



THE CREATIVE INDUSTRY AS A FACTOR IN THE DEVELOPMENT OF THE ECONOMY: DISSEMINATION OF EUROPEAN EXPERIENCE IN THE COUNTRIES WITH ECONOMIES IN TRANSITION

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Abstract. The purpose of this article is to determine the possibility of using the experience of European countries in the development of the creative industry as a driving force for economic growth for the economies in transition. The authors studied the concept of the creative industry, existing models of classification of sub-sectors of the creative economy. The article analyses data on the world trends in the development of the creative industry and features of these processes in the economies in transition. Based on the results obtained, the key triggers that should be influenced by government regulation in economies in transition are: ensuring access to finance, ensuring an effective system of education at all levels to ensure the availability of skilled labour and literacy consumers of creative products, availability of high-quality infrastructure and regulatory system. Proceeding from this, recommendations for the development of creative industry in the economies in transition structured in terms of the key stakeholders: government, local government (regions and cities), higher educational institutions, creative industry, and other business representatives.

Keywords: classification of creative industries, creative economy, creative industries, economies in transition.

Introduction

In recent years, the need for thinking, adapting, and exploring the opportunities and prospects for creative industries (CIs) in countries with transitional economies (CTEs) has increased significantly. It is primarily related to the presence of significant shortcomings in the

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economic models (EMs) of a number of CTEs, particularly post-Soviet, causing insufficient rates of their economic development and gap behind both the indicators of developed countries (DCs) of the world and a number of CTEs. The deadline for the transition to a market economy most transition countries at the moment is uncertain.

One of the key reasons for this is the lack of effectiveness of structural economic reforms, which in the era of scientific and technological transformations, mass digitization and increasing the role of intellectual property, should ensure the formation of an innovative EM (Balcerzak & Pietrzak, 2017; Madrak-Grochowska, 2015; Wierzbicka, 2018; Nwaiwu, 2018). This model should be based on the development of the quaternary sector of the economy, involving the generation and dissemination of knowledge and information, including through the development of CIs (Spitsin, Mikhalchuk, Chistyakova, Spitsyna, & Pavlova, 2018). As productive sectors of the creative economy (CE), CIs produce goods and services using creativity and intellectual capital as “primary inputs” and therefore proposes clean, green and sustainable economic models (García Lorente, 2016).

Creating new areas of economic activity, the CIs create the conditions for economic growth and diversification, providing solutions for single-industry towns and rural settlements, expanding the inclusion of small and medium-sized businesses and become the basis for the transformation of economies of CTEs.

The CIs contributes 6,1% to the world gross domestic product (GDP), between 2% and 7% to the GDP of national economies, and 29.5 million jobs worldwide. Thus, in the global economy, a GDP of \$4.300 trillion is generated and the exportation of creative and cultural goods and services reach \$646 trillion of which 82% of countries with developed economies (CDEs) (García Lorente, 2016).

The study of the experience of CDEs in this area testifies not only to lost profits but also to the continuing huge potential of CI for the economic growth (EG) of countries with CTEs as well as individual cities and regions.

Based on this, the purpose of the article is to determine the possibility of using the experience of European countries in the development of CIs as a driver of EG and sustainable development for CTEs.

1. Previous research on the subject

To achieve the goal of the study, the authors studied the concept of the CI. We agree with the statement of Elena V. Zelentsova (2008), who determined that CIs are a synthetic phenomenon that closely linked culture, economics and social policy. These types of activity are largely contradictory: a free search for artists, focused on values such as spirituality, self-expression, beauty, *etc.*; a pragmatic business initiative, focused on the personal and corporate benefits; state and regional governance, focused on strengthening and development of the nation, country, territory (Mitkus & Maditinos, 2017).

Because of the complexity of this phenomenon, it follows that specialists in various fields explore the problems of CIs: economics, sociology, cultural studies, management and urban studies.

Since the first mention of the concept of “cultural industry (CUI)” in 1947 by Max Horkheimer and Theodor W. Adorno (2009), interest in this topic has steadily increased. These scientists have explored the concept in the context of the threats posed by the industrialization of culture. In their opinion, the CUI does not carry the values for a person, is not aimed at spiritual enrichment and enlightenment, being, in fact, an entertainment business. This is because it produces uniform, standardized innovations in the fields of art, painting, literature and cinema. At the same time, generating false needs, the CUI turns the consumer into a passive man, indifferent even to his own economic position, no matter how hard it is.

The sociologists of the French School (Morin, 1962; Miège, 1979) made a significant contribution to the development of the concept of CUIs in the second half of the 20th century.

A special place in the theoretical studies of CUIs occupies the work of Bernard Miège (1979). In particular, he was the first to classify CUIs depending on how they create exchange value. Miège (1979) also began exploring the various sectors of the CUIs in accordance with the types of materials and tools they use.

Later, as part of rethinking the future of post-industrial countries (primarily, Great Britain), the definition “CUIs” was changed to “CIs”. This contributed to the strengthening of ideas, those CIs will help to improve the economy of DCs after many industries transferred to the countries of Southeast Asia.

The subsequent works can be divided into the following main groups, corresponding to the stages of formation and transformation of the phenomenon being studied.

John Howkins (2001), Richard Florida (2005a, 2005b, 2014), Terry Flew (2005), Ann R. Markusen, Gregory H. Wassall, Douglas DeNatale and Randy Cohen (2008), Mark J. Stern and Susan C. Seifert (2008), Anna Zachorowska-Mazurkiewicz and Tomasz Sierotowicz (2017) and Beata Ślusarczyk (2018) have formed the frame of the concept of a CE, singled out the theme of creativity as a system-forming factor of social development.

The second group is research directly devoted to the history, characteristics and specifics of CIs. An important role is occupied by works Stuart Cunningham (2002), Nicholas Garnham (2005), John Hartley (2005), David Hesmondhalgh and Andy C. Pratt (2005), Susan Galloway and Stewart Dunlop (2007), Jason Potts and Cunningham (2008), Peter John Higgs, Cunningham and Hasan Bakhshi (2008), Higgs and Cunningham (2008), David Throsby (2008), Toby Miller (2009), Justin O'Connor (2009, 2010, 2011), Flew and Cunningham (2010), Flew (2005, 2012). Bruno Miguel Teixeira Bento Pires (2012), David Hesmondhalgh (2015).

The third array of publications is devoted to the role of CIs in the development of cities and regions (Landry & Bianchini, 1995; Hall, 2000; Florida, 2005a, 2014; Landry 2005, 2008, 2011; Scott, 2006; Pratt, 2008, 2010, 2011; Bontje & Musterd, 2009; Cooke & Lazzarretti, 2008; Evans, 2009; Foord, 2008; O'Connor, 2009; Comunian, Chapain, & Clifton, 2010; Krätke, 2010; Sułkowski, 2012; Anatoliivna Vasylieva & Kas'yanenko, 2013; Godlewska-Majkowska, Komor, & Typa, 2016; Štefko & Steffek, 2017; Źelazny, 2017).

