16	16
5920	18	18	18	16	17	17	17
5819	13	15	16	18	19	19	18
1813	17	17	17	17	18	18	19
6010	16	19	19	20	20	20	20
1820	21	22	21	21	21	21	21
5912	25	25	23	23	23	22	22
1812	20	21	22	22	22	23	23
5821	24	24	24	24	24	24	24
5812	23	23	25	25	25	25	25
9004	26	26	26	26	26	26	26
2680	27	27	27	27	27	27	27

Source: Project UB1365

The analysis of ranks according to the number of employees highlights the same trends but with much higher hierarchical jumps (Table 3): the rise in the hierarchy of some creative economies (e.g. publicity agencies activities – 7311, cinema production activities – 5829) and the decline of others (e.g., newspapers publishing activities – 5813, radio

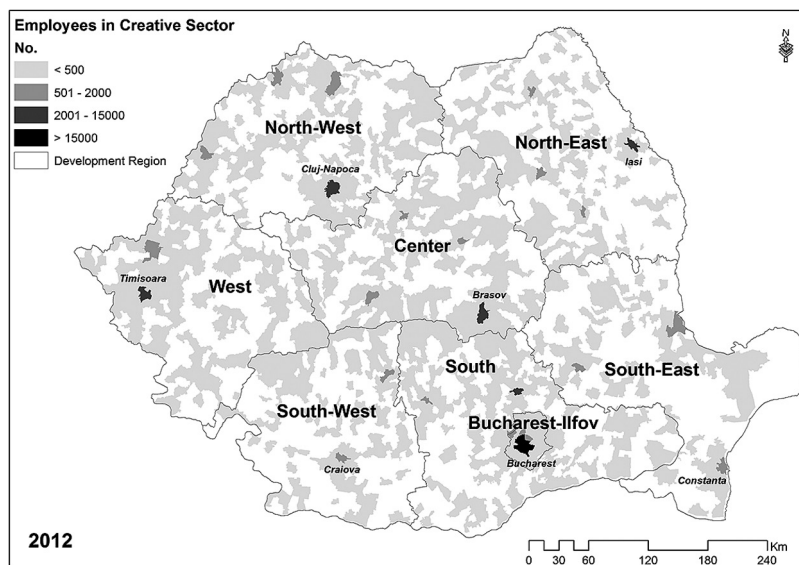
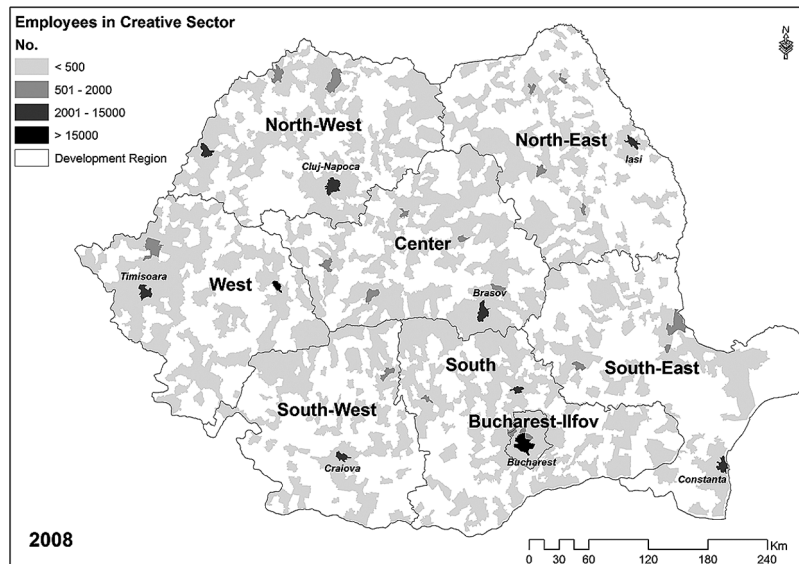
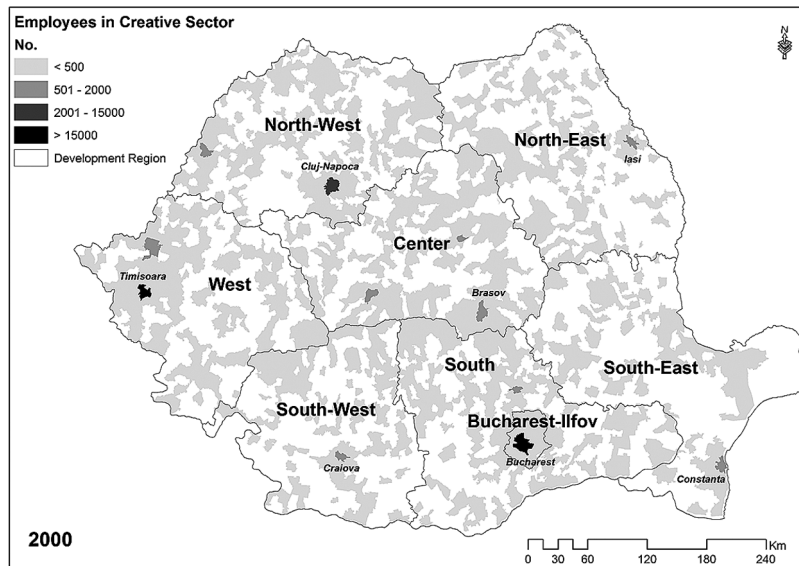


