An International Comparative Quick Scan of National Policies for Creative Industries

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Executive Summary

Background of the research

1. The Dutch Government has commissioned a quick scan of explicit national policies for creative industries. This explorative international comparative study focuses on policies aiming to stimulate economic development of creative industries. It is concerned with tailor-made policies for creative industries, dedicated policies for its sub-sectors and explicit attention for creative industries in standard economic policies.

2. The investigation includes examples from Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Ireland, New Zealand, Norway, Portugal, Singapore, South Korea, Spain, Sweden, The Netherlands and the United Kingdom. The examples also come from regions for Australia, Austria, Belgium, Canada, Germany and Spain. For the quick scan approximately 1000 policies have been examined in 18 countries.

3. Creative industries comprise three groups: arts (performing arts, visual arts and photography, cultural events, etc.), media and entertainment (film, audiovisual sector, literature and journalism etc.), and creative business services (design, fashion, architecture, new media and gaming, advertising etc.).

4. The quick scan considers the following mainstream economic policies that are used for creative industries:

    - Stimulating innovation in creative industries;
    - Promoting entrepreneurship in creative industries;
    - Supporting creative entrepreneurs to get access to venture capital;
    - Market development: facilitating creative entrepreneurs to develop their markets at home but especially abroad;
    - Fostering the development of creative clusters;
    - Safeguarding intellectual property rights to encourage creativity and assure rewards to creators;
    - Other policies that stimulate economic development in creative industries but do not fit in the adopted classification.

The results

5. The quick scan shows that the awareness of the economic potential of creative industries is rising. Many countries have commissioned studies into the economic impact of creative industries since the first Creative Industry Mapping Document published in the United Kingdom in 1998. Both economic and cultural policymakers have been involved in those studies. In some other countries the national attention for the economic potential of creative industries is also growing.

6. A key question is: are creative industries primarily the subject of economic *or* cultural policy? The explorative study shows that national governments consider it to be both. The most interesting policies combine cultural objectives (diversity, quality and distribution) and economic objectives (innovation, entrepreneurship, export, investment, clustering and economic growth). The policy schemes included in the research indicate that the majority of policies stimulating the economic development of creative industries originate from, and are funded by, the cultural sectors. The awareness of its economic potential has increased but it has not resulted in an appropriate balance between mainstream economic policy and cultural policy.

7. The majority of countries in the investigation do not have a comprehensive national strategy for creative industries. Nonetheless, the number of countries with an integrated national strategy for creative industries is growing. Most of the countries in the research have integrated strategies for sub-sectors of creative industries (such as design, audiovisual, media and gaming).

8. Of course, creative industries are not excluded from generic economic policies but it appears to be difficult to meet the criteria to qualify for support for these policies.

9. An explicit strategy for creative industries also raises the issue of priorities. In some cases, economic policies focus more on creation whereas other countries prioritise distribution. Most countries though have explicit policies for creation and production on the one hand and for distribution on the other. Generally speaking, the latter is better integrated in standard economic policies than the first.

10. Increasingly, the delivery of the policies for creative industries, as well as for policies aiming to stimulate sub-sectors, are put in the hand of arm's length organisations. These organisations are funded from various public sources. These organisations give account for their activities to the Ministries involved. In some cases, special workgroups with representatives of Ministries and other public stakeholders supervise the national strategy.

11. What is the role of national governments in the policies for creative industries? What should be done locally and what nationally? There is no unambiguous answer to this question. It depends very much on the type of policies. The national level is leading for international market development, venture capital schemes and copyright policies (in relation to supranational policies). Local and regional governments are leading in creative cluster policies and entrepreneurship. Innovation policies give a mixed picture as all levels of government are strongly involved. Nevertheless, national governments are in charge of the most important innovation policy schemes.

12. Innovation, entrepreneurship and market development are the most popular economic policies for creative industries. Venture capital becomes more important but is not in the same league.

13. Standard innovation policies mainly deal with technological innovation but sometimes also with non-technological innovation. The latter is particularly important for creative industries.

14. Most of the selected countries and regions have developed special policies promoting innovation in creative industries. Several different and interactive trends have emerged within innovation policy. Many national governments are developing policies and schemes to create and foster networking, creative partnerships and collaborative strategies among different sectors and actors, and among different disciplines as a way to affect and stimulate innovation. R&D, both technological and non-technological, has emerged as a key strategy to develop a strong creative sector and develop innovative projects. R&D schemes and funds are being set up to foster projects at the intersection between cultural and business sectors to encourage specific creative disciplines that are critical to the national cultural development, or to make a better use of promising technology. The majority of the initiatives in this area are mainly directed to the creation/production phase. Specific policies for sub-sectors are present; the majority can be found in design, film and game.

15. In some of the countries, policymakers do not see the need for special policies for creative industries and creative entrepreneurs are treated just like any other entrepreneur. However, the overall picture is that most of the selected countries and regions have developed special policies promoting entrepreneurship for creative industries. The majority of these initiatives are developed in partnerships involving government departments, traditional cultural institutions, (higher) educational institutions and specialised agencies for (branches of) the creative industries. Popular policies for creative entrepreneurship are special training programmes, financing the use of specialist consultancy services, workshops for creative entrepreneurs, special scholarships and leadership programmes. Most countries have special policies to facilitate international market development for creative industries. It is also clear that there is a trend to incorporate the creative industries in traditional economic export promotion. Generally speaking, the approach to creative industries is not fundamentally different from other selected sectors for international market development. The differences lie in the adaptations to the specific circumstances of creative industries. Usually, representatives of creative industries are involved in fine-tuning of the policies for their industry. At the same time broad strategies for market development in creative industries have also come from the field of culture and education. However, the majority of policies are tailored to (a group of) specific sub-sectors. Other specific trends are the policies to promote gaming as an export sector and the role of design as an export tool for other sectors.

16. Few countries have developed policies to raise opportunities for creative industries regarding access to venture capital. The general picture is that it is not a problem of availability of funding in general, but the selected policies address the access to funding together with improving entrepreneurship in creative industries. For example, efforts are made to raise awareness within banks and financial institutions on the commercial potential and investment opportunities in creative industries. Specific policies for sub-sectors are predominant. Creative industries have recently started to apply also to funds for general industries (e.g. start-up funds, technology funds, etc.). However, the research indicates that establishing links between creative industries, venture capital funds and other capital funds and business networks could be improved.

17. Promoting the development of economic clusters is fashionable in economic policies. The idea behind the development of creative clusters is that cultural industries have strong place-bound characteristics, relying on local production networks. Creative clusters are usually developed and initiated by local or regional governments through public-private partnerships. However, a growing number of national governments recognise the importance to promote and foster the development of creative clusters. National creative cluster policies are mainly part of the national industrial strategy aiming at the creation of innovation or competitive clusters. The main trend emerging at national level is the development of creative clusters fostering innovation through strong links between art, new media and technology, education and businesses. The creative cluster policies are therefore strongly linked to innovation and entrepreneurship policies.

18. In recent years intellectual property rights laws have become stronger. In general, the powers of the national authorities in this field are limited. Some OECD countries have extended the duration of copyright. Artist's Resale Right (*droit de suite*) is now regulated in several countries in Europe. In December 1996, more than hundred countries adopted the WIPO Copyright Treaty and the WIPO Performances and Phonograms Treaty with the aim to adapt existing international copyright conventions to digital technology. In accordance to the WIPO Treaties, European countries have implemented or are implementing the EU Directive concerning the Harmonisation of Particular Aspects of the Copyright and Related Rights in the Information Society (Directive 2001/29/CE). The main challenges intellectual copyright is facing come from the processes of digitalisation of cultural products and their distribution via internet: stimulus to creation and protection versus diffusion. A new and fair use of intellectual property is being promoted, allowing exceptions for the utilisation of information for educational or cultural purposes, the promotion of innovation, and R&D activities. New alternatives to licensing within existing intellectual property right legislation have emerged, like the well known example of Creative Commons.

19. In the category of other relevant policies, the international cooperation of the Nordic countries and the Baltic States is very interesting. It is unique in its kind and could lead to important lessons for other EU-members.

20. A question that emerges from the international quick scan of policies for creative industries is: what is the role of the European Union? Including the creative industries in the Lisbon strategy is one, but will the European Union stimulate inventive economic policies for creative industries?

21. Finally, what are the lessons from the research for countries that want to set up a national policy scheme to stimulate creative industries? The examples have certainly raised many questions about the applicability for nations that are exploring their possibilities. It depends very much on the cultural, economic and administrative context. There is no standard recipe but each country that aspires to develop national creative industries policies needs to answer critical questions such as:

    - What is the economic impact of creative industries and what are key strengths of creative industries?

    - What are crucial elements in a national strategic framework for creative industries?

- What is to be preferred: a generic economic policy with the assumption that it caters for the creative industries versus special policy schemes for creative industries or its sub-sectors?

- What sub-sectors should be prioritised?

- How to integrate explicit policies for (parts of) creative industries in both mainstream economic policies and cultural policies?

- What is the best way to deliver these policies?

- How to evaluate these policies aiming for economic and cultural objectives?

There are no clear-cut answers to these questions as explicit policies for creative industries are a relatively new phenomenon. However, the questions could stimulate the national debate on creative industries and it could also energise the exchange of experiences on the European level.

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Preface

The report at hand charts and compares explicit national policies for creative industries in seventeen developed countries. The purpose of the study is to present a selection of interesting policies to a broader Dutch and European audience that could be another impulse to the debate on creative industries both in the Netherlands and the European Union. The explorative study has been carried out by the European Institute for Comparative Urban Research (EURICUR) of Erasmus University Rotterdam on the invitation of the Ministry of Education, Culture and Science of the Netherlands.

The research has been supervised by a committee composed of Bart Hofstede (Ministry of Education, Culture and Science), Jasper Kraaijeveld (Ministry of Economic Affairs) and Ron Reeder (Ministry of Education, Culture and Science). The EURICUR research team thanks the members of the supervisory committee for their co-operativeness and constructive contribution to the research. We also like to thank Yolanda van Heese (Ministry of Economic Affairs) for her comments on the draft report.

We have worked on this international comparative quick scan of explicit national policies for creative industries from December 2006 to May 2007. It has been a challenging and sometimes demanding research project as the number policies to be considered seemed infinite. Nevertheless, we have work on it with great pleasure and enthusiasm. Our special thanks go to our dedicated student assistants: Juliana Salazar and Arzu Uraz. We could not have completed the study without their help. We would also like to thank Christian Berger, Anass Selmani and Luís Carvalho for their support.

Finally, we would like to thank all those persons across Europe and elsewhere that responded to our questions and requests for information. It would not have been possible to complete the study in time without their quick response, professional comments and advice.

Rotterdam, May 2007
Erik Braun & Mariangela Lavanga

1 Introduction

Since the late 1990s the interest in creative industries has been growing worldwide. The Dutch Government issued a so-called 'Mapping Document' on creative industries in The Netherlands in June 2005[1]. The Mapping Document is the synthesis of a substantial research project initiated by the Dutch Ministry of Education, Culture and Science and the Ministry of Economic Affairs. The Mapping Document is based a on a range of research reports dealing with the definition of creative industries, assessing its economic impact in The Netherlands, identifying bottlenecks in creative production and exploring the role of (national) government.

The abovementioned research project is the result of the national debate on the importance of creative industries. More importantly, it is accompanied by the first strategy to boost the economic utilisation of culture and creativity in the Netherlands. The Dutch government has launched an experimental programme for creative industries to make the most of the economic potential of culture (including the Creative Challenge Call).

At the European level, the first ever study on the economy of culture in Europe (*The Economy of Culture in Europe*, 2006[2]) is a milestone in raising the awareness of the links between economy and culture. This study initiated by the European Commission reveals the direct as well as indirect contribution of the cultural and creative sectors towards the competitiveness of the European Union.

The Dutch Government has commissioned an international *quick scan* into explicit national policies for creative industries. The international comparative explorative study focuses on policies aiming to stimulate the economic development of creative industries. What policies have been developed for creative industries in Europe and elsewhere? What are the objectives, how does it work and what are the motives behind these policies? What are the trends and recent developments and what policies are interesting for a wider Dutch and European audience?

Research approach

It is important to note that the present research is a *quick scan*: an explorative study into best practices for national policies towards creative industries. It does not intend to map all the policies for creative industries in Europe and in other developed regions of the world. In our investigation we have included examples from: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Ireland, New Zealand, Norway, Portugal, Singapore, South Korea, Spain, Sweden, The Netherlands and the United Kingdom. The selection has been made from 'developed countries' - most of the countries are OECD

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[1] Raes, S.E.P. and B.P. Hofstede (2005) (eds.) *Creativiteit in kaart gebracht. Mapping document creatieve bedrijvigheid in Nederland*. Joint publication of the Ministry of Education, Culture and Science and the Ministry of Economic Affair.

[2] The study into the Economy of Culture has been carried out by KEA European Affairs working together with Media Group (Turku School of Economics) and MKW Wirtschaftsforschung GmbH.

members. Also, the information on the *Compendium of Cultural Policies and Trends in Europe* website[3] has been used for a first selection. Other important selection criteria have been the awareness of creative industries, the explicit national policies for creative industries and the reputation as leading countries with regard to national policies for creative industries.

Australia, Austria, Belgium, Canada and Germany are federations. Officially, Spain is not a federation, but its administrative organisation gives considerable power to the regions. For these countries, we have selected interesting regions in terms of policies for creative industries: Australian Capital Territory, New South Wales, and Western Australia (Australia), Vienna (Austria), Flanders (Belgium), Quebec, Ontario and British Columbia (Canada), Catalonia (Spain) and North Rhine Westphalia (Germany).

Notwithstanding the limitations mentioned above, we have examined more than 1000 policies in 18 countries assessing the objectives, instruments, delivery and organisation. Naturally, the selection of policies included in this quick scan is related to the selection of countries. The quick scan comprises contemporary policies with an economic rationale and assessment of those policies in the selected countries. The study is not an independent evaluation of each of these policies. It brings the reader up to date with the trends in national policies for creative industries and it highlight examples of policies from the selected countries that are interesting for a wider audience. The boxes on interesting policies summarise their objectives, motives, instruments and results (if available).

The structure of the report is as follows: in the next section (2) we discuss creative industries, its definitions and our use of the concept in this comparative study. In section 3 we discuss the national policies aiming to stimulate the economic development of creative industries that are included in the research. Section 4 comprises the most important general observations concerning all the policies for creative industries. Sections 5 to 11 discuss trends, developments and best practices for each of the selected policy areas. Section 12 contains the final conclusions.

[3] *Compendium of Cultural Policies and Trends in Europe* website www.culturalpolicies.net.

2 Creative industries

The study at hand does not intend to replicate the work done for the Dutch Mapping Document, nor the report on the economy of culture in Europe. It is certainly not the objective to review all possible definitions of creative industries. However, we cannot neglect the international debate on this subject entirely as it affects the international comparison.

The notion of creative industries emerged in the 1990s. It really took off with the launch of the inter-departmental *Creative Industries Taskforce* in the UK in 1997. The Taskforce's first report included a definition for creative industries that is still relatively popular: "activities which have their origin in individual creativity skill and talent and which have the potential for wealth and job creation through the generation and exploitation of intellectual property"[4].

Notwithstanding the relative popularity of the concept produced by the UK's Creative Industries Taskforce, we cannot label it as the internationally accepted definition of creative industries as there are many other definitions. Furthermore, the definition of the Creative Industries Taskforce is also criticised for being incoherent and vague and for not complying with standard economic practice in defining industries and sectors. There is also considerable criticism stating that the definition including 13 sectors is too broad[5]. For example, commentators question the inclusion of advertisement or software development as a whole. Other commentators point to activities that in their opinion should have been included, but are not, such as cultural tourism.

The discussion on the definition of the UK's Creative Industries Taskforce illustrates part of the debate that is now going on in many countries concerning creative industries: what to include and what not? The reality is that there are many definitions used by academics and policymakers, some are broader and others are more narrowly defined. The reality is also that there are many countries, policy documents and literature that use the term creative industries without clearly defining it and without transparency in the use of data to measure and compare them.

A final remark that should be made concerning definitions is that for some researchers and policymakers, the creative industries and the cultural industries are the same. For example, authors such as Hesmondhalgh & Pratt (2005)[6] see creative industries as a more popular synonym for cultural industries. Others distinguish between the two and see a development from cultural industries into creative industries (Cunningham, 2002)[7]. This variety, or ambiguity if you will, concerning the description of creative

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[4] See also the DCMS website www.culture.gov.uk.

