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“Measuring the Economic Contribution of the Audiovisual Industry
in the Republic of Macedonia”

COMPARATIVE ANALYSIS
of relevant case studies and successful practices of audiovisual creative industries

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The author is responsible for the choice and presentation of views contained in this... and for opinions expressed therein, which are not necessarily those of UNESCO and do not commit the Organization

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I. INTRODUCTION

1.1. The main aim and scope of the research

The main aim of this analysis is to offer a comprehensive discussion about the importance of creative industries sector for the economic development and to present a map of case studies of successful practices of development and implementation of national policies and measurements of creative industries in various European countries. A particular focus will be put on the audiovisual subsector as an important segment of cultural and creative industries with a few cases to be discussed for their significant contribution towards development of economy.

The study is based on a survey of relevant documents at EU level that extrapolate the European measurements aiming towards empowering the potential of culture resources in the local, national and regional development and on the analysis of the effects of creative industries on the general economic development. At the same time this study summarises the recommendations for improvements of the necessary links between different institutions, organisations and sectors that can be applied in the Republic of Macedonia based on the research of the successful stories and experiences in other European countries and in the region.

The interest in creative industries and in measuring the contribution of the creative industries to national economies have been developed in recent years, ever since the experts identified creativity and creative industries as a potential impetus force in the creative economy.¹ Many different theoretical studies, mappings and cross-sectorial research projects were undertaken to evaluate and compare size, performance and competitiveness of the creative industries, as well as to monitor trends and provide recommendations for policies based on quantifiable evidence. One of the first documents that tried to define the basic axioms calling for development of cultural industries (then still not distinguished from “creative industries”) was the “Essen Declaration: 10 Axioms for the Culture Industries in Europe”.² The Declaration listed ten axioms that are still relevant since most of them were objectives projected in future that have not been reached equally in all regions and sectors.³

¹ The first use of the term in similar context dates in 1997 (Australia), while the first mapping of creative industries was conducted in 1998, in UK. See: DCMS, *The Creative Industries Mapping Document 1998*, London, HMSO, 1998.

² The Essen Declaration was the outcome of the EU German Presidency Conference: "Culture Industries in Europe – A Comparison of Development Concepts" held from May 19th to 21st 1999 at the Zeche Zollverein, Essen. Last Accessed 1 August 2013, <http://www.ericarts.org/web/files/134/en/culture_industries_essen_declaration.pdf>.

³ The axioms of the Essen Declaration can be summarised as following: CULTURE INDUSTRIES represent a distinct economic sector, they are future-orientated, CI can secure and create sustainable employment at regional level, CI can help to reinforce endogenous regional potential, they deploy Europe’s historic heritage, CI need an active culture policy; CI need an active economic policy, CI require support from urban-development policy, CI require integrated urban and regional policy and a fitting context in Europe.

The studies produced later in different countries were necessarily based on mapping and comparative approaches of different sectors because of the diverse policy objectives in different contexts, either social, economic or cultural. ⁴Some difficulties emerged along the way, with regard to different cross-sectorial definitions, research methodologies and understandings of the importance of the non-economic returns of creativity, as well as the lack of transparent link to statistical reporting of national revenue and copy rights (needed to identify the overall multiple effects produced by the creative sector on society).

It was only in 2003, more than ten years after the first studies of creative industries that the *WIPO Guide on Surveying the Economic Contribution of the Copyright-Based Industries* outlined a common methodology in economic terms with particular focus put on regulation of copy-rights and its contribution to economy.⁵ From country to country the results differ widely in different creative industries depending on different cultural policies so the comparison often becomes difficult as well as drawing scientific conclusions. However regardless to the cultural and political background of the researched context some of the main reliable indicators providing solid evidence of the relevance of the creative industries have been identified as the specific contribution of the creative industries to the national economy in terms of value added, GDP and to the scope and range of employment and trade.

2.2. Definitions and clarifications of terms

Creative industries defy tight definition as they bring together a diverse collection of business disciplines that have both a cultural and economic impact on European life. Creative industries are usually defined as those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. Usually they include advertising, architecture, archives and libraries, the art and antiques market, artistic crafts, **audiovisual (such as film, radio, television, video games and multimedia)**, design, designer fashion, cultural heritage, festivals, interactive leisure software (e.g. video and computer games), music, performing arts, publishing, and visual arts.

There are still a lot of discrepancies regarding the definition of creative industries and the debate surrounding the use of the interlinked terms such as cultural industry, creative industry, cultural and creative economy, creative entrepreneurship, is still unresolved.⁶

⁴*Creative Economy Report*, United Nations, 2010, 179, http://unctad.org/en/docs/ditctab20103_en.pdf; http://www.britishcouncil.org/mapping_the_creative_industries_a_toolkit_2-2.pdf

⁵*Creative Economy Report*, 179.

The similarity of these terms and their link to culture and creativity often results in a wrongful use of some of these terms as synonyms although there are historic, theoretical and political contradictions in their background. Therefore it is important to state at the start of this discussion the fact that most of the experts agree that historically there are two major differences that makes highly problematic the interchangeable use of the terms cultural and creative industries as synonyms.

