

**EUROPEAN  
EXPERT  
NETWORK  
ON CULTURE  
(EENC)**

***Mapping of Cultural and Creative Industry  
Export and Internationalisation Strategies  
in EU Member States***

**by Judith Staines and Colin Mercer**

EENC Report, October 2012

This document has been prepared by Judith Staines and Colin Mercer on behalf of the European Expert Network on Culture (EENC). Research support was provided by Jordi Baltà (Interarts).

The EENC was set up in 2010 at the initiative of Directorate-General for Education and Culture of the European Commission (DG EAC), with the aim of contributing to the improvement of policy development in Europe. It provides advice and support to DG EAC in the analysis of cultural policies and their implications at national, regional and European levels. The EENC involves 17 independent experts and is coordinated by Interarts and Culture Action Europe. For additional information see [www.eenc.eu](http://www.eenc.eu).

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## Contents

	<i>Page</i>
<b><i>Executive Summary</i></b>	<b>4</b>
<b><i>1. Introduction: background and methodology</i></b>	<b>8</b>
1.1. Focus of the research and definitions	8
1.2. Background	9
1.3. Methodology	14
1.4. Challenges in the mapping	15
<b><i>2. Trends in CCI export and internationalisation</i></b>	<b>16</b>
2.1. Studies and findings: UNESCO	18
2.2. Studies and findings: UNCTAD/UNDP	19
2.3. Studies and findings: EUROSTAT	28
2.4. Priority markets for EU Member States: sectors	31
2.5. Priority markets for EU Member States: geographical	34
<b><i>3. Strategies in CCI export and internationalisation</i></b>	<b>38</b>
3.1. European initiatives	38
3.2. Regional cultural export strategies	39
3.3. National cultural export strategies: all CCI sectors	40
3.4. National cultural export strategies: specific sectors	41
3.5. Sub-national cultural export strategies (cities and regions)	42
3.6. Trade and industry support measures	43
3.7. Business support programmes for CCIs	43
3.8. International promotion by sector-specific bodies	43
3.9. Grants for trade fairs, showcases and other promotion activity	44
3.10. Export finance measures	45
3.11. Word event promotions & nation branding	45
<b><i>4. Summary and Recommendations</i></b>	<b>46</b>
4.1. Summary contextualising the analysis	46
4.2. Recommendations	50
<b><i>5. Bibliography</i></b>	<b>53</b>
 <b><i>Annex 1: CCI export and internationalisation bodies</i></b>	 <b>79</b>
<b><i>Annex 2: CCI trade promotion events</i></b>	<b>111</b>
<b><i>Contributors</i></b>	<b>117</b>

## **Executive Summary**

The *Mapping of CCI Export and Internationalisation Strategies in EU Member States* provides a commented mapping of strategies and policy to support the export and internationalisation of the Cultural and Creative Industries (CCIs) in the European Union.

The report was commissioned by the Directorate General for Education and Culture of the European Commission (DG EAC) from the European Expert Network on Culture (EENC) to inform the first meeting of the OMC Working Group on CCI export and internationalisation strategies in December 2012. Cultural policy researcher Judith Staines, with input from EENC expert Colin Mercer, undertook the mapping research in September 2012 and made an analysis of strategies, trends and export volumes. The report was finalised through a joint editorial process, involving a review and contribution by Jordi Baltà (EENC) in October 2012.

The study presents the first in depth examination of this field across EU Member States (EU MS). The research identified nearly 200 bodies (Annex 1) involved in the export and internationalisation strategies of CCIs, covering all EU MS with a more detailed analysis in around half of the countries surveyed. The organisations involved in CCI export and internationalisation were extremely numerous and a comprehensive listing was beyond the scope of this short report. The bodies cover governmental, NGO, private and commercial organisations in the arts, culture and media sectors, trade and industry, international relations, employment, business policy, entrepreneurship and innovation fields. Organisations identified were operating at international, regional, European, national, sub-regional/federal and city levels.

A listing of around 50 major trade events worldwide seen as important vectors for export promotion by European organisations in the various CCI sectors is presented in Annex 2.

A commented Bibliography of relevant literature is provided in Chapter 5, listing some 100 publications, policy documents, evaluation reports and other documents from the past five years on the subject. The study examines the wider EU policy and strategic context for the research, notably the *2000 Lisbon Strategy*, 2006 KEA Report for the EC *The Economy of Culture in Europe*, 2007 *European Agenda for Culture*, 2010 EC Green Paper *Unlocking the Potential of Cultural and Creative Industries* and discussions and papers around the proposed *Creative Europe Programme 2014-2020*.