[5] Architecture, advertisement, arts and arts fairs, crafts, design, fashion, film, interactive entertainment software (such as gaming), television and radio, performing arts, publishers and software

[6] Hesmondhalgh, D. and A. Pratt (2005) Cultural industries and cultural policy. *International Journal of Cultural Policy*, 11 (1): 1-13.

[7] Cunningham (2002) From culture to creative industries: theory, industry and policy implications. *Media International Australia, Incorporating Culture & Policy*, 102: 54-65.

industries undoubtedly makes our international comparative study more difficult. Nevertheless, it is by no means an impediment as we look for international best practices.

At the European level the debate on creative industries started only recently. When the EU Heads of State and Government met in March 2000 at the European Council in Lisbon they agreed on the ambitious goal of making Europe by 2010 "the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion". However the role of the cultural and creative industries within the Lisbon Agenda (2000) was still largely ignored. The main focus was on the ICT industries.

Following the increasing international debate on cultural industries, the European Parliament made a specific request in 2003 to the Commission to identify priority actions to promote cultural industries and to examine whether it is possible to draw up a definition for cultural and creative industries (European Parliament, *European Parliament Resolution on Cultural Industries*, 2003). The European Parliament asked the Commission to elaborate a study in order to create a European map of cultural industries. The European Parliament Resolution on Cultural Industries (2003) stressed the need of developing European indicators on cultural industries, bringing Eurostat cultural industries statistics in line with international standards and gathering data on employment, intellectual property rights, etc.

As mentioned in the introduction, the first official EU-study on the economy of culture in Europe was prepared for the European Commission (Directorate-General for Education and Culture). The study is the first attempt to capture the direct and indirect socio-economic impact of the cultural sector in Europe, and at the same time assessing its contribution to the Lisbon agenda, in particular in terms of growth, competitiveness, jobs, sustainable development, and innovation (KEA, *The Economy of Culture in Europe*, 2006). Recently, the Council of the European Union decided to integrate creative industries into the Lisbon strategy.

Until now there is no official definition of cultural or creative industries at the European level. The definition of culture the Member States agreed upon is the Eurostat definition (Eurostat, *Cultural Statistics in the EU – Final Report of the Leadership Group on Cultural Statistics (LEG-Culture),* Luxembourg 2000). According to the Eurostat definition, activities incorporated within cultural policy are those dealing with preservation, creation, production, dissemination, trading and education, in all cultural goods and services in the artistic and monumental heritage, book and press, visual arts, architecture, performing arts, audio and audiovisual media/multimedia.

Table 2.1: The Eurostat LEG-Culture definition of culture

Artistic and monumental heritage	• historical monuments • museums • archaeological sites • other heritage
Visual arts	• visual arts (incl. design) • photography • multidisciplinary
Architecture	
Archives	
Libraries	
Book and press	• books • newspapers and periodicals
Performing Arts	• music • dance • music theatre • drama theatre • multidisciplinary • other (circus, pantomime, etc.)
Audio and audiovisual media / multimedia	• film • radio • television • video • audio records • multimedia

The study *The Economy of Culture in Europe* (2006) proposes a new definition of cultural and creative industries. It distinguishes between:

- a cultural sector constituted of traditional art fields and cultural industries whose output are exclusively cultural, and
- a creative sector which gathers the remaining industries and activities that use culture as an added-value for the production of non-cultural products (see also Table 2.2).

Table 2.2: Proposed definition of cultural (grey) and creative (yellow) industries in the study The Economy of Culture in Europe (2006)

Circles	Sectors	Sub-sectors	Characteristics
Core arts field	Visual arts	Crafts, paintings, sculptures, photography	• Non industrial activities • Output are prototypes and "potentially copyrighted works" (i.e. these works have a high density of creation that would be eligible to copyright but they are however not systematically copyrighted)
	Performing arts	Theatre, Dance, Circus, Festivals	
	Heritage	Museums, Libraries, Achaeological sites, Archives	
Circle 1: Cultural industries	Film and Video		• Industrial activities aimed at massive reproduction • Outputs are based on copyright
	Television and Radio		
	Video games		
	Music	Recorded music market, Live music performances, Revenues of collecting societies in the music sector	
	Books and press	Book publishing, Magazine and press publishing	
Circle 2: Creative industries and activities	Design	Fashion design, Graphic design, Interior design, Product design	• Activities are not necessarily industrial, and may be prototypes • Although outputs are based on copyright, they may include other intellectual property inputs (e.g. trademark) • The use of creativity is essential to the performance of these non cultural sectors
	Architecture		
	Advertising		
Circle 3: Related industries	PC manufacturers, MP3 player manufacturers, mobile industry, etc.		• This category is loose and impossible to describe on the basis of clear criteria; it involves many other economic sectors dependent on the previous circles such as the ICT sector.

Explanation:	
	Creative industries
	Cultural industries

Source: The Economy of Culture in Europe (2006)

We consider the Eurostat definition and the proposed definition in the *Economy of Culture in Europe* (2006) important starting points for our international comparative investigation. Another important consideration for the investigation comes from the Dutch government in *Our Creative Potential* (2005). We take on board one of the principles in that document: to make "no normative difference between creative industry, cultural industry, art or entertainment: it concerns all industries in which creativity is the crucial production factor". This is an important observation as these normative distinctions might vary among countries.

For our comparative analysis, we have resumed all the cultural domains in three main groups (see also Table 2.3):

- arts (performing arts and photography, visual arts and cultural events, etc.);
- media and entertainment (film, audiovisual sector, literature and journalism etc.);
- creative business services (design, fashion, architecture, new media and games, advertising etc.).

This classification is taken from the Dutch definition of creative industries used by the Dutch Ministry of Economic Affairs and Ministry of Education, Culture and Science in the publications *Mapping Document* (2005) and *Our Creative Potential* (2005). This definition is in line with the Eurostat LEG-Culture (2000) and *The Economy of Culture in Europe* (2006) definitions. The classification is a starting point for the explorative research and subscribing to this classification also helps to steer away from the debate on issues of definition.

One important difference between the proposed European definition and the Dutch definition is that the latter also includes the so-called business column. The Mapping Document distinguishes three stages:

- the initial creation;
- tangible production, and
- distribution and the retail trade.

These dimensions are illustrated in the diagram below (see Table 2.3). From the diagram we can read two definitions: a narrow definition that covers only those sectors in which the initial creation takes place and a broader definition including several creative sectors engaged in production, distribution and retail. Note that the broader definition still excludes production, distribution and the retail trade in the branches categorised as *creative business services*. The argument in the Mapping Document for that exclusion is that the link with creativity is much weaker.

As said before we adopt the broad definition of the Mapping Document, but we think it is necessary to introduce one modification for the research. We opt for two instead of three stages in the business column, which mainly represent and resume the stages of creation versus marketability:

- creation and production (we combine the strict definition of creative industries with part of the broad definition, including several creative industries engaged in production), and
- distribution and the retail trade (marketability).

The argument for this modification is that it sometimes very difficult to separate the creation and the production of creative products.

Table 2.3: Branches of creative industries:

	Creation	Tangible production	Distribution and the retail trade
The arts	• Visual arts and photography • Performing arts: music, dance, theatre • Leisur centres, organisation of cultural events	• Visual arts and photography • Production of performing arts: music, dance, theatre • Reproduction and publication of CDs and DVDs • Leisure centres	• Musuems and exhibition areas, exhibitions, art auctions, art libraries, art galeries • Theatres and concert halls • CD and DVD stores • Leisure centres, cultural events
Media and entertainment	• Film: scenario, scriptwriting, and other pre-production • Idem for radio and television • Literature: novels, poetry, non-fiction • Journalism	• Film production incl. supporting activities • Production of radio and television programmes • Publishers and printing houses • Daily newspaper publishers and printers	• Film distribution, film theatres, video shops • Broadcasting organisations • Public libraries, booksellers • Public libraries, stores selling books, magazines and newspapers
Creative business services	• Industrial design, fashion design, graphic design • Creative ICT: games, new media • Architecture, urban development design, landscape architecture • Advertising	• Manufacture of furniture, clothing, spectacle frames, cars, etc. • Creative ICT, games, new media • General civil and commerical and industrial building, project development • Printing business	• Trade in clothing, spectacles, furniture, cars, etc. • Trade in computers and software • Project development; trading in real estate • Other advertising services

Explanation:

Strict definition: creation
Loose definition: creation, tangible production, distribution, and the retail trade
Not belonging to creative industries

Source: The Mapping Document (2005) and Our Creative Potential (2005)

3 National policies for creative industries

The Mapping Document highlights the link between two worlds: culture and economy. This link has several dimensions. For example: how does culture (in particular the supply of cultural amenities) contribute to economic development? Or vice versa, what level of economic development is needed to sustain a certain level of supply of culture? A key question in this investigation is: how to develop the economic potential of culture? This is where creative industries and, more particular, government intervention to stimulate creative industries become relevant. It is important to understand the special circumstances of creative industries before we discuss the options for government intervention. Canoy, Nahuis and Waagmeester (2005)[8] summarise some of the peculiarities of the markets for creative products. Table 3.1 lists the *characteristics of the creative products*. These characteristics concern the demand side, the supply side and the market results. These characteristics are also useful for the comparative research. They could be motives for national governments to set up national policies for creative industries.

Table 3.1: Characteristics of the creative products

Demand side	Nobody Knows	Generally speaking there is more uncertainty and higher risk concerning a new cultural product
	Time Flies	Extreme volatility of preferences for cultural products
Supply side	Small is beautiful	Creative industries are characterised as small scale production
	L'art pour L'art	Many creative people work from an intrinsic motivation (financial compensation is not the main driver of creativity)
	Complex interactions	Many creative products are the result of the collaboration between several groups of professionals
	One or many	Can the product be reproduced?
Market results	Something for everyone	Differentiated demand and supply and horizontal differentiation; note that there is no perfect substitute for a creative product
	The best and the rest	Product differentiation leading to vertical differentiation
	Eternal fame	Some creative products create eternal cultural value

What policies should be considered for the comparative research? Standard cultural policies (such as financial support for a traditional museum or a modern dance production) are not the first concerns for

[8] Canoy, M., Nahuis, R. And D. Waagmeester (2005) *De creativiteit van de markt; verkenning van de rol van de overheid bij creatieve industrieën*. No 90, Centraal Planbureau CPB, Den Haag.

this investigation. The key question is: what policies ensure that creative industries contribute maximally to a nation's wellbeing? Or to put it more concrete: what policies stimulate stronger economic development of creative industries?

In the quick scan we have opted for the most pragmatic approach: to consider mainstream economic policies that are also used for other sectors and other circumstances as well as a number of policies areas that are particularly relevant for creative industries. The comparative research considers seven categories of policies that are important for the economic development of creative industries. The first five categories are grouped around popular themes in contemporary economic policymaking, the sixth (intellectual property rights) is intrinsically linked to creative industries and the seventh is the miscellaneous category. In this comparative research we include policies that stimulate, aim at or regulate:

1. Innovation (Section 5)

Policies stimulating innovation are standard practice in economic policymaking in many developed countries. The base idea is that innovation drives economic development. Innovation policies are particularly popular for high-tech sectors. Stimulating innovation in creative industries is the first set of policies that we consider in the international comparison. It could concern policies that encourage innovation, directly or indirectly, through events, creation of platforms for knowledge sharing, knowledge transfer, networking, competitions, innovation funds, crossover among different sectors, etc.

2. Entrepreneurship (Section 6)

Policies aiming to stimulate entrepreneurship are part of mainstream economic policies. Research has confirmed that more entrepreneurship leads to higher economic growth and more innovation. Furthermore, there is a positive relation between economic growth and the number of start-ups. This set of policies brings together skills training (marketing, management, accounting, business planning guidelines, how to start your business, etc), information provision, networking, business start-up facilities, dedicated business support, etc., in order to get new or more successful creative entrepreneurs. Other educational policies will be taken into account if relevant, for instance when (national) educational institutions are used to stimulate new business development.

3. Access to venture capital (Section 7)

Another set of policies concerns the efforts to help creative entrepreneurs to get access to venture capital. Again this particular help to entrepreneurs is common practice in many countries. The philosophy is that is difficult to find investors for new and challenging ideas. This set of policies includes the efforts to match the entrepreneur who needs capital and the investor who looks for an investment opportunity. It is also concerned with particular government measures to make it more attractive for private investors to provide capital to entrepreneurs through fiscal stimuli. In the case of creative industries, it could involve dedicated venture capital funds for these industries, broker policies and intermediary structures to improve access to private venture capital by creative industries, etc.

4. (Inter)National market development (Section 8)

The fourth set of relevant policies deals with (inter)national market development. Government support for international market development is common practice in all developed countries. The idea is that the government can contribute to 'open doors' for companies or industries in developing their markets at home but especially abroad. For creative industries this set of policies could have to do with raising awareness of market potential, and with support to develop new markets (at home or abroad) through traditional export promotion, commissioning, trade missions, representatives abroad, networking, audience development, etc.

5. Creative clusters (Section 9)

Promoting the development of economic clusters has also become standard practice in economic policymaking. In this research clusters are localised networks of specialised organisations, whose production processes are closely bound up through the exchange of goods, services and/or knowledge. Many cluster policies are developed at the regional or local level, but also national authorities promote the development of clusters. This investigation comprises national policies to push the development of a creative cluster within a city or a region.

6. Intellectual property rights (Section 10)

Many would consider copyright and intellectual property rights policies as relevant for creative industries as creativity is at the heart of creative industries. In case of creative industries these policies do not only concern the laws and regulation itself, but also support for the applications for protection or other means to safeguard the creators' rights.

7. Other relevant policies (Section 11)

This category consists of policies that are relevant to the present project but do not fit in the adopted classification. It concerns tax exemptions and reductions for creative industries meeting certain criteria, special fiscal regimes and subsidies for objectives other than the ones mentioned under 1 to 6. It could also include competition policy[9] specifically designed and applied to creative industries. Finally, it could also look at policies promoting cultural tourism or attracting creative talent.

In this international comparative investigation we combine these seven categories of economic policies with the broad definition of creative industries – the three sectors and the two stages of the business column. The table in the annex summarises these aspects. We have included two more elements that are relevant for this international comparative study. Does the national government develop specific *or*

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[9] Competition policies are 'classical' antitrust policies preventing too much concentration of power in the market such as monopoly or oligopoly tendencies and it promotes competition.

generic policies for creative industries? Generic policies are policies directed to creative industries with no distinctions among the three different groups of creative industries. Specific policies are policies directed to only one and/or two groups of creative industries. A final question that is incorporated in the study: are the policies concerned direct interventions by national government or are the policies meant to stimulate local government to set up policies for creative industries?

4 General trends in policies

Before we analyse the various categories of relevant policies for creative industries, this section discusses some general trends in the development of these policies.

Increased awareness of the potential of creative industries

This explorative study in the selected countries has clearly demonstrated that the interest of national governments for the economic potential is on the wax. Many countries have commissioned studies into the economic impact of creative industries since the first Creative Industry Mapping Document published in the United Kingdom in 1998. Table 4.1 lists mapping document for some of the national governments in this research. These mapping studies have given an impulse to the national debate on the importance of creative industries and have led to the development of national policies for creative industries. The rapid growth of national policies for the creative industry since 2000 is clearly an indication of increased awareness at the national level. Furthermore, the attention has also increased in Portugal and Germany where such a national assessment has not yet been carried out. Portugal is currently reshaping its policies for cultural industries aiming to establish a stronger link with innovation and the economy. In Germany's parliament creative industries are higher on the agenda and many parties support the idea for a mapping document of Germany's creative industries (presumably called *Deutschen Kreativwirtschaftsbericht*).