While the historic background of the term “cultural industries” lies in the core of the critical theory of the Frankfurt School, as it was conceptualised by its leading thinkers Theodor W. Adorno and Max Horkheimer, the other terms are of newer date and deal with attempts to better include creative industries in society due to the newly raised awareness of their potential for contribution to the economic development.⁷

Additionally, the concept “creative class” introduced by Richard Florida⁸, and the other related terms as “creative cities”, “creative clusters”, “experience economy” “creative commons” and “creative ecology” complicate the profound understanding of the cognitive and economic map of interlinked concepts and terms regarding creative industries.⁹

Obviously all these newly developed concepts put creative industries in a more general perspective by linking individual creative congeniality with the common societal development. However, the more recent critiques of the confusion of these terms and the political implications of the uncritical interpretation of development of creative industries focus on the context of neoliberal economic turn towards unregulated exploring the cognitive and immaterial labour. The critiques point out to the dangers and many ethical issues due to the difficulties with quantification and evaluation of individual cognitive faculties and the immaterial labour.¹⁰ The potentials for overlooking eventual hierarchisation of labour, discrimination and unregulated exploration of the creators by only a handful of powerful leading companies are only some of these critical issues.

⁶In the conclusions of the Lisbon summit, it was stressed that ‘content industries create added value by exploiting and networking European cultural diversity’.

⁷Adorno, Theodor, and Horkheimer, Max. *The Culture Industry, Enlightenment as Mass Deception, in Dialectics of Enlightenment*, English translation by John Cumming London, Verso, 1979, Translated From *Dialektik der Aufklärung: Philosophische Fragmente*. Amsterdam, Querido, 1947.

⁸ Richard Florida argues for a new “creative class” that includes nearly all knowledge workers offering professional knowledge-based services. See Richard Florida’s publications: *The Rise of the Creative Class. And How It's Transforming Work, Leisure and Everyday Life*, New York: Basic Books, 2002; *The Flight of the Creative Class. The New Global Competition for Talent*, HarperBusiness, HarperCollins, 2005; *Cities and the Creative Class*, New York: Routledge, 2005.

⁹ See: John Hartley, *Creative Industries*. Oxford, Blackwell Publishing, 2005; David Hesmondhalgh, *The Cultural Industries*, London, SAGE Publications, 2002; John Howkins, *The Creative Economy: How People Make Money From Ideas*, Penguin, 2001; Charles Landry, *The Creative City: A Toolkit for Urban Innovators*. London: Comedia/Earthscan, 2000.

¹⁰ Gerald Raunig, “Creative Industries as Mass Deception”, *EIPCP-European Institute for Progressive Cultural Policies*, 2007, Last Accessed 1 August 2013, <<http://eipcp.net/transversal/0207/raunig/en>>.

I.3. Defining different creative industries

The multidisciplinary sector of creative industries includes advertising and public relations, architecture and web and graphic design, the performing arts, publishing and software development. It also covers music, arts and antiques, crafts and fashion design, as well as film, TV and radio production. Many of these sub-sectors are predominantly commercial and profit oriented and therefore are crucial to the well-being of other areas of the EU economy. Also there is no consensus to whether tourism, cultural heritage and museums belong to creative industries because their contribution to national economy differs from country to country particularly because of different cultural policies towards these sectors that are often seen as major political tools so are partially or completely subsidised by some states.

Depending on the methodology used to define and distinguish different creative industries there are four different models, the *UK DCMS model*, *symbolic texts model*, *concentric circles model* and *WIPO copyright model*.¹¹

The first model is the oldest and dates in the late 1990s. It derives from the first attempts in the United Kingdom to reposition the British economy as an economy driven by creativity and innovation in a globally competitive world.¹² The *symbolic texts model* is typical of the approach to the cultural industries arising from the critical-cultural studies tradition as it exists in Europe and especially the United Kingdom. Instead on popular culture this approach focuses on the “high” or “serious” arts because this is seen as the province of the social and political establishment and therefore.

The *symbolic texts model* takes into account the relevance of the industrial production, dissemination and consumption of symbolic texts or messages and the various media such as film, broadcasting and the press which convey these messages and thus enable the processes by which the culture of a society is formed and transmitted.

Concentric circles model is based on the cultural value of cultural goods as the most distinguishing characteristic of creative industries. This model asserts that creative ideas originate in the core creative arts in the form of sound, text and image and that these ideas and influences diffuse outwards through a series of layers or “concentric circles”, with the proportion of cultural to commercial content decreasing as one moves further outwards from the centre.¹³

¹¹ *Creative Economy Report*, 6/35.

¹² Virtually all of the 13 industries included in the DCMS classification could be seen as “cultural” in the terms defined earlier; however, according to 2010 United Nation’s *Creative Economy Report* Government of the United Kingdom has preferred to use the term “creative” industries in order to “sidestep possible high-culture connotations of the word ‘cultural’”.

¹³ This model has been the basis for classifying the creative industries in Europe in the recent study prepared for the European Commission (KEA European Affairs, 2006). *Creative Economy Report*, 6/35.

The model titled *WIPO copyright model* is focused on intellectual property and copy rights as the embodiment of creativity. It is based on industries involved directly or indirectly in the creation, manufacture, production, broadcast and distribution of copyrighted works (World Intellectual Property Organization, 2003). In this document a distinction is made “between industries that actually produce the intellectual property and those that are necessary to convey the goods and services to the consumer”.¹⁴

None of these models is considered as better than the rest since there is no “right” or “wrong” model of the creative industries. They are simply a result of different ways of interpreting the structural characteristics of creative production and can work independently from each other or in parallel.

In addition to these four models of defining creative industries it is important to point to the fact that recently UNCTAD starting calling for making a distinction between “upstream activities” (traditional cultural activities such as performing arts or visual arts) and “downstream activities”(much closer to the market, such as advertising, publishing or media-related activities).

UNCTAD argues that the second group derives its commercial value from low reproduction costs and easy transfer to other economic domains. From this perspective, cultural industries make up a subset of the creative industries.¹⁵ Since creative industries are vast in scope, dealing with the interplay of various sectors the UNCTAD classification of creative industries divided them into four broad groups: heritage, arts, media and functional creations. These groups are in turn divided into nine subgroups. The rationale behind this classification is the fact that most countries and institutions include various industries under the heading “creative industries”, but very few try to classify these industries in domains, groups or categories.