The study places the theme of export and internationalisation strategies for CCIs at the intersection of a number of evolving trends and interests in Europe. There is a growing recognition of the value and potential of the 'creative economy' which is bringing non-profit arts and cultural organisations, creative businesses, commercial producers and distributors of creative content and related intellectual property rights within a shared creative 'ecosystem'. The process of engaging with the export and international potential of the CCIs

is simultaneously galvanised and challenged by globalisation and digitisation, by a speeding up of external economic forces and fast-evolving consumption and communication habits that disregard slower policy and planning timeframes, by shifting patterns in the economic realities of so-called developed, developing and transitional markets worldwide.

Analysis of the trends in CCI export and internationalisation relies on accurate, comparable statistical data. The study found that the main international bodies involved in such work (UNESCO, UNCTAD/UNDP and Eurostat) all provide extensive evidence for the growth in international flows of cultural goods and services over recent years, for increases in cultural exports against other traded goods. However, the studies adopt different methods of classification and it proved difficult to undertake cross-comparisons as a result. The bodies involved in such work all acknowledge the challenges, regularly revise their statistical methodologies, and identify particular problems in tracking the export flows of IP and other 'invisibles' in the cultural services area, and for certain cultural goods (e.g. art and antiques) that may pass 'under the radar' through private sales and other transaction methods.

The main findings of the UNCTAD/UNDP *Creative Economy Report 2010* of relevance to this study are that creative goods exports account for the vast majority of world trade of CCIs (69% creative goods in 2008, against 31% for creative services). Design is the largest sub-sector for creative goods exports (60% in 2008). Nine EU MS were in the top 20 exporters of creative goods worldwide and six EU MS feature in the top ten developed economies list. In 2008, Germany was the top developed economy exporter of both Performing Arts and Publishing & Printed Media; Italy was the top developed economy exporter of Design and the UK, France and Germany featured in the top five exporters of Visual Arts. Creative goods exports from the EU in 2010 represented 36% of the total value of creative goods exports worldwide, a small decrease since 2008 when they took 40% of total value.

The Eurostat *Cultural Statistics* report in 2011 found that in 2009 the EU-27 exported more cultural goods to the rest of the world than it imported, recording a trade surplus of around €1.9 billion. The main products exported were books, works of art, antiques, newspapers and DVDs.

The mapping of organisations, documents and events provided the evidence for a close analysis of current policy and practice in CCI export and internationalisation strategies across EU MS. The study finds a considerable and varied range of activity: EU MS are at very different 'speeds' in terms of their engagement with the well-documented export growth rates and potential of the CCIs. The regional strategic engagement of Nordic agencies in developing support for the growth of cultural industries and the export/international presentation of a distinctive Nordic 'brand' offers a strong example of regional policy and the value of working across national borders in this field.

Priority sector markets for EU MS can be identified by different methodologies. The mapping showed that there are a significant number of organisations, often with public sector

investment, in the export and international presentation of certain CCI sectors, with some common patterns across EU MS. This is found particularly in the fields of film/audiovisual content and books/publishing where most EU MS recognise and support sectors that are both intrinsically dependent on international distribution. Design is also seen as a priority sector for investment in many EU MS, resulting from the exportability of design products and services, the huge market potential worldwide and the intangible capacity of design to build image and convey values of a country, city, people and culture. Music is also a prominent sector for export support strategies, particularly in the Nordic and northern European countries.

The examination of geographical priority markets for EU MS produced an extremely diverse scattering of countries, cities and global regions. The priority markets are frequently different for the different CCI sectors, both within one country and when compared with each other. The research was not able to uncover the reasons for this diversity, beyond the sheer numbers of bodies involved in CCI export, each seemingly pursuing their own strategies and market research with little national policy coordination. Notable was the interesting analysis undertaken in the Netherlands which compared cultural export volumes with volumes of general exports and identified some geographical market patterns. Indications from the Netherlands and several other countries show that, in spite of the hype around distant booming markets in Asia and Latin America, the ease of trading within the EU internal market means that the strongest and most accessible markets for CCI goods and services exports are often intra-EU, frequently with neighbouring countries.