The fourth group of works is devoted to the study of the development of CIs in the countries of the world with differentiation by region and level of economic development. Of particular importance are works on the development of CIs in CDEs in the context of using their experience for countries in transition (Yusuf & Nabeshima, 2005; Gibson, 2006;

Higgs, Cunningham, & Pagan, 2007, Higgs, Cunningham, & Bakhshi, 2008; O'Connor, 2009; Boix, Lazzeretti, Capone, Propriis, de, & Sánchez, 2013; Nathan, Pratt, & Rincon-Aznar, 2015; Daubaraitė & Startienė, 2015; Stasiulis, 2017; Lazzeretti, Capone, & Innocenti, 2018; Vasilyeva, Lyeonov, Adamičková, & Bagmet, 2018a; Vasilyeva, Lyeonov, Lyulyov, & Kyrychenko, 2018b; Lyeonov, Vasylieva, & Lyulyov, 2018).

A separate line of research in this group is devoted to the study of the specificity of the influence of CIs in the economic systems of CTEs.

Jaka Primorac (2014) analyzes the current state and the factors that, on the macro level, hinder the development of CIs and perspectives of CIs in Southeastern Europe (SEE). The author shows how that the situation in that region is still very diverse and that the conditions for the further enhancement of CIs are still not developed. Taking into account the heterogenic situation throughout the SEE region the author outlines the necessity for the locally-founded policies for CIs that would be created within the framework of strategies for sustainable development.

The research results of the Rahman Nurković (2015) revealed that the CIs played a significant role in the systemic transformation of the post-socialist urban settlements of Bosnia and Herzegovina (BaH). It was determined that the presence of highly qualified personnel, the presence of a local initiative for the development of culture and the promotion of the economic and social attractiveness of European cities played a positive role in these processes. At the same time, the entrepreneurial business approach to creativity in BaH is at the incubation stage and is often frozen due to complex state administration.

Christiaan De Beukelaer and Galina Koretskaya (2016) analyzes the current state, challenges, and strategies of development of CIs in Kazakhstan. The authors revealed that between 2004 and 2012 the Kazakhstan creative goods (CGs) trade deficit increased fourfold. While this shows the industries are currently not performing well internationally, it also indicates that CGs consumption within the country is significant and growing. They determined that the CIs of Kazakhstan have great potential for development, despite the weak level of state support, imperfect legislation, lack of infrastructure and human capacity.

Cristina Farinha (2018a, 2018b, 2018c, 2018d, 2018e, 2018f) analyzes the development of cultural and creative industries (CCIs) in the countries of the European Union (EU) Eastern Partnership: Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine, but most importantly, she provides a country-specific view on challenges and tailored recommendations for CCIs in them.

An analytical report "Education and Creative Industry in the Mirror of International and Domestic Practices" (Analiticheskiy tsentr pri pravitelstve Rossiyskoy federatsii, 2017) characterizes the development of the CI in Russia. The study determined that, now, the contribution of CIs to Russia's EG is insignificant. "At the moment (2017) the creative industry is estimated 0,5% of the GDP, but by 2025 its share may increase several-fold" (2017). It was concluded that the CI in Russia has a huge potential for growth, which can be realized with the development of personal potential and systemic state support.

CIs in Ukraine studied Pavlo T. Bubenko, Sergiy Luk'yanets (2014), Igor' Turs'kij (2016), Alla Kholodnitskaya (2018), Iryna V. Skavronska (2017). The works of these scientists re-

vealed that, despite Ukraine's significant potential for the development of CIs, the lack of infrastructure, the insufficiency of government support, and the lack of protection of intellectual property do not allow it to be fully realized. Despite the significant differentiation of internal conditions affecting the development of CIs in CTEs, several factors hindering their development are common to them. This is the need for improving the state support system, the regulatory framework in terms of the protection of intellectual property rights, the formation of the necessary infrastructure and system of financing.

A significant contribution to the development of the concept of CE and CIs was played by studies of the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Educational, Scientific and Cultural Organization (UNESCO).

A systematic assessment of the global turnover of cultural goods and services was first given in the UNCTAD in 2008 CE report (2008). The 2010 UNCTAD CE report determined that sector had become a important component of EG, employment, trade, and innovation in most advanced economies (2010). At the same time, most developing countries (DECs) did not use their potential for the development of CIs due to weak spots in both state politics and the business environment. The UNCTAD report, "Creative Economy Outlook and Country Profiles: Trends in International Trade in Creative Industries" (2015) describes the current state of international trade in CGs and services worldwide and in 71 countries. Statistics confirm that there are potential opportunities for CTEs and DECs to increase production and export of creative products (CPs).

UNESCO researches in the field of creative economics have a systemic nature and contain an explanation of the concepts of "creative economics", "CUIs", "CIs", "cultural creativity and innovations". UNESCO Creative economy report (2013) contains a formed classification of CCIs, systematized indicators the effectiveness and success of the CCIs. The report examines critical factors that need to be considered when making decisions and developing political strategies and programs to create new ways of developing a local CE.

That studies have formed a conceptual framework for the formation of public policy and policy recommendations in the field of cultural development, CCIs for many countries around the world.

In 2014, the auditing and consulting company *Ernst & Young* analyzed the cultural and creative markets in the EU. The study identified the main factors that will influence the global evolution of the CCIs and participants and strategies to stimulate EG, youth employment and strengthening Europe's position on a global scale (ey.com, 2014).

In 2015, *Ernst & Young* mapped the CE in the world. A rating of CIs in terms of profitability, the share of creative income in GDP and employment was established for five regions of the world: North America (NA); Europe; Asia-Pacific (A-P); Latin America (LA) and the Caribbean; Africa and the Middle East (ME) (ey.com, 2015).

From this study, we can conclude that the CIs have not yet received due recognition of their role in the development of transition economies. At the same time, the fullest use of their potential will make it possible to move from industrial and commodity economies to creative ones, which is especially important for CTEs.

2. Methodology

A three-stage approach was designed to achieve the objectives of the research. The first stage involves statistical data analysis on the world trends in the development of the CIs and features of these processes in the CTEs. The study employs time series data, specifically panel data covering the period of 2002 to 2015, in CTEs (countries of the Commonwealth of Independent States and Georgia, South-Eastern Europe), which was obtained from the UNCTAD Data centre of the creative economy (United Nations Conference on Trade and Development STAT, 2018).

Secondly, is the theoretical approach, contains the systematic, logical and comparative analysis and synthesis of scientific literature on concepts of CIs and their development with special interest to their influence on the economic and non-economic indicators of the development of countries.

At the third stage, on the basis of the obtained theoretical results and the results of statistical data analysis, the generalization and final results visualization were carried out.

3. Results of the research, and discussion with interpretation of results obtained

CIs are a dynamic sector that has been developing in recent years. In a study conducted by *Ernst & Young* analysed 11 CCIs in Europe, NA, LA, Africa, the ME and the South Pacific region (ey.com, 2015). It has combined generated \$2.250 billion (bn) in revenues (3% of world GDP). The highest earners were television (\$477 bn), newspapers and magazines (\$354 bn) and visual arts (\$391 bn). CCI generated 29.5 million jobs, which employ about 1% of the world's active population. The top three employers are visual arts (6.73 million employees), books (3.67 million) and music (3.98 million).