Behind the UNCTAD classification stands the hope that such division and classification would facilitate an understanding of the cross-sectorial interactions and that this classification could also be used to provide consistency in quantitative and qualitative analysis.

¹⁴ *Creative Economy Report*, 6/35.

¹⁵ A significant shift in embracing the concept of the “creative industries” was the UNCTAD XI Ministerial Conference in 2004. At this conference, the topic of creative industries was introduced into the international economic and development agenda, drawing upon recommendations made by a High-level Panel on Creative Industries and Development. The UNCTAD approach to the creative industries relies on enlarging the concept of “creativity” from activities having a strong artistic component to “any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible” (UNCTAD, 2004).

UNCTAD definition of the “creative economy”

There is no unique definition of the “creative economy”. It is a subjective concept that has been shaped throughout this decade. There is, however, growing convergence on a core group of creative industries and their overall interactions both in individual countries and at the international level. Also, regardless of how the creative industries are defined and classified, there is no disagreement that they lay at the centre of what can be labelled in broader terms the “creative economy”.

The term “creative economy” appeared in 2001 in John Howkins’ book about the relationship between creativity and economics. For Howkins, “creativity is not new and neither is economics, but what is new is the nature and the extent of the relationship between them and how they combineto create extraordinary value and wealth”.¹⁶

Howkins’ use of the term “creative economy” is broad, covering 15 creative industries extending from arts to the wider fields of science and technology.¹⁷

For Howkins, there are two kinds of creativity: the kind that relates to people’s fulfilment as individuals and the kind that generates a product. The first one is a universal characteristic of humanity and is found in all societies and cultures. The second is stronger in industrial societies, which put a higher value on novelty, on science and technological innovation, and on intellectual property rights.

According the **UNCTAD definition of the creative economy** the “creative economy” is an evolving concept based on creative assets potentially generating economic growth and development:

- *It can foster income generation, job creation and export earnings while promoting social inclusion, cultural diversity and human development.*
- *It embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives.*
- *It is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy.*
- *It is a feasible development option calling for innovative, multidisciplinary policy responses and interministerial action.*
- *At the heart of the creative economy are the creative industries.*

¹⁶ John Howkins, *The Creative Economy: How people make money from ideas*. London, Penguin, 2001, 88-117.

¹⁷ According to Howkins, in 2000 the creative economy was worth \$2.2 trillion worldwide, and it was growing at 5 per cent annually.

1.4. How the audiovisual sector fits in the map of creative industries and why it is relevant?

Ever since creative industries started to be researched and followed for their performance and influence on the overall economy according to different reports the cultural and creative sector exhibited an impressive performance during the examined periods in different countries. For example, in the Handbook Economy of Culture in Europe during the years from 1999 to 2003 the nominal growth of the European economy was 17.5%⁷, the growth of the cultural and creative sector in the same years was 12.3% higher (in other words, the overall growth of the cultural and creative sector's value added was 19.7%). This means that the cultural and creative sector grew faster than the general economy and that it was therefore a vital driver for development in Europe.¹⁸

Furthermore the figures analysing the sector's growth and its contribution to overall wealth confirmed that the sector grew in economic importance and that its contribution to the general wealth of Europe has become more and more significant since cultural employment is growing faster than total employment and that cultural employment is of an "atypical" nature.

The audiovisual sector has a great economic potential and an important cultural and social impact for the development of European economy. Moreover, it can also play a key role in the emergence of European citizenship and identities since it has also potentials to build community support and to promote intercultural dialogue, as well as to increase mutual trust and awareness amongst Europe's cultures in order to develop its political and cultural potential.

Nevertheless, there is still a problem with defining the sector of audiovisual creative industries which includes motion picture, television, radio and other forms of broadcasting. The problem is similar to the issues shared by other creative industries' sectors: the audiovisual sector lacks a unified and clear cut definitions between different

¹⁸ According to the *European Agenda for Culture Handbook* in 2003 the turnover of the cultural and creative sector in Europe amounted to €654 billion that in terms of value added to the European economy as a whole represented 2.6% of Europe's GDP. When Europe's GDP is compared with that of other industries the relevance of this becomes clearer: e.g. real estate activities (including the development, buying, selling and letting of real estate) accounts for 2.1% of Europe's GDP – a figure that is inferior to the cultural and creative sector's contribution. According to the same report the economic contribution of the cultural & creative sector is also higher than that of the sector of food, beverages and tobacco manufacturing (1.9%), the textile industry (0.5%) and the chemicals, rubber and plastic products industry (2.3%). In the same document the report of *TERA Consultants (Building a Digital Economy: The Importance of Saving Jobs in the EU's Creative Industries*¹², March 2010) was quoted to have revealed that the cultural and creative sectors (including the cultural and creative industries) accounted for 4.5% of total EU GDP in 2008 and 3.8% of the workforce, and that the creative industry's GDP contribution is greater than the chemicals and plastic products industry (2.3 %) or real estate activities (2.1 %). See: European Agenda for Culture http://unctad.org/en/docs/ditctab20103_en.pdf, 5-6

products and media so there is an urgent need for its contextualising and update according the newly developed means of production, reproduction and distribution. The delimitations of audiovisual products and of the overall industries have become even more problematic particularly with the introduction of new ITC tools and the emergence of the new media and connectivity.¹⁹

Audiovisual industries can be accounted as one the most underestimated among the creative industries. Although their complexity and politically sensitive nature do have certain potentials to turn them in one of the major engines of the creative economy the audiovisual industry raise difficult challenges for governments. Particularly in developing countries there are high risks for large audiovisual industries exactly due to its delicate economic peculiarities, structural problems and low levels of investment. Many countries lack regulatory frameworks and need to establish different measurements for encouragement of high-quality audiovisual production.²⁰

Another problem is that this sector is one of the least researched subsectors and its development has not been adequately followed so data for audiovisuals are scarce and do not show this subsector's overall contribution to global trade and to the world economy.²¹

One of the most obvious examples of the under-researched audiovisual industry, particularly in terms of its contribution to global economy and in European cultural context, is the film industry. Prevailing trends are evident in the production, distribution and box office admissions only for certain regions or countries.