Strategies in CCI export and internationalisation are examined in Chapter 3, ranging from European and region-wide initiatives (notably the Nordic programmes) to national strategies (Finland's Programme for Cultural Export Promotion 2007-2011 is well documented, thoroughly evaluated and presents an important example of a proactive strategy reaching all CCI sectors, both profit-oriented and non-profit, and involving an intensification of strategic and practical cooperation between the relevant ministries). Cultural export strategies for specific sub-sectors are examined: e.g. the DutchDFA programme for design, fashion and architecture 2009-2012, focused on India, China, Turkey and Germany and Denmark's new Design Policy which is currently spearheading national innovation strategy and has evolved over several years. Sub-regional strategies operating in cities and regions of Spain, Germany and Austria are presented, as well as other programmes for international promotion, export finance initiatives which support CCIs and world event/nation branding exercises.

In summary, the report comments on the lack of attention paid to the importance of CCI export markets in many of the cultural and creative industries strategic documents and studies commissioned or published by the European Commission in recent years. It identifies and quotes some notable exceptions to this, but states that the existing quantitative and qualitative knowledge and evidence base on EU CCI exports and trends needs a lot of development to be sufficiently robust to inform policy for appropriate intervention and

support. There is a need for a new, more nuanced approach to the sector's distinctive features, recognising the CCIs as *traded industries*, with higher productivity, higher patenting rates (and IP renewability) and higher wages than some other traditional industries.

The *Mapping of CCI Export and Internationalisation Strategies* identifies Three Key Action Areas for the OMC Working Group, for an exchange of policies and practices and to take forward the work of this report. These are:

- Identify, promote and distribute best practice
- Define the field of action and build the knowledge and evidence base for CCI exports
- A joined-up, evidence-based policy and investment for CCI export development

Each of these Key Action Areas presents core recommendations and auxiliary actions, involving further investigation and analysis. Improvements in the coordination and harmonisation of statistics for CCI exports are recommended, along with a consolidation of the definition and usage of 'cultural and creative industries' terminology. Recommendations for a more joined-up, synergistic policy and programme budgeting architecture for CCI exports would help CCIs across the EU face the challenges of digitisation and globalisation more effectively.

The findings of the study and its recommendations are to be presented by Judith Staines to the first meeting of the OMC Working Group on CCI export and internationalisation strategies in December 2012.

## **1. Introduction: background and methodology**

In July 2012, the Directorate General for Education and Culture of the European Commission (DG EAC) submitted a request for an expert contribution on behalf of the European Expert Network on Culture (EENC) to the first meeting of the OMC Working Group on CCI export and internationalisation strategies, to be held in December 2012.

The Working Group, set up in the context of the Council Work Plan for Culture 2011-2014: Priority Area B on the Cultural and Creative Industries (CCI), will aim to discuss and exchange policy practice on 'CCI export and internationalisation strategies', ultimately leading to the production of a good practice manual.

The EENC was asked to produce a commented mapping of strategies existing in EU Member States to support the export and internationalisation of the CCIs, as well as contextual data on trends and export volumes and a final analysis of the evidence presented. The report should present recommendations for the areas in which an exchange on policies and practices could be most relevant.

### **1.1. Focus of the research and definitions**

For the purposes of this mapping, and the context in which it will be used, the definition of *CCI export and internationalisation* was taken as:

- International trade of CCI goods<sup>1</sup>
- International trade of CCI services<sup>2</sup>
- Measures to develop the international capacity of CCI companies<sup>3</sup>

The essential focus of the mapping is therefore international flows in CCI goods and services involving sales (goods, services, rights and other IP) that would register in an economic analysis of a country's trade balance.

The request from DG EAC was for the mapping to cover the following CCIs: **architecture, audiovisual** (including film, radio, television, video games and multimedia), **cultural heritage related services, design, music, performing arts, publishing and visual arts**.

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<sup>1</sup> Sales and distribution outside the EU Member State deemed to be the 'home' production and/or creation point for the goods (normally where the company producing the goods is registered)

<sup>2</sup> Sales and distribution outside the EU Member State deemed to be the 'home' source of the services (normally where the company producing the services is registered)

<sup>3</sup> Their capacity to trade internationally; to source materials, partners and manufacturing capacity abroad; to promote their goods and services in an international context.



With the availability of many other studies, and the work by previous OMC Working Groups on various aspects of internationalisation in the cultural field, it was decided that a number of areas of international cultural activity were not central to this research. In particular, the fields of international cultural exchange, cultural mobility, cultural dialogue, cultural diversity, cultural diplomacy and the mobility of museum collections were seen as having been extensively reviewed elsewhere and are not dealt with in detail.