The economic role of CCIs in different regions is different (Table 1).

From the Table 1, it can be concluded that even though the highest rates of income from CIs and the number of people employed in the CE are in A-P countries, the highest share of creative income in GDP belongs in United States (US) and Canada.

The highest share of the creative class in Singapore is about 52%, Korea is 47%, Canada is 43%, the US is 38%, Australia is 45%, India is slightly more than 30%, Malaysia is 27%, and the Philippines is 22%. These countries occupy high positions in the ranking of countries on the Global Creativity Index (GCI).

An important economic indicator of CIs is the international trade in CGs. The global market for CGs in 2014 amounted to \$579 bn, compared with \$210 bn in 2002. The year 2015 was characterized by a fall in the volume of exports of CGs, primarily due to a decrease in this indicator in DEC countries (Figure 1a).

From 2002 to 2015, the export of CGs from DCs increased, while export revenues increased from \$122 to \$241 bn. Because the export of CGs in DEC countries in this period grew at a faster rate, the share of DCs in world exports of this category of goods decreased from 59 to 47% (Figure 1b).

Among DCs, Europe is the largest exporter of CGs, although its share has declined over the period of the study. In 2015, the five largest producers of CGs included France, Italy,

Table 1. Characteristics of the development of cultural and creatives in the regions of the world market leaders (source: created by authors (based on ey.com, 2015))

Region	Key indicators	Specifications
Asia-Pacific	\$743 billion of revenues (33% of global cultural and creative industries revenues); 3% of regional gross domestic product; 12.7 million jobs (43% of total cultural and creative industries jobs).	Nº1 in gaming: United States \$47 bn revenues (47% of global sector's revenues) focused in Japan, Korea, China; Nº1 in architecture: \$117.2 billion (53%). 4 times more architects <i>per capita</i> in Japan than in the United States; Nº1 newspapers and magazines: \$141.6 billion. 110 million copies a day sold in India. Global Creative Index 2015 leaders: Australia/1; New Zealand/3; Singapore/9. Cultural and creative industries leaders: <i>Tencent</i> (China); <i>Yomiuri Shimbun</i> (Japan).
Europe	\$709 billion of revenues (32% of the global cultural and creative industries revenues). 3% of regional gross domestic product; The sector is its third-largest employer: 7.7 million jobs (26% of total cultural and creative industries jobs).	Nº1 in advertising: \$143.7 billion revenues (50% of global sector's revenues). Nº1 in books: \$52.5 billion revenues (37%). Attracting 52% of international tourists. Seven of the 10 most visited museums in the world are European (three in Paris, two in London) and 30 of the 69 United Nations Educational, Scientific and Cultural Organization "Creative Cities" are European. Global Creative Index 2015 leaders: Finland/5; Sweden/7; Iceland/8; Netherlands/10. Cultural and creative industries leaders: <i>WPP plc</i> , <i>Publicis Groupe</i> , <i>Pearson</i> , <i>Axel Springer</i> , <i>Vivendi</i> , <i>Universal Music Group</i> , <i>Ubisoft</i> , <i>Hachette Book Group</i> .
NA	\$620 billion (28% of global cultural and creative industries revenues); 3.3% of regional gross domestic products; 4.7 million jobs (16% of total cultural and creative industries jobs).	Nº1 by sales in television: \$182 billion (38% of global television sector's revenues). The maximum consumers of digital cultural content [47% of digital distribution and revenues, ahead of Asia (25%) and Europe (24%)]. Nº1 in movies: \$28 billion (37% of global sector's revenues). Nº1 in performing arts: \$61.5 billion (49% of global sector's revenues). Nº1 in radio: \$21 billion (45% of global sector's revenues). Global Creative Index 2015 leaders: US/2; Canada/4. Cultural and creative industries leaders: <i>The Walt Disney Company</i> , <i>21st Century Fox</i> , <i>WarnerMedia</i> , <i>Gannett</i> , <i>Omnicom Group</i> , <i>Interpublic Group of Companies</i> , <i>Google</i> , <i>Apple Inc.</i> , <i>Amazon.com</i> , <i>Netflix</i> .

United Kingdom (UK), Germany, and Switzerland. The industry structure of exports of CIs from Europe is dominated by design, which includes such types of goods and services as architectural solutions, designer clothes, jewelry, home furnishings, toys.

From 2002 to 2015, exports of CGs from DECAs increased, while export revenues increased from 84 to 265 bn US dollars. In this group, China is the largest exporter of CGs. In 2015, the top five exporters were also Hong Kong, China, India, Turkey and South Korea. When analyzing the indicators of the development of CIs in DECAs, we consider it necessary to take into account the results of the research by Beukelaer (2014). He focused on refining

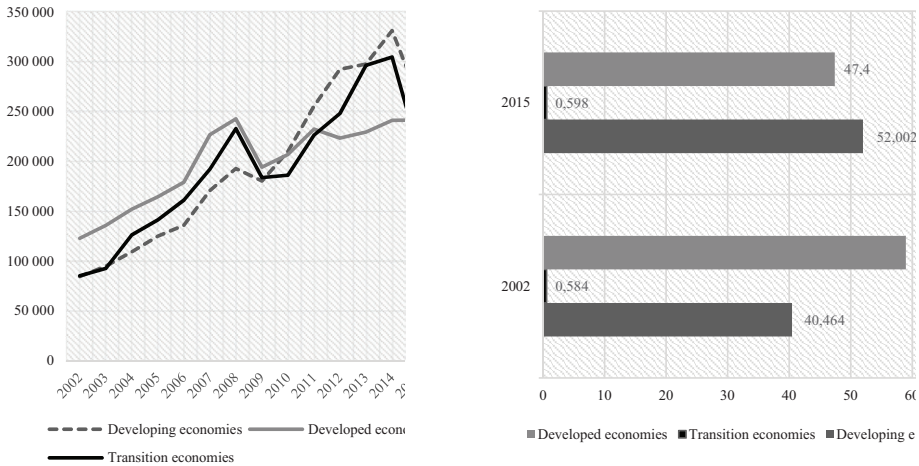


Figure 1. Export of creative goods by economic group, 2002–2015: a – values, b – shares, % (source: created by authors (based on United Nations Conference on Trade and Development STAT, 2018))

the statistical data characterizing the development of CIs in DEC. The author offers a more balanced view of the classification of countries by level of economic development in terms of in-depth disaggregation of a group of DEC for analysing CIs. The need for this is confirmed by the fact that one “DEC” (China) is the largest exporter of CGs in the world (25.51% in 2010), but 49 “least developed DCs” make up only 0.11% of the export of CGs, while they make up 880 million people (or about 12% of the world’s population).

CTEs do not play an important role in international trade in CIs. Their share in world trade in services during the period of analysis did not exceed 1%. The main contribution to the export performance of CIs in transition economies is made by countries such as Belarus, BaH, Russian Federation (RF), and Ukraine (Figure 2).