Table 4.1 Documents mapping or exploring (the impact of) creative industries

United Kingdom	Department for Culture, Media and Sport: *Creative Industries. Mapping Document*	1998
Denmark	The Ministry of Trade and Industry and The Ministry of Culture: *Denmark's Creative Potential - Culture and Business Policy Report*	2000
United Kingdom	Department for Culture, Media and Sport: *Creative Industries. Mapping Document*	2001
Germany - North Rhine-Westphalia	Ministry of Economic Affairs and Energy of the State of North Rhine-Westphalia: *4th Culture Industries Report*	2002
Australia	Australian Government Department of Communications, Information Technology and the Arts and the National Office for the Information Economy: *The Creative Industries Cluster Study*	2002-2003
New Zealand	New Zealand Institute of Economic Research: *Creative industries in New Zealand: Economic contribution*	2002
Spain - Catalonia	Catalan Institute of Cultural Industries: *Handbook on the Cultural Industries of Catalonia*	2002

Table 4.1 Documents mapping or exploring (the impact of) creative industries (continued)

Austria	Mandl, I. *et al.* for Federal Chancellery, Federal Ministry of Economics and Labour of the Republic of Austria, Austrian Federal Economic Chamber: *First Austrian Report on Creative Industries (Erster Österreichischer Kreativwirtschaftsbericht*)	2003
Singapore	Ministry of Trade & Industry: E*conomic contributions of Singapore's Creative Industries*	2003
Austria – City of Vienna	Ratzenböck, V. *et al*. for City of Vienna (MA 27)/Chamber of Commerce Vienna/Filmfonds Wien: *Untersuchung des ökonomischen Potenzials der Creative Industries in Wien (Survey of the economic potential of Creative Industries in Vienna)*	2004
The Netherlands	Dutch Ministry of Economic Affairs and the Ministry of Education, Culture and Science: *Culture & Economy: Our Creative potential*	2005
Austria	Mandl, I. *et al.* for Federal Chancellery, Federal Ministry of Economics and Labour of the Republic of Austria, Austrian Federal Economic Chamber: *Second Austrian Report on Creative Industries (Zweiter Österreichischer Kreativwirtschaftsbericht*)	2006
Belgium - Flanders	Flanders District of Creativity: *Creatieve Industrie in Vlaanderen*	2006

Promoting creative industries: economic policy or cultural policy?

A key question is: are creative industries primarily the subject of economic or cultural policy? The term industries suggest that it is economic policy. The explorative study shows that national governments consider it to be both. The most interesting policies combine cultural objectives (diversity, quality and distribution) and economic objectives (innovation, entrepreneurship, export, investment, clustering and economic growth). There is growing support for the idea that culture and creativity contribute to economic development directly and indirectly. Having said that, the policy schemes included in the research indicate that the majority of policies stimulating the economic development of creative industries originate from, and are funded by, the cultural sectors. Table 4.2 indicates whether the majority of policies in the first five categories of policies involve economic policymakers and economic funding *or* cultural policymakers and cultural funds. The table should be read with caution as it is very difficult to aggregate the complex realities of policy schemes. Nevertheless, the awareness of the economic potential has increased but it has not resulted in an appropriate balance between mainstream economic policy and cultural policy.

Table 4.2 Creative Industries: Economic Policy or Cultural Policy?

	Economic agents and funding	**Cultural agents and funding**
Innovation	<50%	>50%
Entrepreneurship	<50%	>50%
Access to venture capital	>50%	<50%
Market development	<50%	>50%
Creative clusters	>50%	<50%

What type of policies for creative industries?

In practice there are four types of policies for creative industries. The first type concerns generic economic policies without any adaptation for creative industries. Creative industries are treated as any other economic sector. The second type comprises generic economic policies that consider the specific circumstances of creative industries. The third type is about specifically designed policies for the broad spectrum of creative industries. The fourth type involves specific policies for sub-sectors of the creative industries.

The central part of the quick scan has been about the second, third and fourth type of policies. The quick scan point outs that creative industries are not excluded from generic economic policies. However, in many of the type two, three and four policies, the argument for adapting existing or setting up new policies is that creative industries experience difficulties to meet the criteria to qualify for support from these generic policies. Most of the countries in the research have special strategies for sub-sectors of the creative industries (such as design, audiovisual, media and gaming).

Comprehensive national strategy for creative industries: an emerging trend?

The majority of countries in the investigation do not have a comprehensive long-term national strategy for creative industries. Nonetheless, the number of countries with an integrated national strategy for creative industries is growing (Austria, Finland, Singapore, United Kingdom are good examples of such countries). Also, other countries have set up experimental programmes for creative industries (such as The Netherlands).

As mentioned above most countries have strategies for sub-sectors of creative industries. One might come to the conclusion that these sub-sector strategies might clash with a broad strategy for creative industries. The quick scan does not support that conclusion. To the contrary, a national strategic framework for creative industries with complementary specialist programmes for its sub-sectors might lead to synergy.

Delivering policies for creative industries

Increasingly the delivery of policies for creative industries and policies aiming to stimulate sub-sectors are put in the hand of arm's length organisations. These organisations are funded from various (mostly) public sources and are responsible for one or several categories of policies (innovation, entrepreneurship, market development). For instance, stimulating innovation is a key challenge for the National Endowment for Science, Technology and the Arts (NESTA) in the Untied Kingdom. NESTA has a dedicated programme for creative entrepreneurs. Table 4.3 highlights some examples of arm's length organisations that have specific attention for creative industries. One explanation could be that some distance from the Ministries and other stakeholders involved could stimulate partnerships and promote policies that stimulate both economic and cultural objectives. It is important to stress that despite the distance most of these arm's length bodies give account for their activities to the Ministries involved. Another trend is that special workgroups with representatives of Ministries and other public stakeholders supervise the national strategy. This trend could be related to the before mentioned trend as these workgroups can oversee the activities of the arm's length organisations, but these workgroups could also coordinate the activities of individual Ministries. For example, the Ministry of Trade & Industry and the Ministry of Culture have placed the management of Finland's cultural export programme in the hands of a special working group.

Table 4.3: Examples of arm's length organisations catering explicitly for creative industries

Austria	Arbeitsgemeinschaft creativ wirtschaft austria (creative economy Austria)[10]
	Austria Wirtschaftsservice GmbH
Austria – City of Vienna	Departure
Canada – Quebec - Montreal	SODEC (Société de Développement des Entreprises Culturelles)
Belgium – Flanders	Flanders District of Creativity
	ParticipatieMaatschappij Vlaanderen (Investment Agency Flanders)
New Zealand	New Zealand Trade and Enterprise
Singapore	Creative Community Singapore
Spain - Catalonia	Catalan Institute of Cultural Industries (Institut Català de les Indústries Culturals- ICIC)
Sweden	Swedish Trade Council
	The Swedish Knowledge Foundation

[10] It is an initiative of the Wirtschaftskammer Österreich (Chamber of Commerce Austria)

Table 4.3: Examples of arm's length organisations catering explicitly for creative industries (continued)

United Kingdom	The Creative Exports Group
	Arts & Business
	British Council - Creative Economy Unit
	National Endowment for Science, Technology and the Arts

What is the role of national governments vis-à-vis lower levels of government?

What is the role of national governments in the policies for creative industries? What should be done locally and what nationally? There is no unambiguous answer to this question. It depends very much on the type of policies. The national level is leading for international market development, venture capital schemes and copyright policies (in relation to supranational policies). Local and regional governments are leading in creative cluster policies and entrepreneurship. The general picture for innovation policies is more mixed as all levels of government are involved. Nevertheless, national governments are in charge of the most important innovation policy schemes.

Do nations have priorities in the creative industries business column?

An explicit strategy for creative industries also raises the issue of priorities. In some cases, economic policies focus more on creation whereas other countries prioritise distribution. Most countries though have explicit policies for creation and production on the one hand and for distribution on the other. Generally speaking, the latter is better integrated in standard economic policies than the first.

What are the most popular economic policies for creative industries?

In the selected countries, innovation, entrepreneurship and market development are the most popular economic policies for creative industries. Venture capital is becoming more important but is not in the same league. We have found interesting examples of creative cluster policies but most of the creative cluster initiatives come from local government. Amendments and new Intellectual Property Acts are being made to face the challenges of the digital society and find a good balance between setting the right incentives for creation and diffusion of protected works.

5 Innovation

One of the largest and broadest policy areas in this investigation concerns innovation policies. Several different and interactive trends emerged within innovation policy.

Improving R&D

First of all, innovation for the creative industry has to do with technological innovation (e.g. new media) as well as non-technological innovation (e.g. design and creative partnerships). Especially the latter is particularly important for the creative industries. In general, cultural policies can be considered part of the innovation policies for creative industries: culture as the research laboratory for creative industries (e.g. funds to stimulate the forerunners in creative industries, for example in the independent film industry). Research and Development, both technology-driven and non-technology driven, is a key strategy to develop a strong creative sector and develop innovative projects. R&D schemes and funds are being set up to encourage specific creative disciplines that are critical to the national cultural development, or to foster projects in the borderline between cultural and business sectors, or to make a better use of promising technology.

Table 5.1: R&D supporting schemes

Canada	New Media Research Networks Fund (by Canadian Culture Online)	New media
Singapore	Arts R&D Funding Scheme (by National Arts Council)	Arts
South Korea	Support Program for New Researchers / Undesignated Assignment Support Program / Support Program for the Publication of Excellent Film Books / Support Program for Excellent Theses (by Korean Film Council - KOFIC)	Film

The power of design

Numerous countries have developed national design programmes. Innovation policies in this field aim at fostering the design industry and promoting good design through support, awards and competitions. Design is recognised as a key factor in international competition and technological success.

Table 5.2: An overview of awards and support to design

Belgium - Flanders	Talentscoutin (Talent Scouting) (by Design Flanders)
Finland	Innovation Support for Design (by National Council for Design) / Kaj Franck Design Prize / Fennia Prize (earlier Pro Finnish Design prize) / Young Designer of the Year Prize / Estlander Prize (by Design Forum Finland)
The Netherlands	Premsala foundation -design platform (funded by Ministry of Education, Culture and Science and the City of Amsterdam)
Norway	Award for Design Excellence / Honours Award for Design Excellence / Classic Award for Design Excellence / Young Talent Award / International Design Award / The Design Book (by Norwegian Design Council)
Singapore	President's Design Award / Light Touch Design Competition / Inter-Design Development Scheme (by Design Singapore Council)
Sweden	Swedish Design Award (by the Advertising Association of Sweden, The Swedish Industrial Design Foundation-SVID and Svensk Form-The Swedish Society for Crafts and Design) / National Design programme 2006-2010 (by SVID) / The Association of Swedish Engineering Industries' Grand Design Award (by SVID and Svensk Form)

Design is also seen as a strategic tool that helps companies to be more competitive. Several institutions and policies have been developed to provide a better understanding, knowledge and use of design as a tool for innovation. "An important objective behind the Norwegian Design Council's Award for Design Excellence is to inspire companies and designers to work with strategic design". One of the aims of Design Singapore is to integrate design in companies as strategic tool to drive innovation and growth (see also Section 8 on Market development policies). A similar initiative is developed by the Danish Design Centre: Design + Business = Better Business. Finally, Design 2005! (Finland) will serve as final example of a comprehensive and integral approach to design. The promotion of design is also part of the *Cultural Exports Promotion Programme 2007-2011* developed by the Finnish Ministry of Education, the Ministry for Foreign Affairs and the Ministry of Trade and Industry (see Section 8 on Market development policies).

Box 5.1: Design + Business = Better Business – Denmark

The Danish Government launched a new design strategy in 2003 in close cooperation with the business sector, designers and the design education programmes in order to ensure the competitiveness of Danish design. The National Agency for Enterprise and Construction is involved in the business policy aspects of Danish design, while the Ministry of Culture is responsible for the development of design in terms of research and education. The areas of action within the design policy are related to branding Danish design nationally and internationally, trade development, and facilitating the use of design by the corporate sector.

The Danish Design Centre (DDC) is an independent body under the Ministry of Economic and Business Affairs, whose priorities are to facilitate the use of design in the Danish business, to promote Danish design establishing it as a worldwide brand and to increase the public interest for design. The DDC was established in close cooperation between the private and the public sectors. The DDC functions as Denmark's national knowledge centre with respect to design. Seminars, workshops, network meetings and campaigns, especially focusing on the usage advantages of design, are sought in order to build up permanent co-operation within the Danish business world. Moreover, taking into account that SMEs constitute the majority of the Danish companies, the DDC puts forward special efforts for these enterprises which are seen as the potentials to implement design in their business operations.

In 2006 the DDC launched the promotion programme Design + Business = Better Business. The aim is to improve the ability of Danish companies to work with design and helping them to become more competitive in the international design trade.

Source: Danish Design Centre website (www.ddc.dk/DESIGNVIDEN/)

Box 5.2: Design 2005! – Finland

Finland's national design policy resolution Design 2005! was adopted in 2000 to raise the competitiveness of Finnish products and services through innovative use of design by 2005, the Finnish Design Year. The policy was implemented by the Finnish government and followed up by several councils and bodies. The main aim of Design! 2005 programme was to integrate design as part of the national innovation system and its renewal.

In line with Design 2005! the Finnish National Technology Agency (Tekes) launched a large scale Design 2005 Industrial Design Technology Programme (2002-2005) in order to raise the standard of design research and make use of design expertise in corporate product development and business strategy, and to develop the services provided by design firms. The programme aims to increase co-operation among corporations, designers, universities and research centres.

The Academy of Finland participated in the Industrial Design Technology Programme with its interdisciplinary programme Industrial Design Research programme (2003-2006). The thematic areas of the programme range from the usability of technology and research related to the information environment, to cultural research and the artistic aspect of industrial design, to research into the use, methods, benefits and systems of industrial design, new manufacturing technologies and sustainable development in design.

Sources: Design Forum Finland website (www.designforum.fi); Finnish Design website (www.finnishdesign.fi); Tekes website (www.tekes.fi); Design Forum Finland, Finnish Design Year 2005, Final report: brief in English, 2006 (the document can be downloaded at www.finnishdesign.fi/files/fide/loppuraportti/DesignYear2005_briefinEnglish.pdf)

New media, digitalisation and development of digital content strategies

The economic potential of creative industries can be strongly enhanced by the new technological development and by the new media. Several specific policies, awards, funds and competitions have been developed to stimulate new media arts and new works with the use of the new technologies.

Table 5.3: New media supporting schemes

Austria	Net Culture Support Scheme (by City of Vienna)	Net culture
Canada	New Media Fund (by Téléfilm Canada)	New Media
Canada - Ontario	Ontario Interactive Digital Media Tax Credit - OIDMTC / Ontario Computer Animation And Special Effects Tax Credit - OCASE (by Ontario Media Development Corporation–OMDC and the Ministry of Finance)	Digital media
Denmark	Subsidy schemes for artistic multimedia (by Ministry of Culture)	Multimedia
France	Fonds d'aide à l'édition multimédia - FAEM (Support Fund for Multimedia Publishing) (by Ministry of Industry and Ministry of Culture and Communication) / Reseau Recherche et Innovation en Audiovisuel et Multimedia - RIAM (Network for Research and Innovation in Audiovisual and Multimedia) (by Ministry of Industry, Ministry of Culture, Ministry of Education and Research) / DIspositif pour la CRéAtion Artistique Multimédia - DICRéAM (Programme for Artistic Multimedia Creation) (by Ministry of Culture and Communication)	Multimedia
Portugal	Financial Support for the Development of Multimedia Projects / Financial Support for the Production of Multimedia Cultural Content Works / Financial Support for the Transcription to DVD format of cultural content existing works / Ver Programme (by Institute for Cinema, Audiovisual and Multimedia - ICAM)	Film, audiovisual, multimedia
New Zealand	Headstrong Digital Scheme / Feature Film Post-Production Guidelines (by New Zealand Film Commission)	Digital film
Singapore	New Media Arts Fund (by National Arts Council) / Synthesis Online Content Initiative (by Media Development Authority - MDA)	New Media
South Korea	Digital Cinema Project (by Korean Film Council - KOFIC)	Digital film

National policies are fostering the digitalisation of the cultural heritage available in archives, libraries, museums and other cultural institutions in order to improve its preservation and to raise opportunities for research and education as well as collaborative learning (e.g. Digital Library in Norway, Library 2010 Report in Singapore). In The Netherlands six institutions[11] created a consortium called *Beelden voor de toekomst* (Images for the future) which drew up a plan in order to preserve the Dutch audiovisual heritage. The grant for the project was given in September 2006 by the FES (Fonds Economische Structuurversterking), a fund aimed at reinforcing the economic structure of The Netherlands. The digital content industry is seen as a new growth engine. Digital content strategies are developed worldwide to induce investment and strengthen the development of digital cultural content production for new media (e.g. Australia Digital Content Strategy, Digital Content Industry Action Agenda, Investment Scoping Forum; Ireland Strategy for the Digital Content Industry, Digital content steering group; New Zealand Digital Strategy, National Content Strategy; South Korea Contents Production and Technology Development Service and Digital Contents Industry Promotion Policies; UK Digital Strategy, Creative Industries Taskforce, Digital Content Forum).

Game industry

The game industry is taking a growing share of the media sector, playing an increasingly important role in content creation. Specific policies have been developed to make the game industry more competitive and economically important for the export industry, such as establishing co-operative networks for the distribution of games abroad and awards to encourage creativity and innovation (see Table 5.4). The programmes developed by the Korea Game Industry Agency (KOGIA) and by the Finnish national centre of game business, research and education *Neogames*, and the recently approved French tax credit for game will serve as examples.