Several other areas were also *excluded* from this study, although they are certainly important aspects of international trade involving CCIs:

- Cultural tourism<sup>4</sup>
- Inward investment<sup>5</sup>
- Regulations controlling the export of cultural heritage<sup>6</sup>

## **1.2. Background**

### **1.2.1 The wider policy and strategic context**

The wider policy and strategic context for the report is given by the increasing recognition of the importance and relevance of the CCIs to smart, sustainable and inclusive growth within the EU as recognised and documented by, among other documents:

- The 2000 *Lisbon Strategy* and related publications and actions relating to employment growth, the knowledge economy, innovation and digitisation.
- The 2006 KEA report for the European Commission *The Economy of Culture in Europe*
- The 2007 *European Agenda for Culture* and related documentation and actions
- The 2010 EC Green Paper *Unlocking the Potential of Cultural and Creative Industries*
- Subsequent discussions and documentation by the European Commission, the European Parliament and stakeholder CCI organisations in the lead up to the discussions and budget decisions within the Multi-annual Financial Framework on the proposed *Creative Europe Programme 2014-2020*.

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<sup>4</sup> Although many examples show that the promotion of a country abroad through cultural export initiatives is often aimed at sensitising overseas markets to cultural tourism opportunities.

<sup>5</sup> Some references are included to agencies responsible for promoting their country/region/city as a film location, thus securing international investment, employment of CCI workers and the opportunity to promote the image of the country abroad. E.g. films depicting the UK have been found responsible for generating around 10% of overseas tourism revenues.

<sup>6</sup> Such laws monitor and control the movement and sales of valuable cultural heritage objects within the antiques trade and auction house business, as well as private sales. They are also involved in the (largely non-commercial) movement of museum collection objects for exhibition abroad.

As a result of this new policy focus on the CCI sectors, a lot more is now known about them, both quantitatively and qualitatively.

*Quantitatively* we know, for example, that the CCI sector as a whole:

- has a sector value of €560 billion in value added to GDP on 2008 figures representing 4.5% of EU GDP and employing 3.8% of the EU workforce (TERA Consultants, 2010, p.6 and cited in European Commission, 2011b, p.9)
- experienced significant growth of 20% over the 1999-2003 period which is 12.3% higher than the general economy (KEA, 2006)
- makes a GDP contribution greater than the chemicals and plastic products industry (2.3%) or real estate activities (2.1%) (Working Group of Member States Experts OMC, 2012, p.6)
- demonstrated clear growth and/or stability trends especially in the context of globalisation and the digitisation of distinctive cultural content reaching new markets and developing new audiences for the diverse cultural offer of the EU at a global level (European Parliament, 2012)

*Qualitatively*, the evidence is also mounting that the CCI sector also makes significant contributions to contiguous EU policy objectives, and to current and proposed initiatives in the areas of:

- ‘Spillover effects’ of innovation and creativity into other industry sectors, especially those closely related to a knowledge economy
- Social cohesion and inclusion agendas
- Regional agendas, especially in the context of *Smart Specialisation Strategies* (S3)
- The general global context of the ‘digital shift’ and the specific context of the *Digital Agenda for Europe* in which it has been recognised that digitisation is massively transforming the value chains of the CCI sector from the point of creation, production and distribution of cultural content, through to the development of new business models, marketing and retail strategies (the ‘long tail’ effect<sup>7</sup>) and new modalities of engagement with and consumption of cultural product including interactive ‘prosumption’<sup>8</sup> in a ‘many-to-many’<sup>9</sup> environment of cultural transmission on new social media platforms with new portable devices
- The *EU 2020* goal of *Smart, Sustainable, Inclusive Growth*

<sup>7</sup> Referring to the entirely new digital retailing and purchase environment for cultural content created by organisations such as amazon.com, iTunes, etc.

<sup>8</sup> Referring to the tendency for the roles of producer and consumer of cultural product to merge in the digital interactive environment as in, for example, Massive Multiplayer Online Games (MMOGs) where the consumers of the product also contribute towards its design and redesign.

<sup>9</sup> As distinct from the ‘one to many’ model of traditional broadcast media and other audiovisual content.