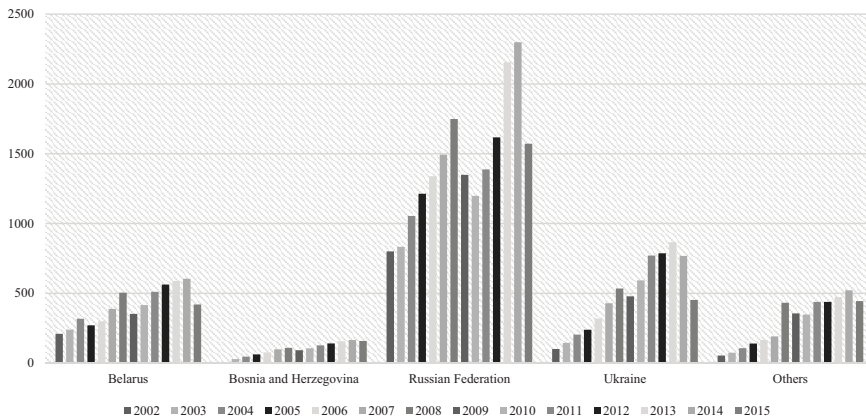


Figure 2. Values exports of creative goods in countries with transition economies, 2002–2015, \$ million (source: created by authors (based on United Nations Conference on Trade and Development STAT, 2018))

The largest share in the export of CGs from CTEs has publishing, whose share in the period of analysis fluctuated at the level of 3% of the world export of CGs.

For the development of CIs, it is important to understand the specifics of those goods that are in demand in the global market. Indicate that in all countries except the RF, the structure of the export of CGs is non-diversified with the dominance of design. The structure of the export of CGs of the RF is quite diversified, with a predominance of publishing, while over the period of the study, the importance of design and audiovisuals has significantly increased. At the same time, the results of the study indicate that a number of CTEs have sufficient internal potential for the development of CIs (Table 2).

Table 2. Dynamics of indicators reflecting the potential for the development of creative industries in economies in transition (source: created by authors (based on Florida, Mellander, & King, 2015; Dutta, Lanvin, & Wunsch-Vincent, 2018))

Country	Rank of components of Global Creativity Index 2015			Rank in Global Creativity Index 2015	Rank of Sub-Index of Global Innovation Index 2018		Rank in Global Innovation Index 2018
	Rank in technology	Rank in talent	Rank in tolerance		The Input Sub-Index	The Output Sub-Index	
Belarus	41	8	97	37	60	110	86
Russian Federation	22	15	123	38	43	56	46
Ukraine	43	24	105	45	75	35	43
Montenegro	51	34	83	46	51	55	52
Serbia	70	45	58	54	56	58	55
Georgia	35	82	78	64	53	62	59
Republic of Macedonia	76	63	70	74	71	93	84
Kazakhstan	72	54	54	84	55	91	74
Uzbekistan	74	111	64	100	n/a	n/a	n/a
Armenia	83	50	133	103	94	50	68
Moldova	85	57	128	105	79	37	48
Bosnia and Herzegovina	77	70	119	108	68	82	77
Azerbaijan	98	78	92	110	76	87	82
Kyrgyzstan	100	74	94	111	85	101	94
Tajikistan	106	90	85	114	104	88	101
Albania	83	90	118	116	69	95	83

The data indicate that a number of economies in transition (ETs) have a fairly high level of development of the CE and the formed potential for its development. For example, countries such as Belarus, RF, and Ukraine, which have the highest rates of exports of CGs in the ETs, have a rather high value of the GCI. These countries among the top 50 GCI: Belarus (37th), RF (38th), Ukraine (45th), and Montenegro (46th).

The significant potential of ETs is also confirmed by the value of the Global Innovation Index (GII). Part of them follow among the top 50 GII and have maintained relatively stable rankings since 2014: Ukraine (43rd), RF (46th), Moldova (48th). The rest of the countries, except Tajikistan, remain among the 100 GII.

Special attention should be paid to the consideration of the GII in the context of the interdependence of the Input Sub-Index as a set of resources and conditions for innovation and the Output Sub-Index as the results of the implementation of innovations. According to the data presented in the Table 2, most CTEs have significant gaps between their potential and its implementation. In our opinion, this confirms the fact that only the presence of favourable conditions will not be sufficient for the development of CIs in these countries.

We can conclude that CIs, in terms of their share in global GDP, are still in a modest position, in both advanced and DECs and CTEs. At the moment, their economic importance is not as significant as the value of the industrial and resource-saving sectors. However, on the basis of their advantages, systematized in Figure 3, their development will allow the transition from industrial and commodity economies to creative ones, which is especially important for DECs and ETs.

A research revealed that that formation of the concept of “CIs” in ETs is necessary in the context of consideration as an object of state policy and the basis for developing programs to support the development of a CE. Having a clear definition forms the systemic basis for policy development in the field of CIs, which allows the industry to thrive and promote growth, employment and development.

The results of the study revealed that the formation of the concept of “CIs” is closely related to the term “CE” used to describe economic systems, where the value is not determined by traditional resources such as land or capital but depends on originality, creativity (Howkins, 2001). UNCTAD’s concept on the Creative Economy is: “<...> the interface between creativity, culture, economics and technology in a contemporary world dominated by images, sounds, texts and symbols. At the heart of the creative economy are the creative industries” (UNCTAD, 2018).

Based on this, a holistic understanding of CIs is possible only with all aspects of the interaction of creativity, culture, economics, intellectual property and technology. At the same time, depending on the peculiarities of understanding this interaction, differences in the cultural, economic and technological development of countries, different definitions of CIs are formed both in the program documents of international organizations (UNESCO, UNCTAD) and in the program documents of countries.

When forming the national concept of CIs, it is advisable to use the accumulated international experience in this field. The most common definition of “CIs” at an international level is the definition of the Department for Digital, Culture, Media and Sport in the UK: CIs are those “which have their origin in individual creativity, skill and talent and which have a