Box 5.3: Several programs by Korea Game Industry Agency (KOGIA) - South Korea

In 1999 the National Government founded KOGIA to develop the already competitive game industry into a strategic cultural product of South Korea in the global market, addressing the relations with other cultural industries such as the film industry. KOGIA sets out to position the game industry as the export-leading industry in South Korea and assure its competitiveness in the global market. KOGIA's main goal is to make South Korea one of the top-3 global gaming nations. Programs and activities related to innovation, market development and entrepreneurship can be found among the seven core plans of KOGIA: 1) Public awareness; 2) Promotion of e-sports; 3) Strengthening the competence of game contents creation; 4) International collaboration and export promotion; 5) Intensification of industry's basic infrastructure; 6) Cultivation of essential key professionals; 7) Law and policy improvement and executive innovation.

Regarding innovation, KOGIA encourages game content creation by organising contests such as 'Best Games of the Month' and 'Korea Game Grand Awards', and contests for content planning of video games

[11] The preservation and digitisation of parts of the collections of the *Filmmuseum*, the *Nationaal Instituut Beeld en Geluid* and the *Nationaal Archief* will result in a pool of high-quality and publicly available audio-visual content. The *Centrale Discotheek Rotterdam* and the *Vereniging Openbaar Bibliotheekwerk* (public libraries) add their distributional qualities and the *Stichting Nederland Kennisland* its copyright know-how and developmental power, so that this content can be made accessible and ready-to-use.

and next-generation portable games. A teenage gaming culture festival is also organised to encourage public awareness of gaming culture.

In order to reach the intensification of the industry's basic infrastructure, KOGIA supports small and medium game businesses and strengthens the services of integration between institutions. KOGIA supports the promotion and exchange in the regional game industry, holding exchanges between CEOs and developers from different regions. KOGIA operates a Game Research Center and works for strengthening the collaboration between the industry and the universities.

KOGIA's activities also aim to encourage executive innovation through customer satisfaction. The main idea is to intensify education for improving organisational competence, provide social service programs for customer oriented management, to operate product oriented personnel management system and to conduct evaluation on business administration. It also works for developing a value assessment model for game companies and contents, for providing administrative support and for establishing a plan to support adolescent platforms.

KOGIA developed a strong export promotion plan: 1) Building a comprehensive game exporting support system and strengthen overseas PR; 2) Expanding a global marketing network; 3) Hosting an investment and export conference for opening new markets; 4) Encouraging the participation of domestic game companies in international expositions; 5) Establishing a Korean game PR pavilion in international expositions; 6) Strengthening the global competence of domestic arcade games and mobile games.

Source: KOGIA website www.(kogia.or.kr)

Box 5.4: Neogames – Finland

The Finnish game industry is growing rapidly. Its positive development of the game industry in Finland is the result of continuous investment in the sector. The Finnish National Technology Agency (Tekes) has supported the game industry with generous investments since 2000. The promotion of games is also part of the Cultural Exports Promotion Programme 2007-2011 developed by the Finnish Ministry of Education, the Ministry for Foreign Affairs and the Ministry of Trade and Industry (see Section 8 on market development policies).

Neogames is a national game centre which operates within the Technology Centre Hermia Ltd in Tampere responsible for the coordination and implementation of the Tampere Region Centre of Expertise Programme (see Section 9 on creative clusters policies).

Nearly all the members of Finnish gaming community are members of Neogames. Neogames gathers around itself games companies connected to computer and mobile gaming, research institutes and organisations from a one-man company to global players, from research to business.

Neogames' activities are:

- the creation of a comprehensive network of players in the games field
- the development of games-related business
- the support and coordination of research and training related activities to support the games field
- the improvement of the image of the games field and making the field better known (transferring games-related news from the culture section to the financial pages).

Source: Neogames website (www.neogames.fi/fingames/index.htm)

Box 5.5: Crédit d'impôt jeu vidéo (tax credit for videogames) – France

As part of its supporting framework to the competitiveness of the game industry, France has recently approved a tax credit for the creation of games (crédit d'impôt jeu vidéo) . The plan provides tax credits of up to 20 per cent of production costs (maximum €3 million) in recognition of the 'cultural dimension' of games (e.g. involvement of artist talent: writers, directors, graphic artists, musical and sound creators). Cultural criteria will play a central role in the selection of the games eligible for the tax credit. Game companies entitled for the tax credit should prove production and development costs equal or superior to €150,000, at least 50 per cent of which should be represented by artistic costs. However, the European Commission has launched a formal investigation to verify if the tax credit might constitute a subsidy, potentially in violation of EU policy.

Source: Leigifrance website (www.legifrance.gouv.fr)

Creation and fostering of networking, creative partnerships and collaborative strategies

Policies and schemes to co-fund innovative partnerships among different sectors and actors, and among different disciplines, thus promoting cross-over (e.g. art and science; art, business and technology), have been set up as a way to affect and stimulate innovation. Such schemes would help to reduce some of the barriers preventing the formation of strategic partnerships between the cultural and business sectors.

NESTA Connect is one of the best examples of this approach aiming at supporting collaborations between different disciplines, organisations and places. The programme explores how collaborative practises would affect and stimulate innovation. A similar fund has been recently developed in Ontario, Canada. In September 2006 the Ministry of Culture in Ontario, Canada launched the *Entertainment and Creative Cluster Partnerships Fund* (the Partnerships Fund) co-administered by the Ontario Media Development Corporation. The three-year fund aims to foster long-term growth of the creative and entertainment industries in Ontario, encouraging collaboration and lasting partnerships among companies and educational and research institutions, the public sector and other business groups aimed at increasing innovation and alertness in the creative cluster, especially in response to major shifts in technologies for creation, distribution and delivery.

In order to improve the links between culture and economy in the Netherlands, the Ministry of Economic Affairs in co-operation with the Ministry of Education, Culture and Science launched the *Creative Challenge Call* in 2006 with a budget of €3 million. Both the Netherlands Foreign Trade Agency and the Nederland Kennisland Foundation (an independent Dutch think tank) are in charge of the project. The idea behind the tender is that the capacity of the Dutch business community to innovate can be boosted if the links between creative industries, other sectors of the Dutch business community and knowledge institutes are made stronger. The focus of the projects is on forming networks, knowledge transfer and collaboration, international significance and sustainability. The projects selected have to be finished at the end of 2007.

Box 5.6: NESTA Connect - United Kingdom

The National Endowment for Science, Technology and Arts (NESTA) is committed to support innovation, talent and creativity. It was launched publicly in 1999. Its mission is to increase the innovation capacity of the whole UK economy. NESTA considers innovation as a key driving force for economic and social development, able to improve the quality of people's life, to generate new products, services, industries and markets which in turn generate new employment opportunities. NESTA helps early-stage companies to build-up skills and knowledge by informing them about innovation policies and by investing in them directly (NESTA Ventures) or indirectly as a limited partner or co-investor (NESTA Capital). In addition, NESTA is involved in developing regional and national policies that support innovation.

NESTA has launched numerous programmes that support early-stage and innovative companies. One of them is the NESTA Connect initiative. The objectives of NESTA Connect are set out as:

- to examine different models of collaboration and the extent to which they support new innovation
- to explore variables involved in collaborative innovation, and identify correlations between them and successful innovation
- to showcase successful models of collaborative innovation and assess their potential for scaling and replication
- to inspire and influence more successful and widespread collaborative innovation throughout the public, social, and private sectors.

The core activity is based on stimulating collaboration for innovation among the UK innovators. NESTA develops a series of practical projects using three types of collaboration:

- Cross-organisational collaboration: value or supply chain innovation between different types of organisation. For example, linking corporate, suppliers, universities and consumers, and exploring 'open innovation' and 'user-led innovation', such as the BBC Innovation Labs.
- Interdisciplinary collaboration: bringing together researchers from different disciplines to review and solve specific problems. For example, through the Crucible Programme for post-doctoral researchers.
- Distance-spanning collaboration: to find out if collaboration (on and offline) is influenced by the place where people live. In particular, NESTA wants to explore the impact of the emerging social networking culture, enabled by the web, on the future of work, education, arts, media and entrepreneurship. For example, Uploading...Innovation.

Source: NESTA website (www.nesta.org.uk)

As a more comprehensive and integral approach to the whole experience economy, the Swedish Knowledge Foundation developed in 2006 the *FUNK* growth model in order to foster the experience industry in Sweden and stimulate cross-over among disciplines and sectors.

Box 5.7: FUNK: A Growth Model for the Experience Industry – Sweden

FUNK is growth model developed by the Swedish Knowledge Foundation in 2006 in order to foster the experience industry in Sweden. The Swedish Knowledge Foundation, whose board members are appointed by the Swedish government, was created in 1994 in order to increase Swedish competitiveness. Its primary functions are thresholds: the organisation of creative forums, the development of new forms of collaboration and the improvement of cooperation among higher education and business sectors.

The term 'experience industry' defines the Swedish approach towards the new economy. It expresses more than the creative and cultural industries. Experiences are sought as the important added values. In the words of the Swedish Trade Council "Design, music and games are for example added value to Sony Ericsson's mobile". The Knowledge Foundation has determined 13 areas within the Experience Industry: Architecture, Art, Computer games, Design, Fashion, Film/Photo, Food & Drink, Literature/Publishing, Market Communication, Media, Music, Performing Arts and Tourism.

The FUNK model highlights how the experience economy is surpassing from conventional sectoral boundaries towards a cross-sectoral and integral approach. The word FUNK represents the key inter-complementary fields where measures are needed to foster the experience economy. The acronym FUNK stands for the Swedish words forskning (research), utbildning (education), näring (enterprise) and kultur (culture). 'Culture' in the FUNK model generally represents the non-commercial part of the creative industries activities. The whole vision of the model is to achieve improvements in society through a long-term approach and more sustainable use of the resources.

Sources: Swedish Trade Council website (www.swedishtrade.com/experienceindustry); Knowledge Foundation, FUNK: A Growth Model for the Experience Industry, 2006 (the document can be downloaded at www.kks.se/upload/publikationsfiler/funk-summary-2006-publ.pdf)

Specific funding, grants, awards and support

Several policies are specifically directed to architecture, arts, cinema, design, game industry, music and theatre respectively in order to foster innovation in these sub-sectors. In general, the most developed innovation policies regards film and design. The *A•UDE Promotion Programme* launched by the Singaporean national land use planning authority to promote innovative activities in architecture and urban design, and the policies of the Australian Film Commission will serve as example. In addition the *iP ImpulsProgramm creativwirtschaft Austria* will be presented as an example of a fruitful collaboration between the Austrian National Bank and the Austrian Chamber of Commerce in order to foster innovation and economic viability of SMEs in the fields of music, multimedia and design.

Table 5.4: An overview of specific funding, grants, awards and support per sub-sectors

Architecture	Building for Life / Europan UK (by Commission for Architecture and the Built Environment - CABE)	UK
	The A•UDE Promotion Programme (by Urban Redevelopment Authority and Design Singapore Council)	Singapore
Arts	Visual Art support / New Technology support (by Arts Council Norway)	Norway
	Young people & the arts fellowships / Emerging Curators Program (by ArtsWA)	Australia - Western Australia
	Cultural Medallion Grant / Young Artist Award / Emerging Artists Fund (by National Arts Council)	Singapore

Table 5.4: An overview of specific funding, grants, awards and support per sub-sectors (continued)

Film	Several programs developed by the Australian Film Commission	Australia
	Screen Innovation Production Fund (by New Zealand Film Commission and Creative New Zealand)	New Zealand
	National Scriptwriting Competition (by Media Development Authority - MDA)	Singapore
	Independent Film Production Support Program (by Korean Film Council - KOFIC)	South Korea
	Rookie film fund (by the Swedish Film Institute, with Swedish pub caster SVT and so far two regional film centres, Film i Väst and Filmpool Nord)	Sweden
	New Cinema Fund (by UK Film Council)	UK
Game	The Great Canadian Video Game Competition (by Téléfilm Canada)	Canada
	Neogames' activities (by the National Technology Agency - Tekes)	Finland
	Crédit d'impôt jeu vidéo (tax credit for videogames) (by French Government)	France
	Mobile Game Development Initiatives (by Media Development Authority - MDA)	Singapore
	Best Games of the Month / Korea Game Grand Awards (by Korea Game Industry Agency - KOGIA)	South Korea
	Dare to be digital (by University of Abertay Dundee and National Endowment of Science, Technology and the Arts - NESTA)	UK
Music	New Musical Works Program (by Canada Music Fund)	Canada
	Subsidies to organise Music Competitions (by National Council for Music)	Finland
Theatre	Support to Experimental Theatre Projects (by National Council for Theatre)	Finland
	Fonds Experimentelles Musiktheater (Experimental Music Theatre Fund) / Theaterzwang (Theatre is thrilling) Performance Network (by NRW KULTURsekretariat)	Germany - North Rhine Westphalia

Box 5.8: A•UDE Promotion Programme – Singapore

The A•UDE Promotion Programme stands for 'Architecture and Urban Design Excellence Programme'. It was launched in 2005 by the Urban Redevelopment Authority (URA), the Singaporean national land use planning authority. The main goal is to support individuals and organisations carrying out innovative activities in architecture and urban design. The programme provides funding up to 50 per cent of the expenditure of activities under specific themes: Live-in-City, City for the People, Identity and Place Making. Events, publications, multi-media productions, research studies and design competitions have being set out. S$3 million have been allocated for the programme over the next three years.

Sources: A•UDE websites (www.ura.gov.sg/aude/ and www.ura.gov.sg)

Box 5.9: Several programs developed by the Australian Film Commission (AFC) – Australia

The Australian Film Commission (AFC) is a Government agency funded in 1975 to ensure the creation, distribution and preservation of Australian audiovisual content (film, television and interactive media). It is funded on one hand by the national government and on the other hand by the return on investments it does in film production. AFC also gets funds from the interest income it receives on film development loans. The agency assists audiovisual content production and also produces its own works. The AFC funding programs offer support to projects and people with the aim to assist the career development of writers, directors and producers. Even though AFC has funding programs supporting activities related to national/international market development and improvement of education, training and entrepreneurial skills, the main aim of the majority of its programmes is encouraging innovation.

The AFC funds project development (script development for feature films, short features, documentaries, animations and digital media projects) with the objective to ensure that projects achieve their potential and are as strong as possible when competing for production finance.

The AFC also gives funding for professional development through investment in the creation of low-budget feature films, short features, short dramas, short TV drama series, documentary, animation and interactive digital media projects. The aim of this programme is to assist talented filmmakers.

The AFC has a special initiative named IndiVision which is developed as a strategic response to declining levels of film and television production in Australia. It includes several programs: IndiVision Project Lab combines workshops on script development, performance work and visual language, production strategies and marketing for low-budget feature film development; IndiVision Script Development Program identifies projects at outline stage on the strength of the story idea and its ability to stand out in the marketplace; IndiVision Production Program is designed to provide investment to low-budget features; IndiVision Screenings showcase outstanding independent low-budget features from around the world with the objective to inspire Australian filmmakers and audiences.

Another interesting initiative is 'jtv docs' which targets emerging filmmakers aged 35 years and under. The programme funds four half-hour and/or one-hour documentaries to explore music, ideas, culture and contemporary issues, to screen them on ABC main channel, ABC2 and ABC Online, and to incorporate podcasts and mobile phone SMS technology.

Lastly, AFC also funds the development of interactive digital media projects. These projects have to be activities that contribute to a further understanding of interactive and broadband content for interactive television applications and online exhibition and distribution.

Examples of successful films 2005-2006: the feature film Ten Canoes which received AFC General Development Investment funding, bridging and marketing loans won the Special Jury Prize at the Un Certain Regard section of the Cannes Film Festival; the short animation The Mysterious Geographic

Explorations of Jasper Morello which received AFC development and production funding was nominated for Best Short Animation Film at the BAFTA and Academy Awards.

Sources: AFC website (www.afc.gov.au); AFC Annual Report 2005-2006 (the document can be downloaded at www.afc.gov.au/downloads/pubs/annualreport0506.pdf)

Box 5.10: iP ImpulsProgramm creativwirtschaft Austria – Austria

The iP ImpulsProgramm was initiated by the Austria Wirtschaftsservice GmbH (AWS) - the Austrian National Bank specialised in the economic support of companies, in particular start ups. Thanks to the collaboration with the arge creativ wirtschaft Austria - the competence centre for the creative economy set up by the Austrian Chamber of Commerce - the new programme iP ImpulsProgramm creativwirtschaft Austria was launched in November 2004.