Fig. 3. Distribution of the number of employees in the Creative Sector (2000, 2008, 2012)

Data source: Project UB1365

broadcasting activities – 6010). This sector is dominated mainly by young people, aged between 24 and 49, with high and very high skills. The digital revolution of the last decade has developed and stimulated creativity and talent in an unprecedented way, with unlimited possibilities.

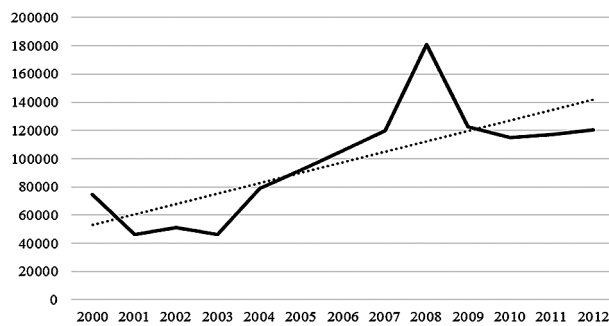


Fig. 4. Total number of employees in the creative sector

Data source: Project UB1365

The study of the dynamics of the structural profile of creative economies shows the dominance of two creative economic activities: advertising agency activities (7311) and the request for software applications development (6201). Advertising agencies along with software development companies have recorded the most spectacular increase (Fig. 5 a, b). Interesting enough is that the economic crisis has not a big influence on the creative economies. In this period, insignificant declines have been recorded, followed by increases. Turnover and profit in these two activities followed the same path except that advertising agencies recorded larger decreases after 2008 due to lower advertising budgets (Fig. 5 c, d, e, f) whereas software production increased more after 2009 due to significant foreign investments. The evolution of the number of employees in the two creative economic activities recorded different trajectories after 2008. With software development activities, the number of employees increased (Fig. 5 g, h) while the number of employees in advertising agencies fluctuated.

Software “factories” grew continuously and almost linearly, under an increasing demand pressure. On the other hand, advertisers had the misfortune of drastic declines of the advertising budgets, once generous, of the large traditional consumers (e.g. banks, retail chains, drug manufacturers). In addition, advertisers usually address the local mar-

ket (they have low access to international markets) whose specific features – culture, mentality, preferences – they know very well. Therefore, they are virtually dependent on the state of the economy, even if the demographic recruitment potential is favourable.