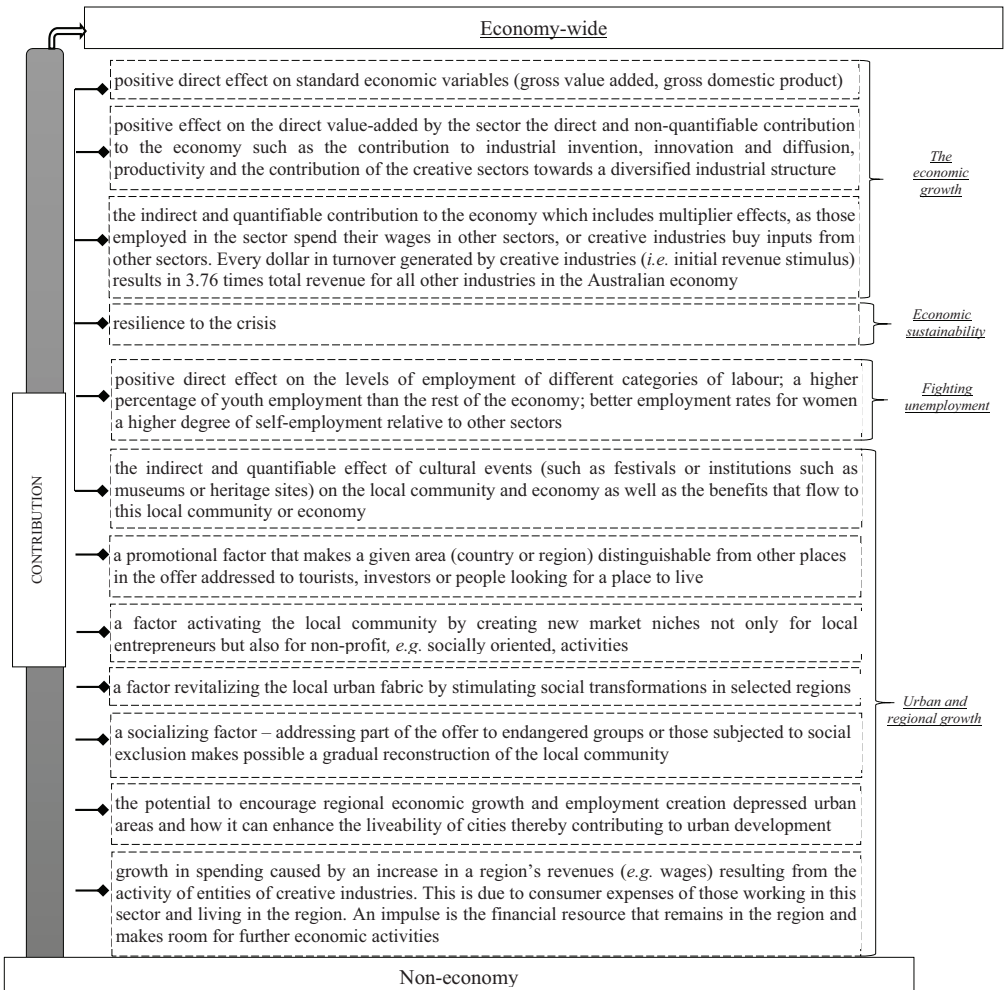


Figure 3. The benefits of creative industries (source: created by authors)

potential for wealth and job creation through the generation and exploitation of intellectual property” (2016, p. 3).

UNESCO approach defines CIs as “sectors of organised activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialisation of goods, services and activities of a cultural, artistic or heritage-related nature” (2012, 2017).

Another common term used to describe the sector is the copyright industries, which lies at the heart of the definition used by World Intellectual Property Organization. The copyright-based industries are defined as those industries in which copyright plays an identifiable role in creating tradable private economic (property) rights and income from the use of these economic rights.

The UK model was introduced in South-East Europe countries during 2005–2006 by the British Council regional project UK South East European Creative Industries Strand. This

project was dedicated to the promotion of the concept of CIs including in such countries in transition as Serbia, Montenegro, BaH. The project aimed to share the UK experience and knowledge in this field. Several mapping studies were conducted, such as the first national CIs mapping study in Serbia (2006), Albania (2007), Macedonia (2009).

There is no systematic approach to the definition of CIs in most post-Soviet countries, with the exception of Georgia. Ukraine has defined the definition of CIs, but without structuring them.

Thus for ETs, it is necessary to determine their own understanding of CIs with the following main next characteristics of should be taken into account (Țițan, Voineagu, & Todose, 2008; Butaud-Stubbs & Konstantinou, 2015):

- at the heart of the activity is the creativity and using of knowledge;
- the production of specific goods and services for local audiences and consumption associated with national cultural identity but competing with international products often protected by intellectual property (copyright and related rights), often short-lived, a high-risk level of failures and unpredictable nature of the use value of products;
- the triple nature: economic (wealth and job creation), cultural (creating values, meaning and identity) and social (creating a major and attractive communication tool);
- a sector where there is no standardised system for paying for the work performed and the prevalence of micro-enterprises, self-employed workers and self-starters;
- the market is highly volatile, depending on fashion, trends and consumption uncertainties.

A classification of CIs is based on different approaches (employment-based concept, industry-based concept), and on various existing pragmatic classifications (International Standard Industrial Classification (ISIC), Central Product Classification and International Standard Classification of Occupations (ISCO).

For define the CIs use the method by which particular job occupations and/or job sectors were determined to be included within the broad concept of the CIs that collectively make up a “CE”. A set of five criteria are employed to ascertain that an occupation is creative: novel process, mechanization resistant, a non-repetitive or non-uniform function, a creative contribution to the value chain, and involves interpretation not merely a transformation in the service or artifact (Bakhshi, Freeman, & Higgs, 2013).

If the profession meets four criteria, then it can be attributed to the group of creative (value 1 assigned where the occupation complies with the criterion and 0 where it does not). Creative intensity calculates by using the creative occupations identified above to determine the proportion of creatively occupied jobs within each industry of employment. A threshold for CIs was determined based on the mean and standard deviation to determine which industries would be classified as creative (creative intensity of 30%).

Job occupations and/or job sectors that belong to the creative group and are most common: actors, architects, except landscape, art directors, choreographers, commercial and industrial designers, craft artists, fashion designers, fine artists, graphic designers, interior designers, landscape architects, multi-media artists and animators, music directors and composers, producers and directors, set and exhibit designers, writers and authors.

The industry-based concept it is advisable to base on the international experience of mapping CIs reflected in Figure 4.