In this context, cultural and creative exports can play a vital role of '*import-substitution or import-replacing*'.<sup>10</sup> In a global cultural marketplace long dominated by just three or four national net exporters of cultural content and product (USA, UK, Italy, Germany – and most recently China), with a very small number of very large companies, and a very large number of very small companies, developing this capacity within the European Union in a coherent and co-ordinated way will be crucial to the sustainability of the CCI sector in a culturally diverse Europe.

This context and these circumstances require a strategic approach to the entire value chain from the point of creation through to new market and audience development and, in the context of a linguistically and culturally diverse Europe, a special emphasis on new and innovative export strategies in circumstances where the bordered 'market place' has now become a *market space*.

### 1.2.2 The present context

The theme of export and internationalisation strategies for the CCIs lies at the intersection of a number of evolving interests and trends in Europe and globally, with different levels of visibility, perceived importance and implementation across the EU Member States in the context of:

- Increased recognition and knowledge of the economic value of the cultural and creative industries (CCIs), with their corresponding higher policy profile in the context of both current and proposed EU programmes in terms of export revenues and potential for growth; this is placed alongside the global recognition of a 'creative economy' which is rapidly expanding in new ways in the context of both digitisation and globalisation.
- Increased integration of CCIs (SMEs and micro-enterprises) within foreign trade initiatives (export strategies, advisory services, trade missions) formerly addressed to more traditional, larger-scale economic sectors.
- The inclusion of arts and culture within a wider CCI strategic policy overview and 'ecosystem', leading to some convergences between traditional models of international cultural exchange and CCI export and internationalisation strategies, particularly in the context of digitisation and new platforms for creation, production, distribution and consumption of cultural content and offer.
- The substantial experience of some CCI sub-sectors (e.g. film, publishing), where international promotion and distribution has always been a core activity for both economic and cultural objectives.

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<sup>10</sup> As the economist Jane Jacobs puts it, specifically in the context of cities and city-regions: '[e]conomic life develops by grace of innovating: it expands by grace of import-replacing.' (Jacobs, 1986:39)

- Creative cities and city-regions: the strategic positioning of cities and city-regions in Europe through their cultural attractiveness and by measures to support cultural entrepreneurship (including export) to boost a city's or a city-region's economic vitality. In the context of digitisation and globalisation, incentives are promoted to 'build local, go global'.
- Creative clusters and hubs: urban and regional planning initiatives to concentrate CCI businesses, and sub-sectors, to maximise synergies, networking and economic growth.
- Multilateral approaches where several countries collaborate on joint CCI export/internationalisation strategies (e.g. Nordic initiatives).
- Proposed and current strategies in areas such as Smart Specialisation Strategies (S3) at regional level.

The Lisbon Strategy for growth and employment, the European Agenda for Culture, economic shifts in terms of developing, emerging and struggling markets, digitisation, globalisation and the rise of the creative economy are among the factors generating both opportunities and demands for the CCIs in EU Member States to improve their export and internationalisation performance and raise their contribution to GDP. At the same time, a different political and cultural agenda in Europe engages in a debate on how culture and creative industries can look beyond markets in order to foster cultural diplomacy and cultural relations in the EU's external affairs at a time of change across Europe. The European Commission and EU Member States party to the *UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions* have obligations in terms of the production and distribution of cultural goods and services<sup>11</sup>.

The agenda on the creative economy and sustainable development takes several forms and, again, generates polarities of debate. There is a demand from some for shorter chains of production, distribution and consumption, the 'slow' movement, a trend towards the 'Made Here', locally produced sustainable creative goods and services. Sustainable creative cities are analysing and improving their patterns of production, distribution and consumption across all types of services and activities including the cultural and creative sectors. Slow and sustainable modes of mobility are becoming a factor in international arts touring and arts festivals. The creative ecology or 'ecosystem' are seen as strategic components of 'smart, sustainable, inclusive growth' in the context of the proposed 2014-2020 Creative Europe

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<sup>11</sup> E.g. **Article 16 – Preferential treatment for developing countries**

Developed countries shall facilitate cultural exchanges with developing countries by granting, through the appropriate institutional and legal frameworks, preferential treatment to artists and other cultural professionals and practitioners, as well as cultural goods and services from developing countries.

single framework programme and Smart Specialisation Strategies' (S3) on regional agendas.

Thus, the export and internationalisation of CCIs has many champions in Europe, often with different objectives in sight. Balancing the different agendas and acquiring a clear understanding of the potential achievements of cultural export strategies is an important challenge for policy-makers and business support agencies.