Table 3. The evolution of ranks according to the number of employees in the creative sector

CAEN	2000	2002	2004	2006	2008	2010	2012
7311	5	2	3	2	1	1	1
6201	4	3	2	1	2	2	2
7111	3	4	4	4	4	4	3
6202	1	7	6	5	5	5	4
1812	2	1	1	3	3	3	5
5911	10	9	9	10	9	9	6
5829	12	11	10	7	7	6	7
7420	9	8	11	11	12	12	8
7410	17	16	15	14	14	14	9
5811	7	6	8	9	10	10	10
9001	22	23	19	19	18	18	11
9003	19	20	18	17	17	16	12
5814	13	12	13	12	11	11	13
9002	21	22	22	23	22	20	14
5813	6	5	5	6	6	7	15
6020	11	13	7	8	8	8	16
5920	20	19	20	20	21	21	17
5819	16	17	17	18	19	19	18
1813	15	15	16	16	16	17	19
6010	14	14	14	15	15	15	20
1820	18	18	21	22	23	23	21
5912	24	25	24	25	25	24	22
1812	8	10	12	13	13	13	23
5821	26	24	23	21	20	22	24
5812	23	21	25	24	24	25	25
9004	25	26	26	26	26	26	26
2680	27	27	27	27	27	27	27