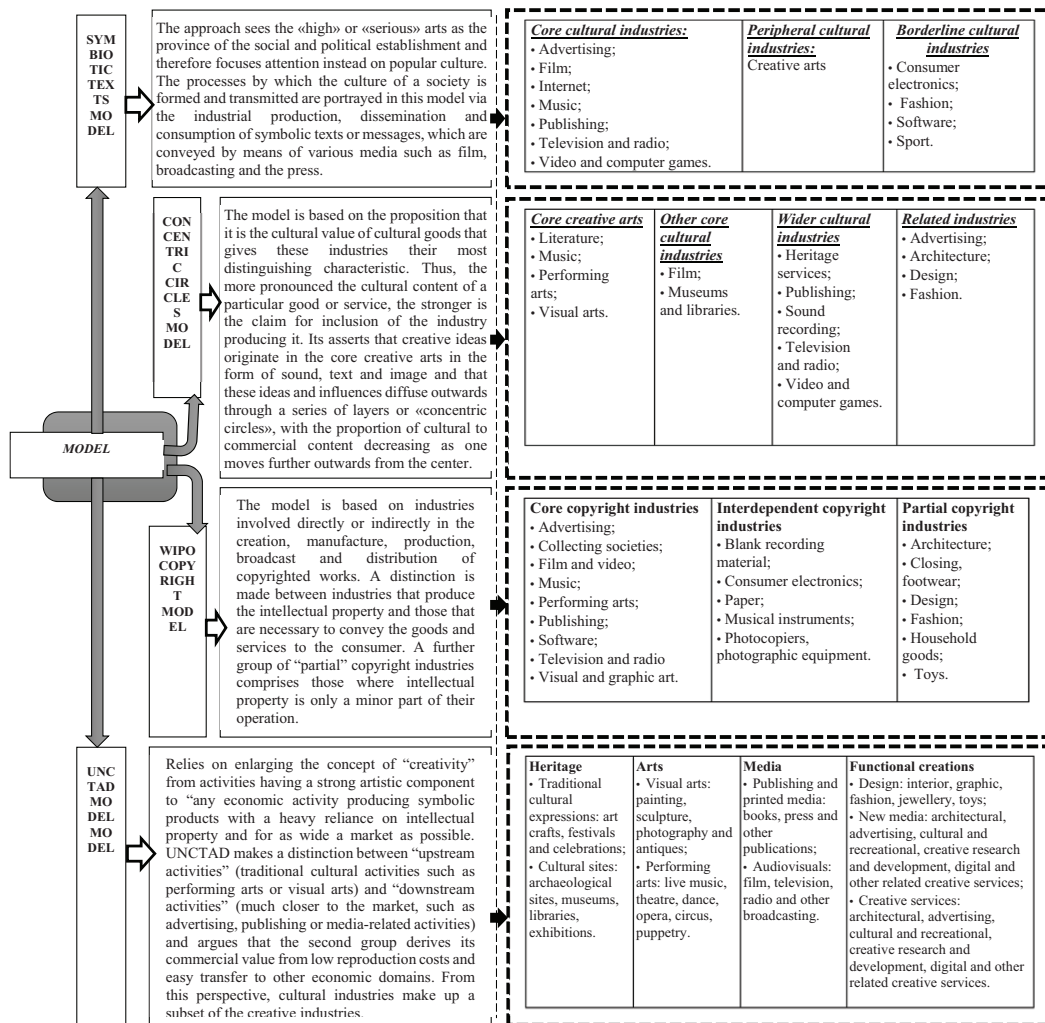


Figure 4. Classification systems for the creative industries from different models (source: created by authors)

Based on them, each country individually forms the composition of industries related to CIs (Table 3).

As we can see, industry categories that are the most common are: advertising; architecture; culture and heritage, including libraries; design; film, video and sound; publishing; music production, distribution and sales; performing arts; publishing; television and radio.

The productions chain model and the classification of CIs in the CTEs cover a small number of activities at a low level of aggregation and very often are the focus on core CUIs (e.g. publishing, film industry, music industry, radio and television).

Table 3. Comparison of countries: definitions of the creative/cultural industries (source: created by authors)

Term Used	United Kingdom	Germany	France	Poland	Macedonia	Serbia	Georgia
	Creative industries	Culture & creative industries	Cultural sector	Creative industries	Creative industries	Creative industries	Cultural and creative industries
Architecture	×	×	×	×	×	×	×
Film and video	×	×	×	×	×	×	×
Archives					×		
Advertising	×	×		×	×	×	×
Amusement services					×		
Art market/ visual arts	×	×	×	×	×		×
Audio-visual (television, radio)	×	×	×	×	×	×	×
Crafts	×				×		×
Design	×	×		×	×	×	×
Fashion	×			×	×		×
Libraries			×	×	×		
Museums			×	×	×		×
Cultural heritage					×		
Music	×	×	×	×	×	×	×
Performing arts	×	×	×	×	×	×	×
Publishing	×	×	×	×	×	×	×
Software, computer games and interactive media	×	×		×	×	×	×
Education, training, consulting					Only foreign language school		
Cultural- training activities					×		

At the same time, wanted to emphasize that the cultural and creative expression is different for each country. Based on this, it is advisable to consider alternative creative activities (CAs) in each of the CTEs if they demonstrate high potentials, *e.g.* gastronomy, winemaking, cultural tourism or crafts (BOP Consulting, 2010).

After forming a clear understanding of CIs and their structuring for the formation of a policy of their development it is necessary to conduct a comprehensive analysis. Analysis of CCI must be formed a clear understanding of the specific characteristics of the CCI in the country/region: their strengths, weaknesses, key enablers and overall development trends (Figure 5).

As the data presented in Figure 5 shows, a significant number of factors affect the development of CIs. It should be emphasized that some of them are of a general nature and form the operating environment of the activities of creative enterprises, which is almost impossible to change in the short-term time horizon. These factors, in particular, include the economic development of the country as a whole and the standard of living of the population in particular.

For the development of CIs, a middle class in the country must be sufficiently numerous to provide both a steady demand for the products of CIs and to exercise “control” over manufacturers, placing high demands on their products and contributing to the constant

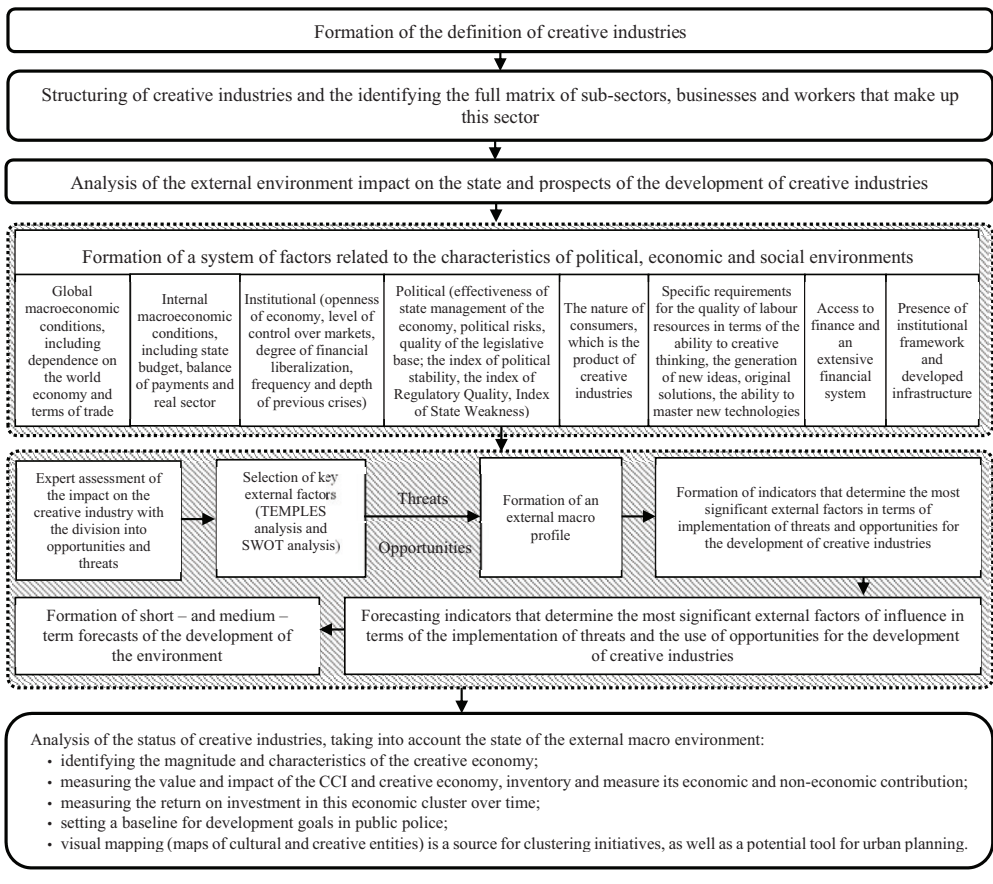


Figure 5. Directions of analysis in the context of developing a state policy for the development of creative industries (source: created by authors)

improvement of their quality and maintaining competition in the industry. At the same time, living standards and incomes in CTEs are low. Therefore, for the development of CIs, first of all, structural reforms are needed that will improve the standard of living in the country.