In summary we can cite two recent documents from the European Commission and the European Parliament in order to emphasise simultaneously:

- (i) the strategic nature of the CCI sectors in relation to wider EU strategies and initiatives
- (ii) the complex 'ecosystem' of the CCI sector requiring special consideration for policy development in the field of exports
- (iii) the expanding and distinctively digital nature of the expanding global *creative economy*

The EC's September 2012 *Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Promoting cultural and creative sectors for growth and jobs in the EU* notes in the subtitle that the CCI sector is a 'largely untapped resource for the *EU 2020 Strategy*' and, specifically in relation to exports:

- 'The challenge is both to increase exports to the benefits of EU's economy, and forge a dynamic image of an attractive and creative Europe open to cultures and talents from across the world.' (pp.3-4)
- 'Smart internationalisation and export promotion policies are needed to allow a wide majority of small organisations and companies to operate in a global environment and reach new audiences and markets worldwide. It is necessary to identify the most effective support services, facilitate access to foreign markets, reinforce regulatory dialogues and assess possible risk sharing facilities. Pooling of resources and increased cooperation between various actors in the EU could be further explored to promote a stronger cultural and creative presence of Europe on the world scene and an attractive European image bridging our excellence in the field of heritage to vibrant cutting edge creativity.' (p.6)
- That the Expert Group examining 'the use of Cohesion Policy Funds to foster the potential of culture for local, regional and national development, in particular by contributing to smart specialisation strategies... will now focus on internationalisation and export strategies.' (p.8)

This is in the context of the major challenges, especially in the field of exports:

‘...brought about by globalisation and the digital shift [where] the necessary adaptations are yet to be promoted to allow these sectors to realise their full potential and Europe's long-standing excellence to be better valorised as a comparative advantage on the world scene.’ (p.2)

In a similar vein, the European Parliament's September 2012 Detailed Briefing Note on *The Culture Strand of the Creative Europe Programme* suggests that the European Parliament:

‘...may ... wish to take the opportunity to open a more fundamental debate about the nature of the creative economy/creative ecosystem and its implications for future smart, sustainable, inclusive growth in the Union and the Member States and a distinctive and competitive position for the EU in a globalised and digitised world which poses many threats both to European identities and to European markets but also many new opportunities for them’ (European Parliament, 2012:39)

The same note also cites the 2011 EC *Green Paper on Online Distribution of Audiovisual Works in the EU* which points out that ‘...digital technology and the internet are rapidly changing the way in which content is produced, marketed and distributed to consumers... The traditional value chains are in flux and business models are evolving to meet consumer expectations.’ (European Parliament 2012:35).

It is probably fair to say that digital social media platforms like *Facebook* – which recently passed its billionth member – *Twitter*, *Pinterest*, *Google+*, *Tumblr*, and the rest, combined with the exponential growth in the ownership and use of portable devices – pods, pads, phones, tablets, readers – are the greatest demand stimulant ever experienced for cultural and creative product and content. Untroubled by borders, customs authorities and trade quotas as this environment is, it is equally fair to say that it also provides great new incentives and opportunities for strategic and co-ordinated export strategies appropriate to the digital age.

As the second largest exporter of cultural content and product in the world, the EU is currently well-positioned to exploit these new opportunities in a co-ordinated and strategic way.

We address the implications of these significant tectonic shifts in the cultural landscape in Chapter 4, summarising the context analysis and presenting recommendations.

### **1.3. Methodology**

The main research for this report was undertaken by Judith Staines in August/September 2012. Data was collected through stakeholder and network mapping, document analysis, expert consultation and targeted email requests. A request for relevant information was circulated among the EENC expert network, to ERICarts, IFACCA, the U40 network of young experts in the field of cultural diversity and a number of cultural policy researchers across Europe.



Additional material was provided by Colin Mercer and Jordi Baltà and, combined with input from several EENC network members, the researcher drew up a draft report based on the findings. Colin Mercer then reviewed the content and documentation, integrated additional information and drew up the Recommendations. Judith Staines wrote the Executive Summary and the report was finalised in October 2012 through a collaborative review process by Judith Staines, Colin Mercer and Jordi Baltà.

#### **1.4. Challenges in the mapping**

The main challenge encountered in the research was the huge volume of available information and the extraordinary number of bodies in EU Member States responsible for and involved in CCI export and internationalisation. Within the scope of the research for this short briefing paper, it was not possible to access all the material and identify all responsible bodies. Nevertheless the mapping presents a substantial advance in the understanding of the main issues in policy and practice for CCI export and internationalisation in EU MS.