Source: Project UB1365

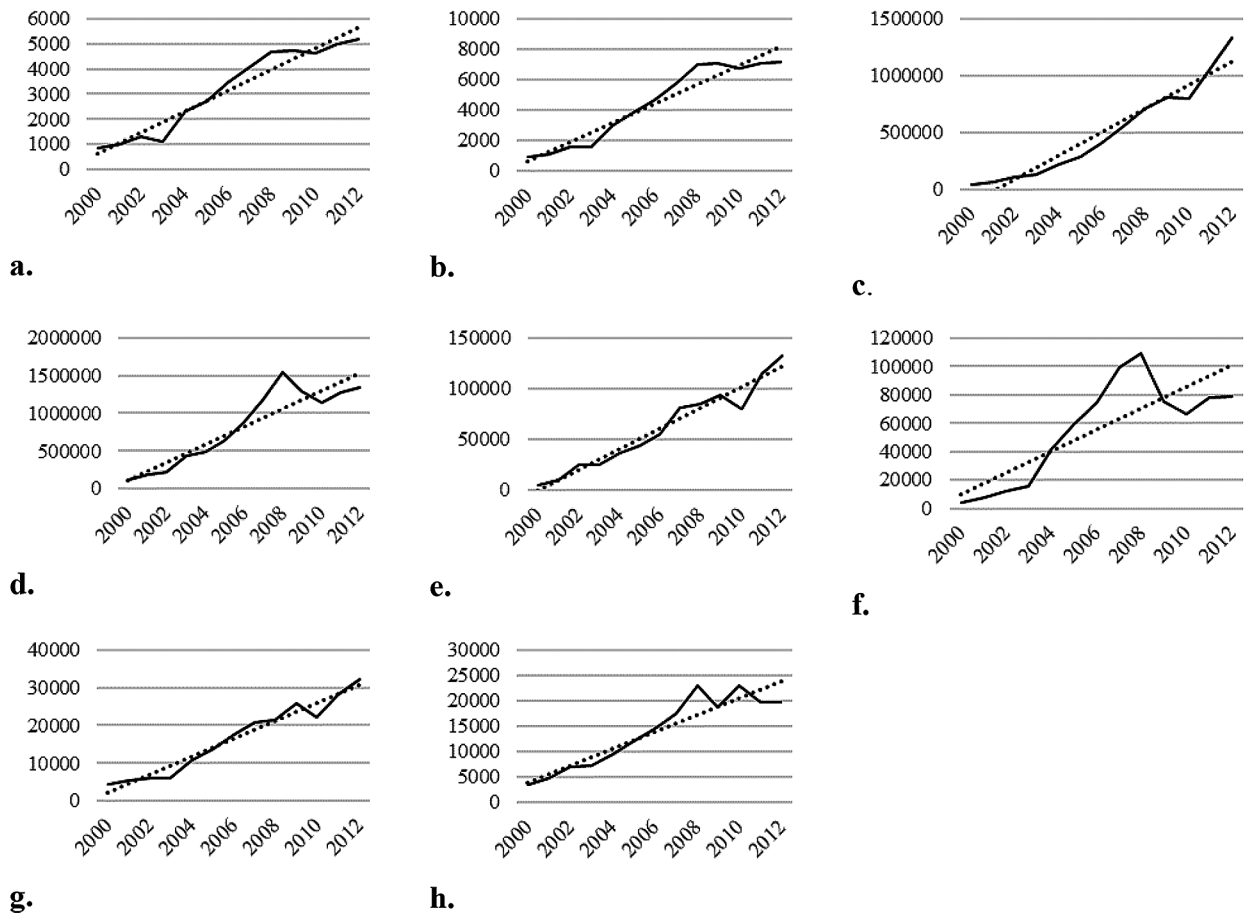


Fig. 5. Evolution of economic indicators in all major creative sectors (a. evolution of the number of companies NACE 6201, b. evolution of the number of companies NACE 7311, c. evolution of turnover (thousands E) - NACE 6201, d. evolution of turnover (thousands E) - NACE 7311, e. evolution of profit (thousands E) - NACE 6201, f. evolution of profit (thousands E) - NACE 7311, g. evolution of the number of employees NACE 6201, h. evolution of the number of employees NACE 7311)

Data source: Project UB1365

3.2. Importance of creative economies in local economies

Creative economies tend to become essential components of the economic sub-systems as their share in the national economy reached 5.7% of the total number of companies, exceeding the European average and being closer to the Scandinavian countries, known for their high values of this indicator (Fig. 6, 7). The adaptive capacity of creative economies to the economic crisis has proved to be remarkable. While other economic sectors dropped significantly after 2008, they recorded an upward trend. When analysed, the share of the number of employees from the creative economies in the whole economy shows an increasing trend over the ana-

lysed period, with a decline caused by the economic crisis that contributed to a deficit of nearly 1.5%. Romania’s position above the European average is due to a combination of economic factors: advantageous input and operating costs for entrepreneurs in the field – the companies are usually small with up to ten employees and no need for special locations.

The synthesis carried out at regional level shows the increase of the importance of creative economies in the regional economy (Tables 4, 5). The Bucharest-Ilfov region concentrates the highest rates, both in the number of companies and the number of employees, whereas the South-East Region has the lowest values for the entire period. We note the continuing growth of the share of creative economies, even during the economic crisis. The fact that the Bucharest-Ilfov region concen-