Based on this, we believe that the subjects of state regulation responsible for the development of public policy should choose from the entire spectrum of factors those that can be changed using the tools at their disposal with minimal expenditure of resources and time. Factors determining the consumption of cultural services (*i.e.* products of the CI) are not limited to a household's financial status, but also include level of education, the level of the cultural education of its members, their actual and expected social status, leisure resources, *etc.* In addition, those other factors make the demand for products of the creative sector (CS) highly unpredictable.

Based on the results of studying, the key factors, determining CCIs development, were structured into the following groups (Kloudova, 2010; Newbigin, 2010; Kasprzak, 2013; Liu & Chiu, 2017):

- quality of strategic political tools for the sector. On different level, these tools might take different forms, including regional strategies, local development plans and national policy papers. Overall, two main options are often used. Firstly, establishing a separate CCIs policy or strategy, and secondly, integrating CCIs into many other key policies and strategies education of members of the CS: most universities (schools) educating workers in this sector do not prepare them for economic activity, focusing on the transfer of knowledge from a specific discipline of art;
- quality of the institutional framework (Delibasic, 2016; Draskovic, Popov, & Peleckis, 2017). When shaping the institutional support for the development of CIs in ETs, it is necessary to use the European models for creating intersectoral and interdepartmental working groups at the local, regional, national and international levels. The target group for these activities is the policymakers, cultural operators, creative entrepreneurs, other industries as well as the public. As an example, Georgia initiated the establishment of the Intergovernmental Commission for Developing Creative Industries (ICDCI) in March 2016. Comprising the representatives of different state agencies, such as the Ministry of Finance of Georgia, the Ministry of Education and Science of Georgia, the Ministry of Economy and Sustainable Development of Georgia, the Ministry of Sport and Youth Affairs of Georgia, the Tbilisi City Hall and Tbilisi City Assembly, Enterprise Georgia and the Georgia's Innovation and Technology Agency, the aim of the ICDCI is to mobilise all available resources at relevant governmental agencies in order to implement (joint) projects;
- quality of staffing of the CIs (training and staff development in the system of formal and non-formal education, the presence of a model of competence and authority). A true “knowledge economy” depends on the ability of the workforce to think creatively and flexibly, not just for the CS but for the economy. Seen from this perspective, higher education institutions are no longer external to the economy, but an integral part of it. All activities should be directed to the competence of members of the CS, the formation of skills in areas necessary for economic activity, such as legal and tax issues, the ability to acquire funds (not only public), as well as the ability to plan the development of the organization;
- quality of infrastructure and communications at local, regional and national levels contribute to the emergence of creative communities. Infrastructure may be defined

as physical or virtual assets and spaces, whether full-time or part-time, single purpose or multipurpose, historic or contemporary – that support CPs and activities, and that accommodate and satisfy the requirements of activities and CIs. Communications in stimulating the development of CIs is a continuous process that is needed at both the initial stage of developing policies and strategies, and in developing partnerships in CIs and other sectors. Awareness-raising initiatives pursue different goals, including encouraging creative people (CPE) to start a business, expanding cooperation between creative entrepreneurs, training both entrepreneurs and consumers, combining creative industries with traditional industries, *etc.*;

- availability of access to permanent sources of funding (both for loans and capital) for CPE and enterprises, ensuring the creation and development of CAs, an effective system of tax incentives and taxation.

Based on the results obtained, the key triggers that should be influenced by government regulation in CTEs in the initial stages of stimulating the development of CIs, are: ensuring access to finance, ensuring an effective system of education at all levels to ensure the availability of skilled labour and literacy consumers of CPs, availability of high-quality infrastructure and regulatory system.

Proceeding from this, recommendations for the development of CI in the ETs structured in terms of the key factors and stakeholders. The main actions of state regulatory bodies are given in Table 4.

Table 4. Key actions for the development of creative industries in economies in transition (source: created by authors (based on Creative Industries Council, 2018; Working Group of EU Member States Experts (Open Method of Coordination) on Cultural and Creative Industries, 2012; Bedianashvili, 2016)

	Government	Local government	Best practices: United Kingdom
Regulatory system	1) Integration of a creative economy into the state policy and policy development for the creative industries sector. 2) Development of public policy and regulatory framework for the protection of intellectual property and competition. 3) Formation of the institutional structure responsible for the development of creative industries.	Elaborating local strategies and programs for the promotion of the development of cultural and creative industries. The documents should be integrated into regional development strategies, targeted toward regional or urban development and support their uniqueness and business development.	1) The Creative Industries Council was created, responsible for identifying obstacles to the development of creative industries and the development of measures to eliminate them. Creative Industries Council members are leading figureheads drawn from across the creative and digital industries including television, computer games, fashion, music, arts, publishing and film. 2) Development of strategies for the development of creative industries is carried out on an ongoing basis with monitoring their implementation and tracking the dynamics of achievements. In the current period, the strategy “Create Together” has been developed, to be implemented in the next five years.

Continued Table 4

	Government	Local government	Best practices: United Kingdom
Education	<p>1) Financing the training of labor resources at the expense of state institutions.</p> <p>2) Talent training financed by the government.</p> <p>3) Government scholarships for studying abroad.</p> <p>4) Providing industrial consulting, counselling and support regarding commercialization agreement on intellectual property, the corporate operation of creativity firms, and the incubation.</p>	<p>1) Financing of human resources training at the expense of local budgets.</p> <p>2) Scholarship support for talented young people.</p> <p>3) Provision of industrial consulting, consulting and support in relation to the commercial agreement on intellectual property, corporate activities of creativity and incubation firms.</p>	<p>Great attention is paid to educational programs and methodological recommendations on creating your own business, the tax system, tools for obtaining financing and much more. At the moment, Government Training Programs include: E-learning for small businesses; HM Revenue and Customs Webinars covering subjects such as business expenses, value-added tax and capital allowances.</p>
Access to finance	<p>1) Introduction of tax incentives.</p> <p>2) Participation in the co-financing of enterprises of the cultural and creative industries of national importance.</p> <p>3) Development of a mechanism for public-private partnerships to establish financing mechanisms, as well as the realization of projects.</p> <p>4) Development of preferential crediting mechanisms in conjunction with state banks.</p> <p>5) Developing financial programs for small and medium-sized enterprises.</p> <p>6) Stimulating private investment and promoting public-private partnerships for the benefit of their cultural and creative industries small and medium-sized enterprises, notably through guarantee mechanisms or venture capital funds.</p> <p>7) Support for artists and the arts, both direct (via fiscal means) and indirect (through encouragement of private sector support).</p> <p>8) Development of a mechanism for the work of incubators and accelerators.</p>	<p>1) Formation of regional budgets supporting the development of cultural and creative industries.</p> <p>2) Funding cultural events and cultural places of regional and local importance.</p> <p>3) Co-financing business incubators and accelerators.</p>	<p>Existence of an extensive financing system: the creation of agencies, the provision of premises on concessional terms, grants and affordable loans, the distribution of business angels (private investors who invest their own funds in unusual and promising projects at the stage of creating a company in exchange for a share in its capital) to the creative entrepreneurship. In 2018 the government and the creative industries sector, through the Creative Industries Council, have agreed a Sector Deal, which will invest more than £150 million across the lifecycle of creative businesses, including: places of the future – by funding leading creative clusters to compete globally; technologies and content of the future – via research into augmented reality and virtual reality; creative skills of the future – via a careers programme that will open up creative jobs to people of every background.</p>