The difficulty in evaluation of the overall contribution of film industry to global economy is related to the fact that although fewer people are going to the cinema, increased sales of DVDs and growing interest in watching films on pre-paid cable or satellite TV channels and the Internet mean that more films are being seen. Therefore measuring the revenue for the film industry becomes more complex and besides the usual box-office sales should also include the revenue from music rights, television and satellite rights, video and Internet rights, merchandising, CD and DVD rentals, and copyrights for reproduction IPR (Intellectual property right)

¹⁹ For example, since cultural and creative content are mixed together with technical forms and media it is hard to say whether a digitized cartoon film represents an audiovisual product or a form of new media.

²⁰ Different incentives and support mechanisms are usually recommended to compensate for the lack of domestic facilities and venture capital. For developing countries, the key issue is the limited supply capacity of audiovisuals and the difficulty of accessing global distribution channels.

²¹ Although the figures in the UN *Creative Economy Report* indicated some trends that enabled both cultural and international trade policy for this sector, many issues are yet to be examined for a comprehensive analysis of market trends in audiovisuals such as: the regulatory regimes, market structure, specificities of each audiovisual product, diversity of business operations, different forms of marketing and distribution, and market access.

Additional problem is that the making, distribution and exhibition of films continues to be dominated by a small number of vertically integrated groups. This is evident from the fact that 80 per cent of all films shown worldwide are Hollywood productions that stands in a direct contradiction to European cultural policy aiming towards cultural diversity.

II. EUROPEAN AGENDA FOR CULTURE

2.1. Short description of the development of EU cultural policies with emphasise on audiovisual media services

Since 2008 a group of experts from Member States has been working on the topic of creative industries with a mandate focused on the strategic use of EU structural funds (in 2011)); export and internationalisation support strategies (in 2012-2013); and good practices on financial engineering for SMEs in cultural and creative sector (in 2013-2014). In 2008 a Civil Society Platform was also set up that in 2010 produced a policy recommendations and is still working towards topics such as Finance and taxation; Regional cohesion; Digital environment; Mobility; and Education and skills.

The Green Paper on cultural and creative industries was published in April 2010 under the title “Unlocking the potential of cultural and creative industries”, as a part of the European agenda for culture.²² This Green Paper launched a debate on the requirements of a creative environment for CCIs at the European level. The main objective of the paper was during the three month period of consultation (27.04.2010 to 30.07.2010) to gather views on various issues impacting the cultural and creative industries in Europe, from business environment to the need to open up a common European space for culture, from capacity building to skills development and promotion of European creators on the world stage.

The new EU programmes continue focusing on promoting the potentials of cultural and creative industries, particularly in the context of Creative Europe Programme and the Cohesion Policy instruments. Special windows of these programmes and regulatory framework was developed with a focus on audiovisual subsector. European audiovisual policy seeks both to provide a framework conducive to development of the audiovisual sector and to support the transnational dimension of this essentially cultural industry.

²² GREEN PAPER Unlocking the potential of cultural and creative industries <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0183:FIN:EN:HTML>

2.2. Audiovisual sector in the EC policies ²³

Audiovisual sector has always suffered from structural fragility and undercapitalisation. Particular problem is that the financiers see it as a high-risk business carried out mostly by micro-SMEs with few tangible assets and has become even more difficult due to the financial crisis. For these reasons, the European Commission took several initiatives such as to set up a MEDIA Production Guarantee Fund and other similar actions.²⁴

Yet, the main instruments for developing audiovisual creative industries is the *Audiovisual Media Services Directive (AVMSD)*²⁵ was designed to facilitate ‘business without frontiers’ in the Audiovisual sector.²⁵ A relevant instrument is also the *Audiovisual environment* which provides harmonised rules for all audiovisual media services (including on-demand services).²⁶ It is also important to mention the ‘country of origin’ principle. It allows media service providers to offer in other Member States audiovisual content complying with the laws of their own State. ‘Country of origin’ principle is an efficient tool for increasing the number of cross-border services but also for contributing to media pluralism and cultural diversity in the EU.

In addition, cultural diversity is fostered through promotion measures of European and independent audiovisual productions.²⁷ The recent awareness that the development of the EU audiovisual and information services industry requires a minimum level of protection of the general interests of the European citizen lead to two major recommendations on the highest level. The European Parliament and the Council adopted a Recommendation on the Protection of Minors and Human Dignity and on the Right of Reply (2006/952/EC, 20 December 2006) and a Recommendation on Film Heritage and the competitiveness of related industrial activities (16 November 2005).²⁸

²³2.2: Commission Working Document: The European Agenda for Culture – progress towards shared goals COMMISSION WORKING DOCUMENT The European Agenda for Culture – progress towards shared goals, Last Accessed 1 August 2013, http://ec.europa.eu/culture/our-policy-development/european-agenda_en.htm

²⁴http://ec.europa.eu/information_society/media/overview/index_en.htm; http://ec.europa.eu/culture/our-policy-development/european-agenda_en.htm

²⁵ This Directive replaced the ‘Television without Frontiers Directive’ in order to modernise the rules governing audiovisual content and to adapt them to the new Directive 2010/13/EU of the Parliament and the Council of the 10 March 2010 on the coordination of the provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive).