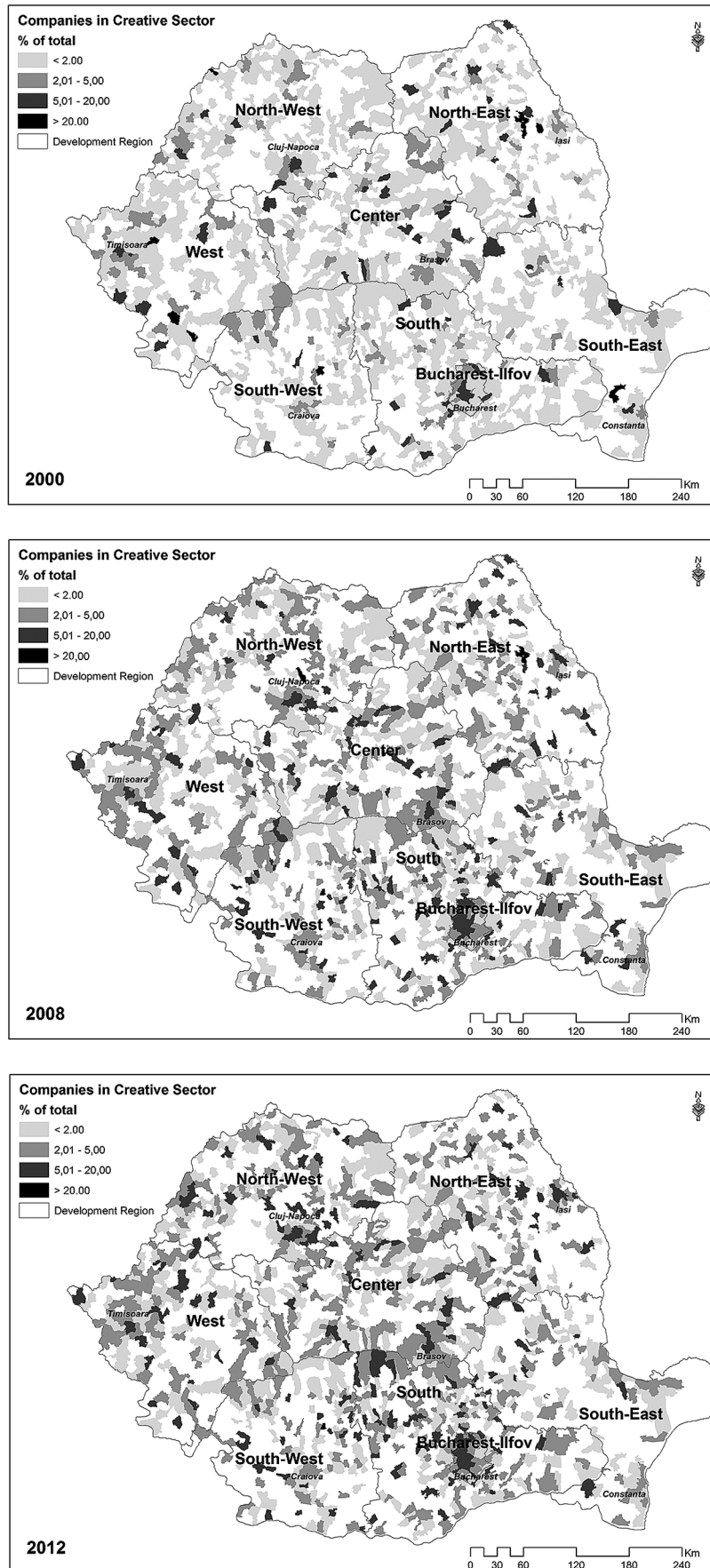


Fig. 6. Evolution of the number of companies share

Data source: Project UB1365

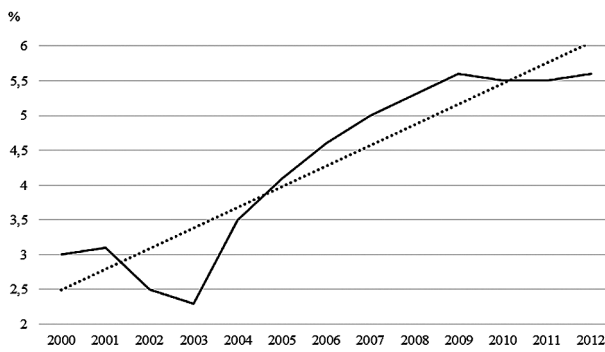


Fig. 7. Evolution of the number of companies in the creative sector in the total number of companies

Data source: Project UB1365

trates the highest rates is not surprising. According to the White Charter of Romanian SMEs (small and medium sized enterprises) of 2014, the density of SMEs in the area (number of SMEs per 1,000 inhabitants), an economic indicator considered as an entrepreneurial barometer of the population’s sense of initiative and of the attractiveness of the economic environment, was highest in Bucharest – 64.22 SMEs per 1,000 inhabitants, whereas the national average was only 26.83 per 1,000 inhabitants (Nicolescu et al., 2014). However, the near future should witness a natural dilution of the local density caused by economic, demographic, socio-cultural and political factors.