End of Table 4

	Government	Local government	Best practices: United Kingdom
Infrastructure	1) Holding cultural activities and performances by the government. 2) Management of cultural and creative industries parks, Creative Hubs, cultural and creative industries clusters, international networks and alliances with creative hubs and entrepreneurs, cultural facilities, such as museums and galleries, as crucial brands of cultural and creative industries, and implement effective branding to promote them.	1) Elaborating local strategies and programs for the promotion of the development of cultural and creative industries integrated into regional development strategies. 2) Development of a complex of activities that stimulate clustering and network activities, that build interaction between various stakeholders.	1) The government's proposed broadband investment fund to support alternative network developers should give creative clusters a key role. This fund should be structured as a demonstrator so that all clusters can benefit from insights into how they can best support local creative businesses.

Enterprises of the creative sector to ensure their effective functioning should:

- in infrastructure – to have taken an active part in CCIs parks, creative hubs, CCIs clusters, networks and alliances; to have unite all interested parties for the development of CCIs; to have share best practices and examples of the effective implementation of creative projects; to have publication and dissemination of information on local and international trends and events in CIs; to have disseminate information on examples of successful cooperation between the business sector and cultural organizations;
- in the field of education – to have develop corporate training.

The important role in the development of CIs in the whole world is assigned to higher educational institutions. This is due to the fact that the intellectual potential of both producers and consumers CGs is of key importance in the development of the CS. Therefore, higher education institutions should be an active participant in all processes related to the development and implementation of a strategy for the development of a CE in the country, be an integral element of its infrastructure. The main activities of higher education institutions in this area are described below:

- in the field of education – to have develop of study programs, aimed at training specialists in sectors related to CIs, and professional programs for specialists in CIs; to have develop of entrepreneurship skills among the students; to have develop of targeted educational initiatives for creation of new jobs and promotion of sustainable career of students and graduates;
- in infrastructure – take an active part in the formation of the regional infrastructure of functioning of CIs and actively attract students to work in them; to participate in the creation of creative incubators and hubs and the development of new business models of these institutions;
- provide access to finance, creating and ensuring the effective use of funds for the implementation of student projects in the field of CAs.

Conclusions

The authors studied the concept of the CI in the context of international and national practice.

1. From the study, we can conclude that CIs, in terms of their share in global GDP, are still in a modest position, in both advanced and DECs and CTEs. At the moment, their economic importance is not as significant as the value of the industrial and resource-saving sectors. However, on the basis of their advantages (value-added growth, new job creation, regional development) their improvement will allow the transition from industrial and commodity economies to creative ones, which is especially important for DECs and CTEs.
2. The authors determined that for the formation of a policy of development of CCIs it is necessary to conduct a comprehensive analysis, which must be formed a classification of CIs, clear understanding of the specific characteristics of the CCIs in the country/region: their strengths, weaknesses, key enablers and overall development trends.
3. Authors determined that the classification of CIs is based on different approaches (concept based on employment, industry concept) and on various existing pragmatic classifications (ISIC, classification of main products and ISCO). At the same time, it was determined that when developing a system for structuring CIs, it is necessary to consider not only the approaches developed by international practice, but also national peculiarities.
4. The study found that the development of CIs, first of all, depends on the general business climate in the country and the standard of living of the population as the main consumer of CGs and services. This is what forms the basis for the emergence of a creative class and increased demand for the products of this sector. As Farinha (2018b) notes, as before, in most CTEs, culture is considered a luxury and is regarded as an industry with low productivity, in which resources are almost not needed. These factors, in our opinion, have a significant negative impact on the development of CIs in the countries studied.
5. The authors have determined that despite the systemic nature of the most factors affecting the development of CIs, there is a sufficiently large list of obstacles to the development of CIs, which can be eliminated even in conditions of limited resources, which, in turn, can serve as an impetus for the further development of the sector in CTEs.
6. Based on the results of studying, the key factors, stimulating CCIs development, is: quality of strategic political tools for the sector; quality of the institutional framework; quality of staffing of the CIs; quality of infrastructure and communications at local, regional and national levels; availability of access to permanent sources of funding (both for loans and capital) for CPE and enterprises, ensuring the creation and development of CAs, an effective system of tax incentives and taxation. Separating the factors that hinder the development of CIs at the moment and in the future, the subjects of state regulation will be able to form a set of measures to eliminate them, which will make the most of the economic and social potential of CA.
7. Based on this approach, the recommendations for the development of CIs in CTEs are structured in terms of key influencing factors (regulatory system, education, access to finance, infrastructure) and key stakeholders: government, local authorities (regions and cities), higher education institutions, the CI and other business representatives.

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KŪRYBINĖ INDUSTRIJA KAIP EKONOMIKOS PLĖTROS VEIKSNYS: EUROPIETIŠKOSIOS PATIRTIES SKLAIDA PEREINAMOJO LAIKOTARPIO EKONOMIKOS ŠALYSE

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Santrauka

Šio straipsnio tikslas – apibrėžti galimybę panaudoti Europos šalių patirtį plėtojant kūrybinę industriją kaip ekonomikos augimo varomąją jėgą pereinamojo laikotarpio ekonomikos šalyse. Autoriai ištyrinėjo kūrybinės industrijos koncepciją, esamus kūrybos ekonomikos subsektorių klasifikavimo modelius. Straipsnyje analizuojami kūrybos industrijos plėtros pasauliniai duomenys ir šių procesų bruožai pereinamojo laikotarpio ekonomikos sąlygomis. Remiantis gautais rezultatais, svarbiausios paskatos, kurioms įtakos turėtų vyriausybių nutarimai pereinamojo laikotarpio

ekonomikos sąlygomis, yra šios: užtikrinta prieiga prie lėšų, veiksmingos švietimo sistemos garantavimas visais lygmenimis, siekiant užtikrinti kvalifikuotos darbo jėgos pasiekiamumą bei vartotojų raštingumas kūrybos produktų atžvilgiu, aukštos kokybės infrastruktūros ir reglamentavimo sistemos prieinamumas. Nuo šio taško rekomendacijos, skirtos kūrybinės industrijos plėtrai pereinamojo laikotarpio ekonomikos sąlygomis, struktūruojamos atsižvelgiant į pagrindines suinteresuotąsias šalis: valdžią, vietos vyriausybę (regionai ir miestai), aukštojo mokslo institucijas, kūrybinę industriją ir kitus verslo atstovus.

Reikšminiai žodžiai: kūrybinių industrijų klasifikacija, kūrybos ekonomika, kūrybinės industrijos, pereinamojo laikotarpio ekonomika.