The programme provides funding for innovative projects in music, multimedia and design, with the overall objective to support the numerous Austrian creative SMEs. Thanks to the fruitful collaboration between the Austrian National Bank and the arge creativ wirtschaft Austria, the programme can today make use of several services offered by the Chamber of Commerce (e.g. educational measures, networking, export services, etc). The main instruments the programme uses to boost the creative industries are educational measures (raising management competence), public awareness activities and financial grants for innovative projects in the music, multimedia and design industries.

The programme is funded for a period of three years by the Austria Wirtschaftsservice GmbH, the arge creativ wirtschaft Austria and the National Endowment for Research, Technology and Development. The allocation of the budget takes place through a yearly call, inviting potential entrepreneurs and SMEs to submit their business plans. Preference is given to projects that have not been established yet due to a lack of financial means, but have the potential to become economically viable. Thus, the focus is clearly on innovative projects with a commercial orientation. The subsidy may amount to a maximum of 70 per cent of the project costs; on average subsidies of 50 per cent of the project costs have been granted. During the first Call (finished in 2005) the jury (consisting of a number of international experts) decided to subsidise 24 projects, the total subsidy being €2.7 million.

Sources: Austria Wirtschaftsservice GmbH – AWS website (www.awsg.at); iP Impulsprogramm website (www.impulsprogramm.at); Stiftung FTE website (www.stiftung-fte.at); KMU-Forschung Austria /Institut für Kulturmanagement (IKM): Zweiter Österreichischer Kreativwirtschaftsbericht (Second Austrian Creative Industrie Report). Vienna: Creativwirtschaft Austria, 2006 (the document can be downloaded at www.creativwirtschaft.at/download.php?folder=news&file=zweiterKW_Bericht.pdf;
The English summary can be downloaded at www.creativwirtschaft.at

Most of the selected countries and regions have developed special policies promoting innovation in creative industries. R&D, both technological and non-technological, has emerged as a key strategy to develop a strong creative sector and develop innovative projects. The cases of the game and design industries are exemplificative of both kinds of innovation. Many national governments are developing policies and schemes to create and foster networking, creative partnerships and collaborative strategies among different sectors and actors, and among different disciplines as a way to affect and stimulate innovation. The majority of the initiatives in this policy area are mainly directed to the creation/production phase, and to specific creative industries sub-sectors.

6 Entrepreneurship

Promoting entrepreneurship for creative industries is a popular theme among policymakers and in most of the selected countries and regions. Generally speaking there are two approaches for stimulating entrepreneurship for creative industries: one is to include creative industries in mainstream economic policies promoting entrepreneurship, the other concerns tailor-made policy schemes for entrepreneurship in creative industries.

Include creative industries in mainstream economic policies

The first approach is to explicitly incorporate creative industries in mainstream economic policies promoting entrepreneurship. The *Go! Programme* in North Rhine-Westphalia (NRW) is an example of such a general programme in which creative industries are seen as one of seven special target groups, with a special arrangement. Typically, Ministries (or arm's length organisations) responsible for economic development administer these policies.

Box 6.1: Go! Das Gründungsnetzwerk (Go! Business Start-up Networks) – North Rhine Westphalia (Germany)

The aims of the Go! Programme are to increase the number of business start-ups, to strengthen the development of existing businesses and to promote a new culture of being self-employed.

Go! offers the following services:

- Providing information on how to start up a business, what organisations are there to help you, relevant government support programmes, etc.
- Initial advice: reviewing people's plans for starting a business and gives more detailed information
- Handling Formalities: giving support regarding registration, permits, etc.
- Helping to get venture capital through Business Angels
- Free of charge coaching: giving personal advices for people that have just started or are going to start a business
- Special events and seminars.

Go! is a cooperative initiative of all partners in NRW promoting business start-ups. It has been created in 1995 and it involves partners such as the State government, Chambers of Industry and Commerce, Chambers of Handicrafts, municipal authorities and economic development agencies, banks and savings institutions, employment offices, professional associations, unions, schools, universities and technology centres, senior coaches and Business Angels.

The Go! Project has seven categories of business, and one of them concerns creative business entrepreneurs. There is a special support programme for creative business entrepreneurs, especially those in the design business. It also includes literature, performing arts, media and film. For the creative industries special cultural start-up centres (Kulturelle Gründerzentren) give advise for improving people's qualifications when starting a business, they help finding grants, they encourage partnerships between entrepreneurs and regular business partners, and they support the development of new marketing strategies for creative entrepreneurs.

Sources: Ministerium fur Wirtschaft, Millelstand und Energie des Landes NRW; Go! Website (www.go.nrw.de)

Tailor-made policy schemes

The second approach concerns new tailor-made policy schemes for entrepreneurship in creative industries mainly for start-ups. These policy schemes are integrated in broad package of policies for creative industries, accommodated within wider cultural policies, or it concerns new and independent policies for creative entrepreneurship. The supervision of these policy schemes is in the hands of established economic or cultural agents or newly developed organisations. Table 6.1 highlights some examples of policies promoting entrepreneurship.

Table 6.1: Policies to stimulate entrepreneurship

Australia - New South Wales	Grants for consultancy (by ArtsNSW)	Museums
Australia - Western Australia	Awards for improving company performance and stability (by Screen West)	Film and TV
Austria	Consultancy services for artists and the business community (by KulturKontakt)	Creative Industries
Austria – City of Vienna	Departure Expertpool (By Departure)	Creative Industries
Belgium - Flanders	Management support and coaching to cultural entrepreneurs (through CultuurInvest) / Flanders District of Creativity (by the Flemish Government)	Creative Industries
Finland	Several programmes within the Cultural Exportation Project 2005-2010 (by the Ministry of Education, the Ministry for Foreign Affairs and the Ministry of Trade and Industry)	Creative Industries
Germany - North Rhine Westphalia	Festival and Affair c/o pop (by Ministry of Economic Affairs and Energy of the State of North Rhine-Westphalia, City of Cologne, The Federal Cultural Foundation, and Gefördert Durch)	Music

Table 6.1: Policies to stimulate entrepreneurship (continued)

Ireland	Digital Hub Development Plan-2003-2012 (by the Irish Government)	Digital Media
	Design Service (by Enterprise Ireland)	Design
	Learning Waves - Skillnets (by Broadcasting Commission of Ireland - BCI)	Radio
Singapore	Several initiatives within The Renaissance City 2.0 programme (in the CI development Strategy-2003 by Ministry of Information, Communications and The Arts - MICA) / Creative Talent Fund (by Creative Community Singapore - CCS)	Creative Industries
	INVIGORATE - Mobile Game Development Initiative (by Media Development Authority - MDA)	Game
	Capability Development Scheme (by Media Development Authority – MDA)	Media
Spain - Catalonia	Servei de Desenvolupament Empresarial – SDA (Business Development Service) / Centre de Desenvolupament Audiovisual – CDA (Centre of Audiovisual Development) (by Catalan Institute of Cultural Industries - ICIC)	Audiovisual, publishing, press, performing arts and visual arts
United Kingdom	Cultural Leadership Programme 2006-2008 (jointly led by Arts Council England, Creative & Cultural Skills-SSC and the Museums, Libraries and Archives Council) / Starter for 6 (by National Endowment of Science, Technology and the Arts - NESTA)	Creative Industries
	Several initiatives by Skillset - Sector Skills Council-SSC for the Audio Visual Industries	Audiovisual

Special training programmes

How is entrepreneurship promoted in these tailor-made policies? Firstly, several countries have developed special training programmes for creative people. An interesting example of such a programme is *Insight Out* in the UK. *Insight Out* provides enterprise training for creative individuals. The programme is administered by NESTA but it is delivered in partnership with cultural organisations, higher education institutions and other support agencies across the UK. Insight Out is an example of entrepreneurship promotion across the creative industries, but there are also many examples of specific policies for the arts, architecture, design, film and media. The *Capability Development Scheme* in Singapore is a programme stimulating Singapore's media businesses to invest the development of its employees through specialist courses offered locally and abroad. The Media Development Authority of Singapore co-funds courses that improve creative talent, business management skills and get to know emerging technologies.

Financing the use of specialist consultancy services

Other programmes stimulate entrepreneurship through (co-)financing the use of specialist (business) consultancy services. The *Departure Experts* programme of Departure Vienna funds 50 per cent of the use of advice concerning market research, internationalisation, exploitation of intellectual property rights, business partnerships, joint ventures etc. The Departure Experts programme covers the broad range of creative industries. The *Centre of Audiovisual Development (CDA),* established by the Catalan Institute of Cultural Industries in 2005, offers free consulting services to audiovisual companies in the development of their projects and it provides training services for professionals in the audiovisual sector. The *Film Skills Fund* by Skillset (Sector Skills Council-SSC for the Audio Visual Industries) in the UK funds training grants for individuals, companies and training providers seeking to attend or deliver film-specific training.

Workshops for creative entrepreneurs

Another popular theme is setting up workshops where creative entrepreneurs exchange experiences. The *Flanders District of Creativity* (founded by the Flemish Government in 2004) which organises creativity workshops is one example but there are many, mostly for particular branches of the creative industries. Workshops are also combined with events such as the *c/o pop event* in North Rhine-Westphalia. Workshops in business start-ups, business management, marketing, property rights are combined with a festival for electronic music. This approach is not uncommon for the film industry as well.

Special scholarships

In some cases, special scholarships are also used as an instrument to stimulate entrepreneurship. For example, professionals who are currently employed in the Flemish creative sector or in the Flemish public sector can apply for two scholarships for the exclusive Vlerick Leuven Gent Management School Master Class in Innovation & Entrepreneurship. Interestingly, the Danish government aims to include a greater element of business orientation in arts studies as part of multi-year agreements on education. The objective is to make it easier for candidates to adjust to the future labour market, and to ease the transition to a professional life as freelancer or being self-employed.

Leadership programmes

An emerging trend concerns programmes to stimulate leadership to develop the potential of the creative industries. A particularly innovative programme is the *Cultural Leadership Programme* in the UK.

Box 6.2: Cultural Leadership Programme 2006-2008 – United Kingdom

The Cultural Leadership Programme is a two-year treasury funded programme jointly led by three sector organisations; Arts Council England, Creative & Cultural Skills and the Museums, Libraries and Archives Council. The main goal is to reinforce the impact of cultural and creative industries in the UK economy by investing in leadership. The two main targets are to establish a culture of strong leadership and to seek diversity among the future leaders, with a special focus on potential leaders from black or minority ethnic background.

The programme is delivered through a strategic, six-strand approach prioritising:

1. Work Based Opportunities: supporting networks, placements, coaching & mentoring and other approaches to learning in the workplace
2. Creative Knowledge Lab: the development of a unique learning resource through a dedicated online service and web portal
3. Intensive Leadership Development: formal learning opportunities to gain key knowledge and skills for leadership
4. Powerbrokers: black and minority ethnic development priorities to drive forward the change needed to diversify the leadership of the cultural and creative industries
5. Governance development: to establish and promote best practice for governing bodies within cultural organisations, embedding an understanding of the need for leadership in governance
6. Developing entrepreneurs as leaders: defining leadership learning needs and creating appropriate opportunities.

Source: Cultural Leadership Programme website (www.culturalleadership.org.uk)

Integration of design and creativity in educational programmes

Another interesting development is the integration of design and creativity in educational programmes for children and adolescents and students. Recently, the Turkish Ministry of Education has launched 'Technology and Design' courses in the public education curriculum from the 6^{th} till the 8^{th} grade. A pilot project in the UK *Joinedupdesignforschools* links UK designers with schools across the country. *KulturKontakt* in Austria provides advice and support for arts and culture projects in all Austrian schools and for arts and cultural education concepts. Of course, these initiatives do not result in more creative entrepreneurs in the short run. These initiatives aim to stimulate creativity and raise awareness on the role of design and creativity.

Table 6.2: Policies for Education, Culture and Creativity

Australia	Australianscreen online/ Industry and Cultural Development Schools Programme (by Australian Film Commission)	Film
Austria	Arts + Cultural Education (Kunst- und Kulturprojekte an Schulen) (by KulturKontakt)	Arts
Denmark	Multi-annual Accord on the Ministry of Culture's Study Programmes related to Denmark's Creative Potential – 2000 (by Ministry for Culture and Ministry for Trade and Industry)	Arts

Table 6.2: Policies for Education, Culture and Creativity (continued)

North Rhine Westphalia	Go! to School (by Ministry of Economic Affairs and Energy of the State of North Rhine-Westphalia)	Creative Industries
	Schule und Kultur (School and Culture) / Grants programme popUP (by NRW KULTURsekretariat)	Theatre/Music
Singapore	Build creative capabilities through embedding arts, design and media within all levels of education (within The Creative Industries Development Strategy-2003 by Ministry of Information, Communications and The Arts - MICA)	Arts, Design, Media
United Kingdom	Creative Industries Higher Education Forum (by Department for Culture, Media and Sport - DCMS) / Creative Partnerships (by the Arts Councils of England) / Insight Out (by National Endowment of Science, Technology and the Arts - NESTA) / Joinedupdesignforschools-2001 (created by the Sorrell Foundation and supported by Department for Education and Skills and DCMS)	Creative Industries
	The 14-19 Creative and Media Diploma (by the Sector Skills Council for the Audio Visual Industries)	Audiovisual

We should also mention that creative entrepreneurs are also welcome in the existing programmes to stimulate entrepreneurship at the local, regional or national level. In some of the countries, policymakers do not see the need for special policies for creative industries and creative entrepreneurs are treated just like any other entrepreneur. However, the overall picture is that most of the selected countries and regions have developed special policies promoting entrepreneurship for creative industries. The majority of these initiatives are developed in partnership involving government departments, traditional cultural institutions, (higher) educational institutions and specialised agencies for (branches of) the creative industries. Sometimes, economic development agencies support or Ministries of Economic Affairs are also included.

7 Access to venture capital

Access to venture capital for creative industries

Few countries have developed policies to raise opportunities for creative industries regarding access to venture capital. One of the first in Europe is France. In 1983 the French Ministry of Culture and the Ministry of Economy and Finance created the *Institut pour le Financement du Cinéma et des Industries Culturelles (IFCIC)* (Institute for financing cinema and cultural industries), a credit institute whose mission is to contribute to the development of the French cultural industries through facilitating their access to bank financing. Recently the United Kingdom has stressed the importance of securing continued growth of creative industries by improving their access to funding. "The key issue is not the availability of finance or business development services; rather it is the access and use made of this funding and support by creative businesses. Specifically, it is the low propensity and ability of many creative businesses to make full use of the available finance, advice and expertise that inhibits increased productivity and growth in the creative industries" (DCMS/Creative Economy Programme, *Business Support and Access to Finance Group*, 2006)[12].

Box 7.1: Advantage Creative Fund - United Kingdom

The Advantage Creative Fund is the outcome of a national conference held in October 2001 by the DMCS on 'Good Practice in Financing Creative Businesses' to sort out the financial needs and improve access to financial resources for creative industries. It was concluded that particularly SMEs were experiencing difficulties in raising capital fund for start-up and business growth. Therefore, in addition to other new finance schemes, the Advantage Creative Fund (ACF) was developed. The ACF is a £5 million community venture capital fund (created by Advantage West Midlands, Arts Council England and European Regional Development Fund) for supporting small creative business which can have problems with banks unused to treating intellectual property as collateral, and to address the equity gap in more traditional investment. The ACF provides venture capital for companies - especially SMEs that are relatively more exposed to risks in business growth - to expand their businesses in the creative sector. The Fund provides capital investments of up to £130,000 for businesses in creative industries. The ACF is dedicated to commercial exploitation of products and services made by creative businesses. It does not offer grants or loans but invests on strictly commercial terms in the share capital of creative businesses that are capable of generating profits and growth (Research and Library Services Division of the Legislative Council Secretariat, Information Note. Development of Creative Industries in the United Kingdom, IN14/02-03, 2003). The Fund will share in the creative industries' future profits and normally does not seek any security or personal guarantees. Up till now, the fund has invested in over 28 companies operating within a wide spectrum of creative industries including film production, animation studios, orchestras, software companies, television and new media businesses.

Source: Advantage Creative Fund website (www.advantagecreativefund.co.uk)

[12] The document can be downloaded at www.cep.culture.gov.uk. See *Appendix 3 - Creative Industries Funding Map* for an overview of the UK creative industries funding opportunities.