Table 4. Evolution of the share of companies from creative economies in the total number of companies

	2000	2002	2004	2006	2008	2010	2012
North-East	2.3	1.8	2.5	3.5	4.3	4.4	4.4
South-East	1.7	1.3	1.8	2.5	3.1	3.3	3.4
South	2.0	1.6	2.2	3.1	3.8	4.0	4.1
South-West	2.1	1.6	2.0	2.8	3.3	3.5	3.5
West	2.9	2.2	3.0	3.7	4.3	4.5	4.4
North-West	3.0	2.4	3.3	4.1	4.7	4.9	5.1
Center	3.1	2.6	3.3	4.1	4.7	4.9	4.9
Bucharest -Ilfov	5.2	4.7	6.7	8.2	9.1	9.3	9.4

Source: Project UB1365

The detailed analysis of the economic profiles shows an increasing share of creative economies in the Romanian national economy, contributing to sustainable growth and functional complexity

of the regional systems. This trend is emphasized by the evolution of both the number of companies and employees in creative economies. The development of creative economies, especially in regions where the level of development is low, should be encouraged by local authorities, as they could induce further development by attracting new related industries.

Table 5. Evolution of the share of employees in creative economies in the total of employees

	2000	2002	2004	2006	2008	2010	2012
North-East	0.9	0.8	1.3	1.7	2.1	2.1	2.2
South-East	0.9	0.8	1.0	1.3	1.4	1.4	1.5
South	0.7	0.7	0.9	1.3	1.6	1.6	1.7
South-West	0.8	0.8	1.1	1.4	1.5	1.6	1.7
West	1.3	1.2	1.5	1.7	3.4	2.1	2.0
North-West	1.2	1.3	2.0	2.2	2.9	3.1	3.7
Center	1.2	1.0	1.5	2.0	2.0	2.3	2.5
Bucharest -Ilfov	1.9	2.5	3.5	4.4	4.7	5.0	5.5

Source: Project UB1365

Our data support the hypothesis that the analysis on the creative economies at national level show a distribution according to the hierarchy of the Romanian cities. They could be considered engine for development, responsible for the distribution of development around, playing an important role in growing the development level of every territorial system. The present study analyses the distribution of every creative economy in territorial profile. Recent studies show that creative economies had a main role in the growth of national Economies and in the development of the local economies from the territorial systems (O’Connor, 2000; Florida, 2005). Several studies are now needed to confirm these findings and to take into account future strategic plannings of every economy branch to prevent their regress.

4. Conclusions

As expected, creative economies have thrived in Romania after the totalitarian period. Their emergence has been connected to various factors such

as a large and complex potential market, reasonable costs, high added value and high growth potential. The birth of a business is related to market opportunities, but also to the entrepreneurial spirit and potential. All these clearly lead to the hegemony of the capital city in this field. Since the beginning of market economy in Romania, Bucharest (and later the peri-urban area) provided optimal economic, demographic and social conditions for the development of the creative economy: space, infrastructure, market and workforce.

Thus, the behaviour of creative economies during the economic crisis raises new hypotheses regarding the management of the territorial systems. One of the hypotheses to be emphasized is that creative economies determine a superior adaptive capacity. The validation of this hypothesis requires that regional development strategies pay special attention to these economic activities to prevent or mitigate shocks from the territorial systems situated in the upper side of the urban hierarchy. The spatial modelling of creative economies clearly shows an increasing trend of their delocalization towards major cities' outskirts where they can increase their competitive advantage. This process is obvious in the case of Bucharest where creative economies tend to grow in the emerging territorial system structured around it. A feature of these economic activities is the fact that they are located close to Bucharest's main ways of access in the areas of the emergent system benefiting from a good "reputation". The paper entails a future direction of study that overlaps the polarizing ability of the territorial systems over the poles of creativity. Such research could highlight the importance of creative economies in developing the capacity to convert information into development.

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