²⁶ The main objective of Audiovisual environment is to set in the conditions for the transmission across borders of audiovisual media services, thus creating a legal framework for the free circulation of European audiovisual content within the EU single market.

²⁷ Particularly important are the Articles 13, 16 and 17 of the AVMSD. For example, Articles 16 and 17 require Member States to ensure, where practicable and by appropriate means, that broadcasters allocate a majority of time on TV channels to European-made programmes and that a minimum proportion of viewing time is reserved for European works created by independent producers (or alternatively that a minimum programme budget is allocated by broadcasters to independent productions). http://ec.europa.eu/comm/avpolicy/reg/index_en.htm

²⁸ The first implementation report was published on 4 August 2008. One of the major issues that is addressed in the reports is the access of cultural institutions in the area of film heritage to the Culture Programme, in accordance with the principle of non-discrimination but the projects eligible for the MEDIA Programme could be excluded from the report.

These two recommendations deal with issues as media literacy, cooperation and sharing of experience and good practices between self-, co- and regulatory bodies, action against discrimination in all media, and the right of reply concerning online media. Member States must inform the Commission every two years of action taken in response to this Recommendation.

2.3. Support measures to the European audiovisual industry: the MEDIA Programme

The MEDIA programme was created in 1991 with the aim of supporting the European audiovisual industry. MEDIA programmes are imagined as measures to foster the adaptation of the European audiovisual industry to structural upheaval, the development of a propitious environment for the small and medium-sized businesses (which underpin the industrial fabric of the cinema and audiovisual sectors) and to support the creation of an environment which stimulates cooperation between businesses. The MEDIA programme is intended to make the European audiovisual sector more competitive.²⁹

As a consequence of the digital revolution and the enlargement of the EU, measures under MEDIA 2007 are constantly being adapted and structured in a growing number of different action lines: Training (Initial and Continuous) Development and producers' support, Access to finance for SMEs, Distribution (Selective and Automatic), Promotion (Access to the market / Festivals), Exhibition and New Technologies (Video on Demand and linear services /Pilot Projects).³⁰

The actions as MEDIA International Preparatory Action (2008-2010, budget: EUR 8 million) and MEDIA Mundus (2011-2013, budget: EUR 15 million, adopted in October 2009), aimed to explore ways of reinforcing cooperation between European and third-country professionals from the audiovisual industry on a basis of mutual benefit and to strengthen cultural and commercial relations between Europe's film industry and professionals from all over the world. In order to increase consumer choice these programmes also aimed towards bringing more culturally diverse products to European and international markets and towards creating new business opportunities for audiovisual professionals from Europe and around the globe.

²⁹ Besides the first MEDIA programme there have been four multiannual programmes. For example, MEDIA 2007 2007-2013 had a budget: EUR 754.9 million. A total of 2 billion euros inco-funding for the European audiovisual industry has been provided through MEDIA between 1991 and 2013. Productions supported by the MEDIA programme are of qualitative interest and show internationally recognised cultural potential; e.g. MEDIA-supported films compete in the most famous film festivals (Cannes Film Festival, Venice Festival, Berlinale).

³⁰ For example, each year, around 50 specialised training events for professionals are organised with the support of MEDIA and about 15 'Initial Training' support students, trainees and trainers. The MEDIA programme provides European independent production companies with financial support for developing their cinema and audiovisual projects: every year, 350 new European film productions are supported by MEDIA. Through the distribution schemes, more than half of the European films shown on European cinema screens benefit from MEDIA support. Distribution and promotion of European films outside their originating country both across Europe and worldwide (almost 60 % to 65 % of the total budget) are a clear priority. The MEDIA programme also supports cinema networks and more than 100 film festivals every year (on condition that they show at least 70 % of European films).

Other actions in relation to the distribution of audiovisual content over electronic networks include for example ‘Content online’, for which the Commission launched a first public consultation in 2006 that later resulted with a Content online platform.³¹

Particularly relevant for smaller countries that often cannot cope with large audiovisual industries are the other initiatives such as media literacy. This initiative emphasizes the urgent need to analyse and develop the ability to access the media, to understand and to critically evaluate different aspects of the media and media content as well as to enable the creation of communication in various contexts. Media literacy relates to all media and plays an important role in enhancing awareness of European audiovisual heritage and cultural identities and increasing knowledge of and interest in audiovisual heritage and recent European cultural works. Media literacy is a matter of inclusion and citizenship in today’s society.³²

The Commission actively promotes the development and exchange of good practice on media literacy in the digital environment through existing programmes and invites Member States and the media industry to increase people’s awareness of the many forms of media messages they encounter, be they advertisements, films or online content.

The main task of this platform is to steer and further promote the ECIA through an open method of coordination (28 partner organisations and 12 countries). ECIA combines policy learning with concrete actions on innovation vouchers, better access to finance and cluster excellence and cooperation. Its overall aim is to shape a community in Europe that actively supports creative industries as a driver for competitiveness, job creation and structural change by developing and testing better policies and tools for creative industries.