The investigation shows that access to venture capital policies will be more important in the near future. In Finland one of the aims of the *Cultural Exportation Project 2005-2010* (by the Finnish Ministry of Education, Ministry for Foreign Affairs and Ministry of Trade and Industry) is to promote cultural entrepreneurship and capital funding in the cultural production sector. Venture capital and project funding will be promoted by the Ministry of Trade and Industry, Finnvera (the state-owned export credit agency), the Finnish Industry Investment Ltd. (state-owned investment company) and creative industries venture capital funding such as the CIM Creative Industries Management Ltd.[13] (a private company). In Belgium, the Flemish government has recently established the programme *CultuurInvest* that not only offers access to venture capital but also re-invests the profits made into the creative sector. A similar re-investment initiative has been developed by the Catalan Institute of Cultural Industries through the *Repayable Contributions Programme*, a system for financing cultural projects. It has been created in 2002 in response to the difficulties Catalan cultural companies were encountering in obtaining external financing for new projects, the programme ensures a more efficient management of public resources since contributions are repaid, bringing benefits to the entire cultural sector by releasing resources for other less profitable projects. From 2002 until 2005, the system helped 101 projects held by 60 companies.

Box 7.2: CultuurInvest – Flanders (Belgium)

In 2006 the Flemish government launched the new programme CultuurInvest to provide access to venture capital to several creative industries. The sectors covered include new media and computer games, the audiovisual sector and digital design, the music industry and concert scene, design and fashion design, printed media and graphic design, publishing and the book trade, music, performing arts, and distribution companies within the visual arts sector. Through CultuurInvest the Flemish government acts not only as a subsidiser but also as an investor in cultural initiatives. Opportunities are also offered to the private sector to be an investor partner in creative industries (Council of Europe/ERICarts, *Cultural Policies in Europe: a Compendium of basic facts and trends*. Strasbourg: Council of Europe, 2006). CultuurInvest aims to begin a constantly rolling fund by re-investing the profits into the creative sector.

CultuurInvest has three types of support:

- project financing: short term and bridge financing for specific projects
- growth capital: capital participation in more mature growth companies
- subordinated loans: quasi-capital as long-term investment in the companies belonging to the target sector.

CultuurInvest also facilitates the further financing of culture entrepreneurs through:

- a collaboration with Vinnof (Vlaams Innovatiefonds - Flemish Innovation Fund) which invests risk capital into innovative, start-up enterprises
- a renewed guarantee arrangement which allows acknowledged credit granters to cover the credits granted to companies with a government guarantee
- other instruments, such as the co-financing of projects supported by the Federal Participatiefonds (Participation Fund).

[13] CIM is fund management and venture capitalist private company created in 2000 in Finland which manages the CIM Venture Fund for Creative Industries L.P. (entertainment, education and intellectual property rights industries). Its sister company, CIM Finance & Research L.P., is a financial advisory and fund management company with a subsidiary in Scotland (CIM 64 Scotland). CIM has a network in the Nordic Countries, Europe, USA and Japan.

Sources: Council of Europe/ERICarts, Cultural Policies in Europe: a Compendium of basic facts and trends. Strasbourg: Council of Europe, 2006 / CultuurInvest website (www.cultuurinvest.be)

Access to venture capital not specific for creative industries

Recently creative industries have also started to apply to technology funds and start-up funds. In the United Kingdom, the recent investment portfolios of Business Angels Network such as TEChINVEST or Yorkshire Association of Business Angels contain a large number of potential investments sought by companies and partnerships working in creative industries (DCMS/Creative Economy Programme, *Business Support and Access to Finance Group*, 2006). In Singapore the Start-up Enterprise Development Scheme (SEEDS) is a S$80 million fund administered by the SEEDS Capital Pte Ltd, a fully owned subsidiary of the Singapore Economic Development Board (EDB). It provides equity financing for start-ups. SEEDS matches private investment from third party investor up to a maximum of S$300,000. The start-up should therefore apply together with the third party investor. SEEDS is established for all start-ups, so not specifically for creative industries; however the Design Singapore Council recommends it among its assistance programs.

Access to venture capital for specific creative industries sub-sectors

To increase access to funding Creative New Zealand, National Services Te Paerangi[14] and the Ministry for Culture and Heritage with the Funding Information Service have launched in April 2007 a search engine aimed at helping cultural organisations and individuals search for potential sources of funding for their projects. The funding guide is hosted by the cultural portal NZLive.com – New Zealand Culture Online, a website set up in September 2006 to promote cultural organisations, their activities, services, and products. Funding organisations and cultural organisations were consulted during its development. These included art galleries, museums, heritage organisations, theatres, and other performing arts groups. Other programmes have been developed for specific sub-sectors of the creative industries. The *Loan Program for Book Publishers* was launched in 1998 by the Department of Canadian Heritage and the Royal Bank in order to help Canadian book publishers' gain and increase their access to bank financing. In South Korea the Korea Game Industry Agency (KOGIA) is evaluating venture businesses in the field of game industry while Korea Culture and Content Agency (KOCCA) is facilitating Korean companies in their involvement in international joint ventures and partnerships; Korean Film Council (KOFIC) set up a specific *International Co-Production Film Support Program*. In its Strategic Plan 2004-2007 New Zealand Film Commission seeks to further develop private investment in films and international co-financing opportunities including co-production treaties. *Film Fund 2* was set up in July 2006 by the New Zealand Film Commission, as the new structure for financing and managing investment in larger-budget New Zealand feature films. Generally, Film Fund 2 expects to share in no less than 50 per cent of the profits pro rata and together with other equity investors. ScreenWest, Western Australia's film funding and development agency, set up a *Production Fund* with two tiers of funding (up to 15 per cent or up to 25 per cent of the total production costs) in order to increase the financing opportunities by triggering or

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[14] National Services Te Paerangi is a unit within the Museum of New Zealand Te Papa whose mission is to strengthen the museum sector by providing practical and strategic help to museums and iwi throughout Aotearoa New Zealand.

complementing other funding sources. ScreenWest has also set up a *Matched Development Investment Funding* in order to match project development funding received by a Western Australian-resident company, or in Western Australia, from a nationally or internationally recognised broadcaster or distributor. Matched funding is seen as an investment in the project, and limited to a maximum of $25,000 per application, with a company limit of $50,000 per financial year.

Few countries have developed policies to raise opportunities for creative industries regarding access to venture capital. Not only efforts are made to increase entrepreneurship and better understanding of business and finance within creative industries but efforts are also made worldwide to raise awareness within banks and financial institutions on the creative sector investment opportunities and commercial potential. Creative industries have recently started to apply also to funds for general industries (e.g. start-up funds, technology funds, etc.). The general picture is that it is not a problem of availability of funding in general, but of increasing access to funding together with improving entrepreneurship in creative industries. Specific policies for sub-sectors are predominant. However, the research indicates that establishing links between creative industries, venture capital funds and other capital funds and business networks needs to be improved.

8 Market development

Most countries have special policies to facilitate market development for creative industries. The main idea behind national policy intervention in this area is that creative industries need a helping hand when it comes to the development of markets abroad. 'Developing your creative business abroad' is considered a challenge for the relatively small creative entrepreneurs.

Integration of creative industries in the strategies to promote economic development, trade and investment

One of trends is the integration of creative industries in the strategies to promote economic development, trade and investment. The *Innovation Platform* of the Dutch government has selected creative industries as on of the four key areas where Dutch companies and knowledge institutions can excel. These four key areas have been incorporated in the policies of the Ministry of Economic Affairs. *New Zealand Trade and Enterprise* (New Zealand's national economic development agency) has selected creative industries[15] as 'one of the keys to New Zealand's economic transformation'. The objectives are to fuel the growth of creative industries sector and enhance the use of creativity and innovation across the economy through enabling, connecting and helping creative industries to develop commercial arrangements to exploit their market potential. One of their key projects is The Better by Design Programme aiming to increase New Zealand's export revenue "by making world-class design a bigger differentiator for New Zealand products and services". The creative industries are also part of the export strategy of *UK Trade & Investment* - a government organisation offering trade services for UK companies and investment services for overseas businesses. The creative industries are incorporated in the category creative & media[16]. The priority export markets are China, France, Germany, Japan and the USA. In addition, they have developed an international marketing strategy for creative industries. Note that the promotion of creative industries is not their exclusive domain. For instance, the British Council also promotes creative industries. A final example is the Swedish Trade Council that promotes Swedish exports. They have identified the *Swedish Experience Industry*[17] as one of the Swedish growth sectors (see section 5 on Innovation policies).

[15] The New Zealand Creative industries include screen production, television, music, design, fashion, textiles and digital content.

[16] Creative industries sector comprises of many different sub-sectors in line with the Department of Culture, Media & Sport (DCMS) definition of the creative industries mentioned in Section 2.

[17] The Experience Industry concerns Architecture, Art, Computer games, Design, Fashion, Film/Photo, Food &Drink, Literature/Publishing, Market Communication, Media, Music, Performing Arts and Tourism. The Swedish concept of the experience industry concerns a consumer perspective, whereas the creative industries are a supply-side perspective.

Box 8.1: Creative Industries International Trade Strategy – United Kingdom

The overall objective of the Creative Industries International Trade Strategy is to help creative industries win business overseas by adding value through business support, information or advice where there is a perceived market failure. The strategy is needed to increase the competitiveness of creative industries and to overcome the difficulties in accessing international markets with appropriate information on market and legal issues. It has been developed by UK Trade & Investment in cooperation with the industry and key stakeholders.

The strategy includes a list of markets where the UK government can add value and support industry at national level to overcome barriers such as piracy and taxes. The framework has introduced sector-specific strategies and has built up creative industries export advisory groups to strengthen the linkages between government and industries. The sector-specific strategies include computer games, design, film, music, performing arts, publishing, and television industries.

Some of the objectives are:

- to ensure the more effective coordination of the sector, identifying the strengths and capabilities, to develop relevant support mechanisms for exporting
- to improve the effectiveness of the Creative Industries Exports Advisory Groups and their ability to communicate with, and represent, their industries
- to improve the quality of information on business opportunities and trends in key markets
- to provide a commercial presence with industry at relevant Cultural events/festivals
- to assist creative industries develop opportunities across other sectors, e.g. tourism and construction
- to work with other government departments to lobby WTO and EU on barriers to trade.

A good example of a sector-specific strategy is the set up of a design advisory export group - the Design Partners. Their strategies contain forming new partnerships with the international design bodies, recognising design as a key part in the supply chain and working with other sector teams in the UK Trade & Investment for working on joint projects in (for 2005) automotive, aerospace, construction, health care and medical, financial services, leisure and tourism, and encouraging the government to showcase design in their relevant websites.

Source: Ministry of Trade & Investment (2005) Creative Industries International Trade Strategy 2005-2006 (the document can be downloaded at downloads.uktradeinvest.gov.uk/creativeindustriesinternationaltradestrategy2005-06.pdf)

Broad creative industry programmes in the cultural sector

The three examples of integrating creative industries in the strategies of international economic agents involve all sub-sectors. We can also find examples of such a broad approach including not all but most of the creative sub-sectors, originating from the cultural and educational sector. An interesting example is the *Cultural Exports Promotion Programme* that has been initiated by the Finnish Ministry of Education. Table 8.1 lists the broad approaches to creative industries.

Table 8.1: Market development policies for (groups of sub-sectors of) creative industries

Belgium - Flanders	Marketing, communication and public relations work and initiatives (by CultuurNet Vlaanderen)	Creative Industries
Finland	Cultural Exports Promotion Programme 2007-2011 (by Ministry of Education, the Ministry for Foreign Affairs and the Ministry of Trade and Industry)	Creative Industries
The Netherlands	Programme for the Creative Industries 2005-2008, (by Ministry of Culture and Ministry of Economic Affairs)	Creative industries
New Zealand	Local, national and international opportunities and markets / Audience and market development strategies (by Creative New Zealand)	Literature, performing arts, visual arts, crafts, audiovisual
New Zealand	Developing creative industries in New Zealand (by New Zealand Trade and Enterprise)	Creative Industries
Singapore	Creative Business Fund (by Creative Community Singapore – CCS)	Creative Industries
Spain - Catalonia	Cultural Consumer Club of Catalonia (by Catalan Institute of Cultural Industries, Televisió de Catalunya (TVC) and Catalunya Ràdio)	Audiovisual, publishing, press, performing arts and visual arts
United Kingdom	Creative Exports Group-2002 (by DCMS Creative Economy Programme) / Creative Industries International Trade Strategy 2005-06 (by UK Trade & Investment)	Creative Industries

Box 8.2: Cultural Exports Promotion Programme 2007-2011 – Finland

The working group for the Development of Cultural Exports under the Finnish Ministry of Education has launched the programme for Cultural Exportation Promotion 2007-2011. The Ministry of Education, the Ministry of Foreign Affairs and the Ministry of Trade and Industry have developed this ambitious programme. The programme's vision is that the cultural exports will have grown into an acknowledged part of Finnish exports, having created new jobs. The value of cultural exports will have at least tripled and the creative sectors will have made the structure of industry and commerce more varied. Culture will form a distinctively more pronounced part of Finland's country image and brand. The economic prosperity of individuals and groups working in cultural sectors will have improved through cultural exports.

The strategic objectives of cultural exports are defined as:

- Strengthening the role of culture as the foundation of well-being and success
- Developing cultural exports in a broad manner covering both commercial and non-commercial exports
- Improving entrepreneurship in cultural sectors

- Consolidating public structures supporting cultural exports
- Improving Finland's know-how and knowledge-base on cultural sectors
- Getting international recognition for Finland and its culture in particular
- Enhancing cooperation between the relevant ministries that promote cultural exports and the creative sectors.

Entrepreneurship is prioritised. Different types of funds will be implemented in order to promote entrepreneurship in creative industries. In total, approximately €228 million will be allocated for the Cultural Exports Programme between 2007 and 2011.

The programme plans to use: programmes and sets of measures, project financing, export circles, joint initiatives and training, sectorial research and statistics, support network for cultural exports, and the general support system for the arts and culture. The Presidential Award for Cultural Export has been established as recognition for the most feasible export concept and as a way to give visibility to new innovative concepts. The award is implemented by the Ministry of Education and the Ministry of Trade and Industry together.

One of the measures to promote cultural exports is the establishment of *CREAFIN: Finland's Creative Economy Cluster*. The CREAFIN concept should develop into a new high quality and innovative brand for creative production in Finland. CREAFIN should be known for its core activities in ICT, cultural production, service production, science and research, training and education, art and other sectors representing the production of meaning; for its brand-creating concept and for its multi-sectoral operations through science and cultural production.

CREAFIN is not a geographical cluster but it involves all stakeholders in the value chain of cultural exports. The three Ministries subscribe to the CREAFIN vision depicted in the diagram below:

CREAFIN vision 2010

Cultural dimension: 1. High artistic standards 2. Expertise in meaning production 3. CREAFIN introduced as Finland's brand 4. Finland attracts top talent in the creative sector 5. Finland becomes an attractive area in terms of its creative economy.	**Ethical dimension:** 1. Ethical capital will grow 2. Ethical production standards will reduce conflict 3. Ecological production, sustainable development 4. A society with equality 5. Role as expert in global cooperation 6. 'Fair trade cultural exchanges'.
Social dimension: 1. Social capital grows 2. Creative capital becomes a core area of social capital 3. A creative welfare society 4. An interactive society 5. Multiculturalism 6. Balanced regional development.	**Economic dimension:** 1. Creative capital becomes Finland's foremost competitive advantage 2. Employment in creative economy will reach 40% of workforce 3. Employment in cultural production will reach 15% of workforce 4. Enterprises in cultural production reach 40,000 enterprises 5. Cultural production will account for 10% of GDP.

Sources: Ministry of Education and Ministry for Foreign Affairs (2007) Do Finnish Cultural Exports Have Staying Power? YES! Proposal for Finland's Cultural Exports Promotion Programme, Publications of the Ministry of Education, Finland 2007:9 (the document can be downloaded at www.minedu.fi/OPM/Julkaisut/2007/); Ministry of Education, Ministry for Foreign Affairs and Ministry of Trade and Industry (2005) Staying Power to Finnish Cultural Exports: The Cultural Exportation Project of the Ministry of Education, the Ministry for Foreign Affairs and the Ministry of Trade and

Industry, Publications of the Ministry of Education, Finland 2005:9 (the document can be downloaded at www.minedu.fi/export/sites)

Specially designed market development policies for sub-sectors of creative industries: film and media

Most of the examples of export promotion for creative industries originating from the cultural and educational sector are not generic but specially designed for a sub-sector of the creative industries. The most developed sub-sector is film and media in general. *Unifrance* is a well-known example of an organisation promoting French cinema worldwide. It operates under the direct supervision of the Centre National de la Cinématographie (administered by the Ministry of Culture) and the Ministry of Foreign Affairs also funds it. Unifrance "accompanies French films from their sale to their distribution in foreign territories". The organisation has developed expertise on the market in more than 50 countries and it supports French movies at international film festivals and international market presentations, and with commercial releases. It strives for maximum exposure of French cinema through its website, new letters and through organising or supporting special French film festivals abroad. Unifrance focuses on export promotion whereas supporting the creation of new movies is the responsibility of another organisation. The *New Zealand Film Commission* combines both the financing of New Zealand filmmakers (through loans and equity financing) and export promotion. The latter concerns the support for New Zealand films at film festivals, acting as a sales agent for movies with financial support from the council and by establishing contact with distributors. There are similar organisations to these two examples in many countries (see Table 8.2).

In some countries, film is included in a broader organisation that covers the media such as the *Ontario Media Development Corporation*. This organisation promotes "innovation, investment and employment in Ontario's media sector book publishing, film and television, magazine publishing, music and interactive digital media industries". Local companies can apply for support from a range of special funds for the abovementioned sub-sectors under the umbrella of the *Content and Marketing Funds* and it administers a wide range of tax credits for these sub-sectors. Another interesting initiative in Singapore's creative industries strategy is *Media 21*. Singapore's relatively small domestic market is seen as a handicap to develop media content. The idea is that an increase of exports strengthens content development in Singapore's media sector. A *Content Development Fund* has been set up to support initiatives of Singapore-based media companies to develop content with foreign partners.

New kid on the block: gaming

A more recent phenomenon is the promotion of the game industry such as the France Game Internet portal started by the Ministry of Foreign Affairs in cooperation with private stakeholders united in the AJVC (French organisation of video games). The *Korea Game Industry Agency (KOGIA)* has received international attention for its efforts to develop and promote South Korea's game industry at home and abroad (see Section 5 on Innovation policies). The ambition is to become one of the top-three gaming nations globally. One of the elements in the strategic plans is to foster international collaboration and export promotion. KOGIA sets out to encourage participation of domestic game companies in international events and to represent the Korean Game industries at international expositions (with a special Korean Game pavilion). International networking is another top priority.

Design as an export tool

In the area of design, we also find special measures for market development. We have already discussed New Zealand's *Better by Design* programme. The *Danish Design Centre* also promotes the use of design in Danish companies. The primary task is to engage in business promotion activities to highlight the economic potential of using design. The *Singapore Design Council* offers design companies a double tax deductions scheme for market development. Companies that qualify for this scheme are allowed to deduct twice the legible expenses for activities such as setting up overseas marketing offices, participation in trade fairs or exhibitions, develop a catalogue for foreign markets and feasibility studies.

There are many more initiatives in the field of market development such as special programmes for the fashion industry (*Designer Fashion Programme* of ArtsWA in Western Australia), national or regional thematic branding such as *Catalan Arts!*, programmes to fund travel of creative people, and programmes to stimulate market development through digitalisation (see also table 8.2).

The general picture is that market development policies for creative industries can be found in most of the selected countries. It is also clear that there is a trend to incorporate creative industries in traditional economic export promotion. Generally speaking, the approach to creative industries is not fundamentally different from other selected sectors for international market development. There are differences but these are subtle. Usually, representatives of the creative industries are involved in fine-tuning of the policies for their industry. At the same time broad strategies for market development in creative industries have come from the field of culture and education. However, the majority of policies are tailored to (a group of) specific sub-sectors.

Table 8.2 Market development policies for sub-sectors of the creative industries

Art	Canada Travelling Exhibitions Indemnification Program (by Government of Canada)	Canada
	ACCESS II (Arts and Culture Enhancement Support Scheme II) -2007- 2009 (by the Department of Arts, Sport and Tourism)	Ireland
	International Support / The National Touring Exhibitions / International studio Programme / International Visitor Programme (by Office for Contemporary Art Norway - OCA)	Norway
	Thematic brands - CATALAN! ARTS (by Catalan Institute of Cultural Industries - ICIC)	Spain - Catalonia
Performing Arts	Guarantee Against Loss (by ArtsNSW: Performing Arts Touring Programme)	Australia – North South Wales
	Support independent theatres and dance companies (by Arts Council)	Norway
	2-Year Major Grant (by National Arts Council - NAC)	Singapore

Table 8.2 Market development policies for sub-sectors of the creative industries (continued)

Music	Support to Sector Associations Program / Collective Initiatives Program (by Canada Music Fund)	Canada
	Music Export Denmark - MXD (joint initiative of Denmark's Radio, The Roskilde Festival/the Venue Foundation the Danish Rock Council-ROSA)	Denmark
	Business Expansion Scheme for Music (by the Department of Arts, Sport and Tourism)	Ireland
	Room for art / Support the creative aspects of Norway's music community (by Arts Council Norway)	Norway
	Distribution and marketing funds (by Osterreichscher Musikfonds (Austrian Fund for Music)	Austria
	New Zealand Music into the global market (by New Zealand Music Commission)	New Zealand
	Commercial Development (by ArtsWA: Contemporary Music Grants Program)	Australia – Western Australia
Film & Media & Audiovisual	Marketing Loan / Production Cash Flow Facility / Short-term Development Investment Facility / International market representation / Inside Track / Meetmarket / Festival visitors (by Australian Film Commission)	Australia
	Cross Media Challenge (by National Film Board of Canada - NFB)	Canada
	Content and Marketing Funds (by Ontario Media Development Corporation – OMDC)	Canada - Ontario
	Development support / Marketing and distribution support / Post-release support for production (by Finnish Film Foundation)	Finland
	Unifrance (by Centre national de la cinématographie-CNC (National Film Centre) and Ministry of Foreign Affairs) / Financial aid for exhibition / Support to national associations for experimental films and research (by CNC) / Espaces Culture Multimédia (by Ministry of Culture and Communication)	France
	Development Loans for Feature Length Fiction Films / Production Loans for Feature Length Fiction Films / Production Loans International (By Irish Film Board under the Department of Arts, Sport and Tourism)	Ireland
	Loan and equity financing (by New Zealand Film Commission)	New Zealand
	Subsidies for the marketing of Norwegian films abroad (by The International Department at the Norwegian Film Institute)	Norway

Table 8.2 Market development policies for sub-sectors of the creative industries (continued)

Film & Media & Audiovisual	Financial support to Film Distribution / Financial support to Film Promotion / Cinema Exhibition / Alternative Film Exhibition Network Programme (by Institute for Cinema, Audiovisuals and Multimedia - ICAM)	Portugal
	Market Development Scheme / International Co-Productions (by Media Development Authority - MDA) / Co-Investment Scheme / Project Development Scheme / Short Film Grant (By Singapore Film Commission - SFC)	Singapore
	Mortgage Loans for Screening Facilities / Art Plus Cinema Network / DVD Production and Distribution Support for Independent Films/ Filmmakers Development Lab / Business R&D Campus / DVD Production and Distribution Project / Building Overseas Networks with International Film Festivals and Organizations (by Korean Film Council - KOFIC)	South Korea
Design	Several initiatives within by Danish Design Centre	Denmark
	Several initiatives within the National Design Programme: Design! 2005 (by Design Forum)	Finland
	The Better by Design Program (by New Zealand Trade and Enterprise)	New Zealand
	Local Enterprise Technical Assistance Scheme - LETAS (by SPRING Singapore) / Design Television Programmes Grant / DesignSingapore Overseas Scholarship / Promotion of Singapore Design Overseas Partnership Programme - OPP (by Design Singapore Council) / Double Tax Deduction (DTD) Scheme for market development (by International Enterprise Singapore)	Singapore
Fashion	Grants for Fashion Research & Development Travel / Marketing / Business Development (by ArtsWA: Designer Fashion Programme)	Australia – Western Australia
	Strengthening Overseas Marketing (by Seoul Metropolitan Government)	South Korea
Game	France game internet portal / France. The Rising Playground promotion campaign (by Ministry of Foreign Affairs)	France
	Digital Exchange Partners – Games market Access Programme (by Infocomm Development Authority - IDA)	Singapore
	Several initiatives by Korea Game Industry Agency - KOGIA	South Korea

9 Creative clusters

Promoting the development of economic clusters has become fashionable in economic policies and creative industries are no exception. The idea behind the development of *creative clusters* is that cultural industries have strong place-bound characteristics, relying on local production networks. Furthermore, they operate through a specific spatial logic and pattern: they are highly dependent upon each other's proximity, with a natural tension to clustering as this provides them with competitive advantages, flexible specialisation and increasing return effects, through economies of agglomeration and scope, creative exchange and networking (Scott, 2000)[18]. Cultural industries are predominantly attracted to and located in cities where they tend to locate in specific quarters and districts. Today every city wants to attract the 'creative class', every city wants to become a 'creative city', and every city has interest in hosting big cultural institutions and major cultural events, in planning 'creative clusters'. Scott (2006)[19] recently highlighted how "the mere presence of creative people is certainly not enough to sustain urban creativity over long periods of time. Creativity needs to be mobilized and channelled for it to emerge in practical forms of learning and innovation". Creativity cannot be copied from a city and imported in another one, "but must be organically developed through the complex interweaving of relations of production, work, and social life in specific urban contexts" (Scott, 2006). The creative cluster policies are therefore strongly linked to innovation and entrepreneurship policies.

In 1994, Finland launched the *National Centre of Expertise Programme* which due to its success has been extended several times until 2013. It aims to pool local, regional and national resources in order to develop selected internationally competitive fields of expertise, and stimulate technology transfer between universities and firms, especially SMEs. The National Centre of Expertise Programme works as an instrument for regional development, decentralising national responsibilities to the regions, fostering regional strengths, inter-regional specialisation and cooperation. Fields of expertise are selected based on the strong and developing research, education and business activities of a region. Selected clusters are given a strategic status and specialised development agencies are created to guide the development of these clusters (e.g. Oy Media Tampere Ltd. and Culminatum Oy in Helsinki). In the new Centre of Expertise Programme for the period 2007–2013 the Government has approved 13 nationally significant clusters of expertise and 21 Centres of Expertise. New fields included in the programme are tourism, the experience industry, culture, new media, e-learning and design, quality and environmental expertise. The experience industry, culture, new media and e-learning are grouped under digital media and content production (the two fields of creative industries and new media present in the previous programme were combined in this new field of expertise). The Centre of Expertise Programme allocates sectors of creative industries to regions as Table 9.1 illustrates.

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[18] Scott, A. J. (2000) *The Cultural Economy of Cities*. London: Sage.

[19] Scott, A. J. (2006) Creative cities: conceptual issues and policy questions. *Journal of Urban Affairs*, 28 (1): 1-17

Table 9.1: Centres of Expertise in Media and Content Production within the National Centre of Expertise Programme - Finland

Tampere	Media Services
Helsinki	Digital Media, Content Production and Learning Services, Software Product Business
South-West Finland	Cultural Production and Digital Content Production
Oulu	Software
Häme	Professional Expertise and Learning
Kainuu	Chamber Music
Lapland	Experience Industry

Source: Centre of Expertise Programme website (www.oske.net)

A well-known example of creative cluster in Finland is the *Arabianranta* in Helsinki. Arabianranta is a brownfield/waterfront redevelopment that combines art, design and technology in business, education and community development. The aim is to create the leading centre of art and design in the Baltic area between the years 2005-2010. The Arabianranta project built upon the relocation of the University of Art and Design Helsinki (UIAH) into the area in 1986. It was enabled by the decision taken in 1995 amongst all of the key land-owners and interest groups, to form a single public-private development company: Art and Design City Helsinki Ltd. The partnership included the City of Helsinki, the Ministry of Industry, the UIAH, the Helsinki Pop and Jazz Conservatory, the Hackman Ltd (owner of the main site and design rights of the former Arabia Company), two other property owners and a number of construction companies. Particularly the UIAH is playing a key role in the development of the area. Among the new projects, organisations and infrastructure set up thanks to the UIAH initiatives are: The Media Centre 'Lume' (the largest centre of audio-visual research and development in the Nordic countries), the Finnish Design Management Institute, the Designium - the New Centre of Innovation in Design (built upon close collaboration between the UIAH and other university institutions, polytechnics, businesses and public organisations) and the Media Lab. UIAH also coordinates the Artists' Development in Arabia, a project founded by the city aiming at the integration of the arts into the planning process of the area. The clustering of art, design and media schools in the area is accompanied by support to start-up companies and entrepreneurs through a local business incubator called Arabus.

In 2003 the Ministry of Information, Communications and Arts (MICA) in Singapore launched the Creative Industries Development Strategy. The aim is to develop a sustainable creative cluster for ensuring the growth of the competitive Singaporean creative economy. The targets have set out for 2012 and by that date, the Ministry seeks to double the contribution of creative industries in GDP from three up to six per cent (ERC Service Industries Subcommittee Workgroup on Creative Industries, *Creative Industries Development Strategy*, September 2002). The well-developed ICT infrastructure and business, and its established reputation for being Asia's financial hub facilitate Singapore to fuse arts, business and technology in its own innovative way. The strategy for creative industries aims to make Singapore the New Asia Creative Hub. The sector-specific initiatives are three-fold: *Renaissance City 2.0*, *Design Singapore* and *Media 21*. In 2005, in order to improve Singapore's profile as a creative hub, a comprehensive event was launched by the Ministry of Information, Communications and Arts: *Crea©tive 2005 – Reinvent Your Future*. The programme included Beyond 2005 - The Global Summit for Creative Industries, the Singapore Design Festival, the Asia Media Festival and the Creative Youth Xchange @ Gallery Hotel.

Table 9.2: The key initiatives of the Creative Industries Development Strategy by Ministry of Information, Communications and Arts (MICA) in Singapore

Renaissance City 2.0	Build creative capabilities (e.g. embeddedness of arts, design and media in all education levels) / Stimulate sophisticated demand (e.g. developing 'creative towns', Singapore Art Biennale) / Develop creative industries (e.g. promotion of entrepreneurship)
Design Singapore	Integrate design in enterprise (e.g. facilitation of the use of design by businesses) / Develop a vibrant and professional design community (e.g. establishing design testbeds) / Position Singapore as a global design hub (e.g. establishing a national design Council, a national marketing and branding strategy) / Foster a design culture and awareness (e.g. embeddedness of design in all education levels, design in the mass media)
Media 21	Develop a Media City in Singapore (e.g. Mediapolis @ One North, enhancing applied research in digital media) / Positioning Singapore as a Media Exchange (e.g. tax incentives to attract media investments) / Export made-by Singapore content (e.g. establishing a Content Development Fund) / Increase the media talent pool (e.g. enhancing skills and knowledge in intellectual property rights) / Foster a conducive regulatory environment and culture (e.g. clear and consistent regulations)

Creative clusters are usually developed and initiated by local or regional governments in form of public-private partnerships, although national authorities also recognise the importance of promoting and fostering the development of such clusters. Creative clusters policies are often part of the national industrial strategy aiming at the creation of innovation or competitive clusters. The main trend emerging at national level is the development of creative clusters fostering innovation through strong links between art, new media and technology, education and businesses. The creative cluster policies are therefore strongly linked to innovation and entrepreneurship policies.

Table 9.3: Some other examples of creative clusters

Austria – City of Vienna	MuseumsQuartier (by a joint venture for three quarters of the State and for one quarter of the City, and funded by the Federal State)
Denmark	Cultural entrepreneurial milieus are being organised nationwide (e.g. Louiz in Copenhagen) (by Ministry of Culture and Ministry of Trade and Industry)
France	IMVN Ile-de-France / CAP DIGITAL Paris Region (Pôle de compétitivité Cap Digital) (by French Government)
Ireland	Digital Hub Development Plan 2003-2012 (by the Irish Government)
Germany - North Rhine Westphalia	Zeche Zollverein (by North Rhine Westfalia)
Spain – Catalonia - City of Barcelona	22@barcelona: the innovation district (joint venture between the developer MediaComplex, the University Pompeu Fabra and Barcelona City Council – the cluster is a local initiative but with a regional focus: reinforcing Catalan innovation)

10 Intellectual property rights

The IP rights law is supposed to encourage creativity and assure rewards to creators. However, in the end it gives unbalanced benefits since the large corporations are the ones taking the largest share of the royalties. This is happing due to the fact most authors are not in a position of taking their own work to the market so they have to deal with big companies (e.g. major film and record companies). As Towse (2006)[20] pointed out "the power of copyright law to reward artists and other creators seems to be limited, while on the other hand it apparently provides disproportionate benefits to the large corporations that dominate the creative industries: the major film and record companies, printing and broadcasting corporations and the rest". To reward or encourage creativity, other alternative measures are being used such as grants, loans, access to venture capital to finance cultural production or other schemes such as the fixed book price. Copyright is actually a 'temporary monopoly' that can be exploited through the market via higher prices to the users often alimenting a vicious cycle: stronger IP, higher price, and piracy more likely to occur.