³¹The Communication on ‘Content Online in Europe’s Single Market’ of 3 January 2008 triggered another public consultation on further relevant issues. The result of this consultation was the ‘Content Online Platform’ gathering 77 experts from all relevant sectors (rights holders, collecting societies, creators, content providers, telecommunication companies / ISPs, consumers) that discussed new business models, legal offerings and the fight against piracy, management of copyright online, cultural diversity and protection of minors. In May 2009, the Content Online Platform published the Final Report: http://ec.europa.eu/avpolicy/docs/other_actions/col_platform_report.pdf

³²The European Commission’s initiative on media literacy responds to requests by the European Parliament and industry together with a number of Member States from 2007 when the Commission adopted a Communication on media literacy (the recommendation followed in 2009). http://ec.europa.eu/avpolicy/other_actions/content_online/index_en.htm

III. ENTREPRENEURIAL ASPECTS OF CULTURAL AND CREATIVE INDUSTRIES AND REVIEW OF RELEVANT CASE STUDIES AND SUCCESSFUL PRACTICES

3.1. National economic and cultural policies for stimulating creative industries and the audio-visual sector

One of the best examples of a major shift towards developing general entrepreneurship tools for cultural and creative industries was the establishing of the European Creative Industries Alliance (ECIAP) ³³The Policy Learning Platform of the European Creative Industries Alliance (ECIAP) has been set up with aims at bringing together regional and national policy-makers supporting innovative creative industries to develop “better practice” in support of service innovation in creative industries.

The European Commission entrusted the Study on the Entrepreneurial Dimension of the Cultural and Creative Industries ³⁴ to the Utrecht School of the Arts which co-operated closely with K2M Ltd: from knowledge to market and EurokleisS.r.l. The Study responded to the growing importance of the creative economy, and more specifically of the role of the Cultural and Creative Industries (CCIs). It aimed to provide a better understanding of the operations and needs of companies in the CCIs, especially small and medium-sized enterprises (SMEs). The Study provided an understanding of the key determinants for strengthening entrepreneurship for CCIs, such as: access to finance; market barriers; intellectual property rights; education and training; innovation; and collaborative processes.

The key challenges stated in the Study led to general recommendations for developing a conducive environment and support for each determinant, highlighting best practices and taking into consideration sector differences, the different levels of policy as well as the different development phases in which the CCIs find themselves. Throughout the Study, around forty Best Cases were singled out and illustrated key funding approaches and initiatives.

However, it is important to note that some of these examples are not generally applicable to different countries for various reasons and exactly because creative industries usually rely on a profound research and development of contextually relevant creative assets and cultural concepts.

³³ The Policy Learning Platform of the European Creative Industries Alliance (ECIAP) <http://www.howtogrow.eu/ecia/about-ecia/>

³⁴ Study on the Entrepreneurial Dimension of the Cultural and Creative Industries
http://ec.europa.eu/culture/documents/edcci_report.pdf

Eight of these studies of cases that supported and promoted the entrepreneurial dimension of the cultural and creative industries will be presented in this text.³⁵ Instead to focus on successful independent cases here the emphasis is particularly put on the cases relevant in establishing national funding for support of the development of the audiovisual sector of creative industries.

The reasons for singling out exactly these case studies as positive examples to be followed where applicable are that the initiators of most of these cases have put their focus on connecting economic tools with creative enterprises via regional networking and collaborative clusters. Through such cross-sectorial interlinking of various creative individuals and small businesses in a short time and with the support of local governments they far exceeded their initial investments and sometimes even outgrew their initial SME scope. Additionally only a couple of other examples could be added that are more relevant for the region of South East Europe.

3.2. Successful cases of supporting the entrepreneurship in cultural and creative Industries

CCI CASE 1

Crossover Labs United Kingdom

Crossover Innovations Lab is an international program based in London. It is a creative lab designed to explore the creative and commercial challenges of new media tools and to develop new content through them. Unlike other models of lab, Crossover does not work with pre-conceived proposals but aims at exploring a practical and dynamic range of techniques for developing multiplatform projects and provides a framework for the development of concrete projects, which result in the building of pitches and early stage concept prototypes. In the second phase, cross platform idea generation, participants create original ideas for cross-platform products and services. Perhaps one of the most indispensable aspects of the Crossover lab experience is the network that is established between participants. Crossover Labs engages professionals in a way that they may lack in their day-to-day work life. It challenges them to take up tools they are unfamiliar with and gain expertise in areas they previously may have had little to no knowledge about. The result is a regular output of well connected, inspired and innovative individuals from a wide spectrum of sectors, spurred to engage in crossdisciplinary exchanges for the betterment of their own professional careers and the industry as a whole. <http://www.crossoverlabs.org>

³⁵The Entrepreneurial Dimension of the Cultural and Creative Industries: Appendix 1 22, ec.europa.eu/culture/documents/edcci_appendix1.pdf

CCI CASE 2

Game Research for Training and Entertainment (GATE)The Netherlands

The goal of the Game Research for Training and Entertainment (GATE) is to substantially advance the state-of-the-art in gaming, simulation and virtual reality to creating highly effective entertainment products and experience learning systems. It aims to develop an international competitive knowledge base with respect to game technology, and to train the talent required to enhance the productivity and competitive edge of small and medium-sized creative industrial companies. The project is also aimed at improving substantially the competitiveness of companies producing (tools for) games and simulations by providing direct access to new technology and by technology transfer projects. The project is also hoped that will make people aware of the possibilities of gaming in public sectors such as education, health, and safety by performing pilots in these areas. As a result gaming and simulation will become more commonly applied in these sectors, leading to quality improvements and cost reductions. Even though this project does not provide direct support to SME's in the cultural and creative industries however GATE is not only about academic research into games and Game-technology.but through Knowledge Transfer Projects, Game Research constantly collaborates with small and medium sized enterprises and other research partners. Therefore knowledge questions provided by companies are developed into practical solutions. <http://gate.gameresearch.nl/index.php>

CCI CASE 3

b.TWEENDevelopment LabUnited Kingdom

London basedb. TWEEN offers a cutting-edge portal into the world of digital media. It was founded to provide a dynamic environment where members would feel safe to create and share ideas, and meet people who can help to turn good ideas into good products. In the UK,b. TWEEN has been acclaimed as “the designers of the future of digital business”. Among its activities, b.TWEEN organizes festivals where creative and visionaries with a commercial edge are encouraged to attend and exchange. Workshops on subjects such as location based narratives and other trends within the media world are also offered to participants Apart from the festival, b.TWEEN offers many ways for interested parties to get involved such as the Branding Talent competition in2009. In this competition, small creative companies and freelancers from across the digital media industries were invited to enter“seed ideas” to provide new ways for Shop Direct, a home shopping organization, to connect with their customers. <http://www.btween.co.uk>

CCI CASE 4

IMAGINOV France

IMAGINOV is a Lyon based regional cluster focused on video games companies. It was born out of the cluster/pole of competitiveness “Digital Leisure” that was acknowledged by the French government in 2007. The members of the organisation (around 210) represent 1,13 billion € of revenues and represent 12 700 of employments. Serious games companies have an exponentially turnover and have received specific support from the cluster through workshops and acting as market intermediaries as well as through subsidies for R&D. The region of Rhone Alpes has specifically provided preferential regulatory environment by giving a tax credit for video games industry (20%), access to subsidies for R&D through the pole of competitiveness funds. The Region Rhone Alpes has also encouraged innovation and new business models through several contests such as “Imaginov Commercial” and “Imaginov International”. 100 companies have been rewarded in three years.
www.imaginove.fr

CCI CASE 5

IFCIC Bank Loan Guarantee system for financing CCIs France

The Ministry of Culture and Communication and the French Ministry of Finance established IFCIC with the aim to contribute to the development of the cultural industry in France by making it easier for companies within the sector to obtain bank financing. IFCIC is a neutral and independent institution and is a limited private-sector company entrusted with a service of general interest. Its capital is owned by French banks, large public financial institutions, and the French State. The loans guaranteed by IFCIC cover most of the needs of companies, at all stages of their development. IFCIC does not give subsidies but rather guarantees the loans taken by CCI in the banks. The banks that work with IFCIC are not only given financial guarantees in the event that companies should fail, but also risk analyses that are specific to the cultural industries. IFCIC has equity of about € 16 million and two active guarantee funds with a total gross value exceeding € 75 million: the *Fonds de garantie Cinéma et Audiovisuel*, which is funded by the Centre National de la Cinématographie (CNC) and the *Fonds Industries Culturelles*, funded in large part by the Ministry of Culture. These funds enable IFCIC to guarantee up to € 273 million (IFCIC share), corresponding to total loans of the order of € 565 million. <http://www.ifcic.fr/englishversion.html>

CCI CASE 6

ICO Public credit institutions financing CCIs Spain

The Official Credit Institute is a public economic entity under the Ministry of Finance and Economy of Spain. The Institute has the legal status of a credit institution, with autonomy in its monetary and management matters. ICO promotes economic activities that are relevant for

society in cultural, innovative or/and ecological terms. Their investment in companies aims to boost sectors like the film industry, transport, technological innovation projects, renewable energies and the strengthening of Spanish companies abroad. As a public financial institution, ICO operates according to the principle of financial equilibrium so ICO collaborates with other financial institutions, serving financial needs that the private system does not cover, or only covers partially. The ICO is a specialised credit institution and regarding this aspect the ICO acts in two ways: one being as a line of meditation (the appropriations are requested in banks and thrifts), and second through direct operations (companies applying for funding directly to the ICO). Second, the ICO works as the State Financial Agency, managing funds that the government has expressly asked to go to those affected by situations of serious economic crises, natural disasters or similar situations. ICO promotes investment in SME's, the rental of housing and land development and promotes the internationalisation of Spanish CCI companies, strengthens the Spanish film industry and supports the development of large investment projects in Spain. www.ico.es

CCI CASE 7

Cultuur Invest Belgium - *Financial intermediary investing short and long term loans in the CCIs*

Cultuur Invest is an independent investment fund managed by the Participatie Maatschappij Vlaanderen (PMV). The fund is aimed at entrepreneurs in the cultural industries, who have products or services with a cultural content, creation and marketing. With the support of Cultuur Invest, these entrepreneurs seek independence and economic growth through a balanced business model. The emphasis is put on investment, as opposed to being a grant providing body, and therefore this initiative expects a financial return. The investments are made in the sectors of: new media and computer games; audiovisual and digital design; the music industry; fashion design; printed media and graphic design; publishers and booksellers; musical and performing arts; distribution in the visual arts. The investment body currently holds a capital of €21.5 million. With an assumed rate of return of 3.5 million euro per year, after twelve years the fund is expected to have an impact on the market of €100 million. This objective can only be achieved if Cultuur Invest operates as a rolling fund, meaning that the funds that are invested make a profit. The basis for Cultuur Invest to invest is therefore first and foremost a business plan and a competent team of entrepreneurs, with cultural criteria taking on an important but secondary role. Besides loans, Cultuur Invest can also participate in the capital of the companies, but does this only by raising the existing capital. Both are financial instruments designed to give a boost to the cultural entrepreneurs and thus open them to greater opportunities. Furthermore, Cultuur Invest also collates data and information from a range of organisations invested in creative and cultural industries. www.cultuurinvest.be/

CCI CASE 8

Advantage Creative Fund *Venture Capital for CCIs*(ACF)United Kingdom

The investment fund is operated by Advantage Creative Fund (ACF) and was setup in 2003 as the first venture capital fund dedicated to investing in the creative industries. The fund was set up when it was discovered that the creative industries have traditionally been disadvantaged when it comes to sources of investment support due to their intangible products and dynamic nature. The fund operates by making investments from £10,000 and up to a sum of £250,000 in creative companies based in the West Midlands and in return these take a small equity stake. The interesting part of this project is that it is open to proposals from all kinds of creative businesses including start up enterprises and established companies. There is an amount of €280 000 on equity investment.