In recent years intellectual property rights laws have become stronger. In general, the powers of the national authorities in this field are limited. In December 1996, the WIPO[21] Copyright Treaty and the WIPO Performances and Phonograms Treaty were adopted by more than one hundred countries with the aim to adapt existing international copyright conventions to digital technology. In accordance with the WIPO Treaties, European countries have or are implementing the EU Directive concerning the *Harmonisation of Particular Aspects of the Copyright and Related Rights in the Information Society* (Directive 2001/29/CE).

Some OECD countries have extended the duration of copyright (e.g. Australia has extended the duration of copyright by 20 years to the life of the author of the works plus 70 years, and 70 years from the publication of sound recordings and films). Artist's Resale Right (*droit de suite*), which entitles artists to perceive a fee on the resale of their works of art, is now regulated in several countries in Europe applying the EU Directive 2001/84/EC.

Numerous copyright collective management societies are in charge of collecting reproduction and communication rights. In general, this should make the collection and distribution of royalties much easier. In particular in the music industry, copyright collective management societies have developed complex licensing and distribution mechanisms to protect copyright within the interactive multimedia community. However with the increasing use of Internet, it is becoming very complex to correctly define the type of agency that should be collecting the rights. A recent study by the European Commission - Study on a community initiative on the cross-border collective management of copyright (2005)[22] - aimed

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[20] Towse, R. (2006) Copyright and creativity: an application of cultural economics. *Review of economic research on Copyright Issues*, 2 (2): 83-91.

[21] World Intellectual Property Organisation.

[22] Commission staff working document (2005) *Study on a community initiative on the cross-border collective management of copyright*. Brussels: European Commission (the document can be downloaded at ec.europa.eu/internal_market/copyright/management/management_en.htm).

to improve the cross-border licensing for online music services. Several suggestions have been made by the European Commission[23]: a) leave the situation as it is; b) suggest ways in which cross-border cooperation between national collective rights managers in the Member States can be improved; c) give right-holders the additional choice of authorising a collective rights manager for the online use of their musical works across Europe.

The main challenges IP is facing come from the processes of digitalisation of cultural products and their distribution via internet: stimulus to creation and protection versus diffusion. Amendments are being made to face the challenges of the digital society. Anti-piracy plans have been developed. Governments are trying to find a good balance between setting the right incentives for creation and diffusion of protected works, and between the innovative uses of new technologies for online content and the necessary protection of associated IP rights while reducing online piracy. A new and fair use of intellectual property is being promoted, allowing exceptions for the utilisation of information for educational or cultural purposes, the promotion of innovation, and R&D activities. New alternatives to licensing within existing intellectual property right legislation have emerged, like the well known example of *Creative Commons*.

The new Intellectual Property Act in Spain and the setting up of the Authority for Regulation of Digital Rights Management in France try to respond to these challenges and issues. The independent Authority for Regulation of Digital Rights Management (*Autorité de Régulation des Mesures Techniques* - ARMT) has been set up in August 2006 (officially launched in April 2007) by the new French law on copyright (DADVSI) concerning the creators' rights in the information society. The aim of the Authority is to facilitate the access to music and cinema on the internet, with respect to the creators' rights. It will look upon the interoperability of the digital rights management systems and allow the private copies.

Box 10.1: Creative Commons Netherlands (CC-NL) – The Netherlands

Launched in 2004, CC-NL is collaboration between Stichting Nederland Kennisland (KL), the Waag Society (WS) and the Instituut voor Informatierecht (Institute for Information Law) of the University of Amsterdam (IViR). In September 2005 The Ministry of Science, Culture and Education decided to financially support CC-NL for two-and-a-half years (€700.000).

CC-NL is a generic licensing system which helps to have a much simpler and broader application of copyright in the digital domain without infringing the authors' rights. The licences are specially designed to enable the re-use of copyrighted works transparently and at low cost. The organisation aims to stimulate and investigate the application of CC licenses, especially those for content that is publicly financed.

The main characteristics of the licensing system are:

- its licences are free of charge to everyone. Accessible to the public via the internet
- it enables to standardise exploitation and users' contracts, increase transparency, create greater legal certainty, and minimise transaction costs
- it provides more economic efficiency of exploitation and distribution of copyrighted work

[23] Groenenboom, M. (2005) *Commission Recommendation on cross border licensing: Last train boarding now!* IvIR, Amsterdam (web publication: www.indicare.org/tiki-read_article.php?articleId=156).

- it allows authors and composers to make their works available without the involvement of the big record labels, or writers to distribute their own books
- it can be used by broadcasting companies or archives to make existing material widely available

Activities of CC-NL: Now that the introduction of the licences in the Netherlands has been completed, CC-NL activities are focused on the following areas:

- information and support for the use of the CC licences in the Netherlands
- research into the application of licences in specific sectors, and into existing obstacles in the use of licences
- knowledge exchange and co-ordination of activities on a European level.

Target groups are:

- individual authors in the music sector
- students of media studies and other culture-related subjects
- universities and colleges
- cultural heritage organizations
- archive managers
- government institutions.

Sources: Creative Commons Nederland website www.creativecommons.nl; Groeneveld, S., Keller, P., Hugenholtz, B. and L. Guibault Creative Commons Nederland, Work Programme 2005-2007, 2005 (the document can be downloaded at www.creativecommons.nl); Ministry of Economic Affairs and Ministry of Education, Culture and Science, Progress Report on the Programme for Creative Industries, 2006.

Box 10.2: The Intellectual Property Act 23/2006 – Spain

The Intellectual Property Act 23/2006 responds to the new social and economic situation in Spain and particularly to the challenge of providing more effective protection for creators while ensuring the dissemination of their creations. The Act tries to fill the gap between the current legislation and the challenge being set up by the new digital market.

Some amendments have been made to the traditional intellectual property rights of reproduction, distribution, and public communication:

- it clarifies that the right to reproduction includes reproduction by digital means, while also acknowledging that authors should be given distribution rights for their work regardless of the media used to store that work
- it creates the right to interactive availability, which is part of the right of public communication and would enable users to access intellectual property works at any time and from any source, including wireless devices
- it includes a provision on the introduction of the so-called ‘digital levy’ which adds a fixed charge (it is paid by the buyers and depends on the price of the product) to the purchase of digital products and devices (CDs, DVDs, MP3 devices, mobile telephones, portable USB flash memory devices, scanners and printers); it specifically establishes that the levies are to be collected and distributed to authors as compensation for the creation of private copies by end-users using these kinds of products

- it stipulates that copyright societies have to set up welfare and support services for “authors, performing artists or cultural workers”, either by themselves or through third parties (20 per cent of societies copyright fees must be spent on such services)
- it clarifies that the concept of private copies only covers those copies that are made by end-users for private purposes.

Sources: Burgos, C. (2006) Spain: Update to IP Laws Includes Introduction of Digital Levy. World Intellectual Property Report. 20(09); WIPO website (www.wipo.org)

11 Other policies

In this section we discuss policies that do not fit in the other categories but that should not be neglected in the present study, such as international cooperation and fiscal policies with other objectives than mentioned before.

International cooperation

A very interesting development is the international collaboration in the Nordic Region. The Nordic collaboration in the field of culture and creative industries is unique in the world. It might be a strategy that could also be beneficial for other EU-member states.

Box 11.1: The Nordic Culture Point: cultural co-operation in the Nordic countries

Two organisations have been created to channel the official Nordic co-operation within the Nordic region (Denmark, Finland, Iceland, Norway and Sweden and three autonomous territories represented by the Faroe Islands, Greenland and Åland) and outside (Russia, Belarus, Estonia, Latvia and Lithuania, Poland, Germany, Artic-West Nordic Region, Balkans-South East Europe): the Nordic Council and the Nordic Council of Ministers. The Nordic Council, formed in 1952, is the forum for Nordic parliamentary co-operation in legal, cultural, social and financial fields. The Nordic Council of Ministers, established in 1971, is the forum for Nordic governmental cooperation. The Culture, Education, and Training Committee deals with issues regarding culture, education, training, and research. In 2007 a new contact point for Nordic cultural co-operation has been set up: the Nordic Culture Point. The Nordic Culture Point will primarily take responsibility for providing information and consultancy to cultural figures, acting as a service function and serving as a secretariat for the framework programmes of the Nordic Ministries of Culture, as well as for coordinating the activities of the Nordic cultural forums. The programmes not only deal with traditional arts but also with the new creative industries. The main scope of the programmes is to leverage arts and the media sector through a sustainable cultural co-operation among the Nordic countries. Initiatives are either in the form of grants, funds or in consultancy and assistance.

Three main areas of intervention have been set up:

- Nordic Computer Game Programme: the programme aims to stimulate the Nordic computer game industry
- Mobility and Residential Programme: the programme focuses on strengthening the cultural sector through increasing the mobility for artists and cultural players, network building and artists in residence
- Programme for Nordic Art and Cultural Co-operation: it focuses on activities aimed at production and teaching as well as development of competencies, criticism and the sharing of knowledge. Development work will the crucial criterion for all projects.

Source: NORDEN website (www.norden.org); Nordic cultural Point website (www.kulturkontaktnord.org)

In Asia several co-operation initiatives have been developed. In 2005 the *Asia Film Academy (AFA)* and the *Asian Film Network (AFIN)* were created to increase cooperation and further development of the Asian film industry. In Singapore, the Infocomm Development Authority (IDA) launched the *Games Exchange Alliance*. This is a Singapore Inc. network of enterprises which helps game companies to increase market access in Asia. It has members in over 13 Asian countries including games developers, publishers and service providers.

Box 11.2 The Asia Film Academy (AFA) and the Asian Film Network (AFIN)

In 2005, the Asia Film Academy (AFA) was launched in 2005 by the Korean Academy of Film Arts (KAFA), the Busan International Film Festival and Dongseo University to promote the creation of the Asian Film Network (AFIN) and the development of the Asian film industry. It is the first project to cultivate Asian filmmakers. Young filmmakers who are selected from across the Asian regions can receive high quality film training for three weeks, including time spent during the Pusan International Film Festival period with diverse workshops in Busan. The Asian Film Network (AFIN) was launched in 2005 at the Pusan International Film Festival with Korea, Japan, Vietnam and Thailand as founding member nations, and China and Singapore as observers. Led by the Korean Film Council (KOFIC), the organization aims to promote Asian films through co- promotion activities at international film festivals and markets, sharing film related research and data, and facilitating international co-productions. KOFIC, UniJapan, the Federation of National Film Associations of Thailand, and the Vietnam Media Corporation are the founding members.

Sources: KOFIC website (www.koreanfilm.or.kr)

Other fiscal policies

Other fiscal policies concern tax exemptions and reductions for creative industries meeting certain criteria, special fiscal regimes and subsidies for objectives other than the ones mentioned in the previous sections. In general, all countries are developing policies to facilitate and improve the private support to the arts, through tax deductions and tax credits schemes for donations, encouraging the creation of foundations (e.g. Italian Foundations of Banking Origin) or increasing the fundraising culture within cultural institutions and the cultural philanthropy (e.g. the Dutch Cultural Philanthropy Programme, the Partnerships Programme of the Singapore National Arts Council)[24]. As far as tax credits and tax incentives are concerned, the majority of them can be found in the film industry.

[24] For a comprehensive overview of the financing system to the arts in Europe in the period 2000-2005, please refer to Klamer, A., Petrova, L. and A. Mignosa (2006) *Financing the Arts and Culture in European Union*. Brussels: European Parliament.

Table 11.1: Some examples of tax incentives and schemes in the film industry

Australia	Tax Incentives under Division 10BA and 10B (by Income Tax Assessment Act 1936) / Tax concession (by FLICs -The Film Licensed Investment Company scheme)
Canada	Canadian Film or Video Production Tax Credit / Film or Video Production Services Tax Credit (by Canadian Audio-Visual Certification Office-CAVCO and Canada Revenue Agency-CRA)
Canada - British Columbia	Tax Credits (Film Incentives and Production Services) (by British Columbia Film Society)
Canada - Ontario	Ontario Film and Television Tax Credit / Ontario Production Services Tax Credit (by the Ontario Media Development Corporation-OMDC and the Ministry of Finance)
France	Cinema tax relief measures (by Société pour le Financement du Cinéma et de l'Audiovisuelle - SOFICA and Institut pour le Financement du Cinéma et des Industries Culturelles - IFCIC)
New Zealand	Income tax treatment (special deductions of expenditure incurred in acquiring film rights once the film is completed and of film production expenditure once the film is completed) (by Income Tax Act 2004) / Large Budget Screen production Grant (12% rebate on production expenditure in New Zealand) (New Zealand Film Commission)

In order to increase the long-term sustainability and viability of several art disciplines, specific funding opportunities have been developed by Arts NSW, part of the New South Wales (Australia) Department of the Arts, Sport and Recreation. In particular dance and theatre can apply for funding for new *Strategic Initiatives* which have demonstrable long-term results for the development of the arts industry in New South Wales. A maximum of up to $40,000 per annum will be granted. Existing staff costs, travel costs and capital requests are ineligible. Priority is given to initiatives in the areas of audience development, business development, employment opportunities, new technology applications and national or international partnerships. A further *Triennial Funding* may be offered to selected outstanding organisations at the discretion of the Ministry for the Arts. The Triennial Funding provides funding to key organisations to develop a viable and strategic infrastructure to advance their artistic discipline in New South Wales. Applicants must have a substantial record of achievement and be able to demonstrate that they have enriched their specific artistic discipline in New South Wales both by their work and by the role they have played in fostering new artists, new ideas or new ways of working. Organisations will be required to submit high-quality, well-developed three-year programs of activities, together with effective and viable three-year management plans.

12 Final conclusions and remarks

The quick scan has presented a selection of interesting policies that could be an impulse to the debate on creative industries both in the Netherlands and the European Union. It has reviewed trends, developments and examples in various types of economic policies: innovation, entrepreneurship, access to venture capital, (international) market development, creative clusters, intellectual property rights and other policies. In addition, the quick scan has discussed general trends in national policies for creative industries. The executive summary (enclosed in the report) covers the main points in this quick scan. The most important observation is that national policies for creative industries tend to serve both economic and cultural objectives. It is no surprise that partnerships and collaboration is a recurrent theme in the different policy categories. The combination of objectives is also a potential source of tension between two very different policy fields. The idea that culture can be seen as the stimulus of innovation for creative industries and other industries, challenges both economic and cultural policymakers. This reasoning is not commonly accepted among economic and cultural policymakers but making the most of the economic potential of culture implies a change of attitude. The many examples in the quick scan give food for thought.

Finally, what are the lessons from the research for countries that want to set up a national policy scheme to stimulate creative industries? The quick scan does not provide a standard recipe but the examples have certainly raised many questions about the applicability for nations that are exploring their possibilities. It is difficult to translate the findings of this quick scan into a set of do's and don'ts. The applicability depends very much on the cultural, economic and administrative context. The reader can conclude from the quick scan that each country that aspires to develop such policies needs to answer critical questions such as:

- What is the economic impact of creative industries and what are key strengths of creative industries?
- What are crucial elements in a national strategic framework for creative industries?
- What is to be preferred: a generic economic policy with the assumption that it caters for the creative industries versus special policy schemes for creative industries or its sub-sectors?
- What sub-sectors should be prioritised?
- How to integrate explicit policies for (parts of) creative industries in both mainstream economic policies and cultural policies?
- What is the best way to deliver these policies?
- How to evaluate these policies aiming for economic and cultural objectives?

There are no clear-cut answers to these questions as explicit policies for creative industries are a relatively new phenomenon. However, the questions stimulate the national debate on creative industries and it could also energise the exchange of experiences on the European level.

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Annex

Table A.1: Summary of the research approach

	Motives, instruments, objectives and results?	Creation and production?	Distribution and retail?	Arts?	Entertainment and media?	Creative business services?	Direct intervention by national government?	National government stimulating local government to intervene?	Generic policies?
Innovation policies									
Entrepreneurial skills policies									
Access to venture capital									
(Inter)national market development									
Creative clusters policies									
Intellectual property rights policies									
Other policies									