Unlike most venture capital funds, this project even though it is publicly funded, aims at strengthening and developing the creative industry sector throughout the West Midlands. The project is financed by the EU Regional and Development FUND of the EU Cohesion Policy. www.advantagecreativefund.co.uk

IV. CONCLUSION AND RECOMMENDATIONS

1. Why the audiovisual cultural and creative industries are relevant to the Macedonian society?

In a very exhaustive study about the cooperation in the field of television cooperation Dr. Dona Kolar-Panov exposed all advantages and downfalls of the creative industries development in South Eastern Europe reflecting on the cultural and socio-political specificities in the region.³⁶ From her research it becomes obvious that although the potentials of creative industries and collaborations in audiovisual sector are indisputable the support from the state funding is lacking and there is still doubt in the eventual effects of such structural and systemic support of private enterprises.

This scepticism comes exactly because of the specific historical and economical background of most of the SEE societies. Similar conclusions are drawn by the other researchers in the region such as Inga Tomić-Koludrović and MirkoPetrić who addressed the importance of

³⁶ Dona Kolar Panov, "Television and cultural cooperation in Southeastern Europe", *Cultural Transitions in Southeastern Europe*. N. Švob- oki , Zagreb, Institute for International Relations. Culturelink Joint Publication Series, 2004, No. 6:67-81.

situating the economic aspects of creative industries in the context of socio-political specificities of certain societies.³⁷

2. Projects in this field of researching cultural and creative industries in Macedonia

The first mapping and strategy for creative industries in Macedonia was published in 2010 as a result of the joint project commissioned by the Ministry of Culture of Macedonia and the British Council in Macedonia.³⁸ The expert team provided basic research and strategic directions for the national cultural policies about creative industries' development.

Following these recommendations the Skopje City Council in its Strategy with Action Plan for Development of City Skopje for the period 2012-15 as the Strategic Aim 6 listed Incentive of Creative Industries.³⁹

Prior to this project several individual experts and organisations were involved in projects addressing creative industries in Macedonia, mainly on theoretical and academic level. For example, the Visual and Cultural Research Centre at the Euro-Balkan Institute in Skopje conducted two summer schools in Ohrid, in 2007 and in 2010 with a focus on academic research of development of cultural policies, creative industries and cultural diversity: The Jean Monnet Life Long Learning Programme supported the Summer School "INTEGRATING CULTURES/NEGOTIATING NEW SUBJECTIVITIES" and CEI Summer School "Global Economy and Creative Industries".⁴⁰

Skopje City became a partner in different projects and organisations focused on creative industries, e.g. the project *Creative Cities*, run by British Council in various European cities

³⁷ Inga Tomi - Koludrovi and Mirko Petri, "Creative Industries in Transition: Towards a Creative Economy?", *Cultural Transitions in Southeastern Europe*. N. Švob - oki, Zagreb, Institute for International Relations. Culturelink Joint Publication Series No. 6, 2004, 7-23.

³⁸ *Mapping of Creative Industries*, Expert Team/Coordinator Antoanela Petkovska (), Ministry of Culture of Republic of Macedonia, British Council in Macedonia, Skopje, 2010.

³⁹ The Strategy with Action Plan for development of Culture of City Skopje for the period 2012-2015 was voted on the basis of Article 36 from the Law of Local Self-Governance and Article 10, Point 5 of the City Skopje Law the City Council of Skopje on 4 June 2012.

⁴⁰ "Integrating Cultures/Negotiating New Subjectivities", Director: Dr. Suzana Milevska, Visual and Cultural Research Centre, Euro-Balkan Institute, Ohrid Summer University Programme, supported by Jean Monnet LLLP, 2007, 24.06-08.07. 2007; "Global Economy and Creative Industries", 21 June - 04 July 2008, Ohrid, Summer University Programme, supported by CEI and the Ministry of Foreign Affairs of Republic of Macedonia.

and the Network of Creative Cities Les Rencontres. As one of the main activities of this strategic line listed in the Strategy is the Festival Creativa.

However, the fact is that audiovisual industries have not been specifically targeted by either of these documents or projects. Also, because of difficulties with adequate access to relevant statistical data an efficient map of the figures of the contribution of CCI in Macedonia has yet to be specified.

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Creative Economy Report, United Nations, 2010, Last Accessed 1 August 2013 http://unctad.org/en/docs/ditctab20103_en.pdf

European Commission: http://ec.europa.eu/culture/our-policy-development/cultural-and-creative-industries_en.htm

European Creative Industries Alliance: <http://www.howtogrow.eu/ecia/>

European Agenda for Culture http://unctad.org/en/docs/ditctab20103_en.pdf

Mapping the Creative Industries Toolkit

http://www.britishcouncil.org/mapping_the_creative_industries_a_toolkit_2-2.pdf

GREEN PAPERUnlocking the potential of cultural and creative industries

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0183:FIN:EN:HTML>

EUCLID <http://www.euclid.info/>

TRANSFORM, Creative Hypes, European Institute for Progressive Cultural Politics EIPCP

<http://transform.eipcp.net/transversal/0207www.eipcp.net>