There are many existing studies into the economy and economic potential of the CCIs in Europe. However, few to date have paid much attention to the international dimension and export performance. This demonstrates the need and pertinent timing for an OMC Working Group to focus on this issue. An in-depth review and wide dissemination of the issues should help raise awareness among researchers and policy makers of the need to incorporate export and internationalisation strategies into future CCI research.

The main evidence on export flows of cultural and creative goods and services comes from a small number of international studies. A substantial amount of work by various international bodies with extensive research resources has gone into the analysis of international trade in cultural goods; the studies reviewed for this mapping present a large amount of data with convincing evidence of the value and potential for cultural exports. However, it is also true that the analysis is only as good as the most recent study since each edition seems to involve a revision of the statistical basis and uncovers new 'grey areas' where the data may be incomplete for various reasons.

Comparisons across international studies were hampered by the use of different bases for the data even within the UN System of National Accounts (SNA) framework. This is a challenge for national governments identifying the baseline for and evaluation of cultural export strategies. It is also a salient issue for the EC and other international agencies working within the UN/SNA context in moving towards harmonisation of data in a rapidly changing global and digital context, where 'invisible' and 'intangible' exports and value-added in IP and service domains are rapidly becoming more significant than tangible exports, especially in the CCI sector.

Information on specific measures to support export is frequently only published in the national language. It is common to find an export-oriented website with a small amount of international information in English, often focused on inward investment opportunities in the particular country or city, within an extensive web portal in the national language with a vast array of export and internationalisation grants, advice and support available to CCIs in that country. The already strong multilingual capacities of the research team were stretched, given the short research period, and yet more relevant content may still be uncovered.

In terms of the CCI sectors which DG EAC requested, far less information was found for the area of cultural heritage related services<sup>12</sup> than for other CCI sectors. Commercial information on the export value of loans of museum objects may be available through more in-depth research. The international sharing of expertise and services in archaeology, heritage conservation and restoration is – for many EU Member States – part of their international development and foreign aid programmes rather than a target export sector. Again, further in-depth research may uncover the export values of this field.

In the audiovisual field, there was substantial information available for the export and internationalisation of film, as well as some for computer games. Broadcasting data (radio, television, online broadcast platforms) are included in statistical surveys reviewed for the research but it was found that the internationalisation issues and export performance of this large and complex CCI sector are extensively documented elsewhere. Given the short research contract for this mapping, it was therefore felt that efforts were better directed at less visible CCI sectors. Therefore, sector bodies and related bibliography for broadcasting are less well represented in this mapping than other CCI sectors.

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<sup>12</sup> See under France in the Bibliography for the bilateral agreement between France and the United Arab Emirates on the Universal Museum [Louvre Abu Dhabi project].



## **2. Trends in CCI export and internationalisation**

Analysis of trends in the export and internationalisation of CCI goods and services from EU Member States relies on accurate, comparable statistical data. The understanding of the flows in international cultural trade has advanced considerably over the past ten years, in particular due to the work of the UNESCO Institute for Statistics, the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Development Programme (UNDP), and through Eurostat.

Global trends in the international trade of cultural goods and services are emerging. It is notable that there are different approaches to the categorisation and market segmentation of the CCIs making it difficult to make meaningful comparisons across the various studies. Nevertheless, each study overhauls the methodology adopted in previous exercises and there is a continuous improvement in the data available.

In depth data collection and analysis has also been carried out in particular sub-sectors, for example in the cinema and audiovisual fields by the European Audiovisual Observatory. Global and world region sector reports are also available in the publishing, media and entertainment fields, mostly carried out by commercial trade bodies.

At the national and sub-national levels in Europe, the availability of statistical data and analysis is extremely variable. Some EU MS publish up to date annual surveys of the CCI sector which include national cultural export statistics, while many others have, as yet, paid little attention to the international trade element of CCI activity. Indeed, basic research into the 'export of cultural goods in Europe' uncovers more references to national legislation controlling the movement of cultural heritage objects (a peripheral aspect of this research) than to international trade in the contemporary production and services of CCI businesses.

Most studies published to date into the economy of the CCI sector at European and national level concentrate on its economic value and employment data, analysing the strengths of the sector, how it is organised and represented and the measures necessary to support it. This tends to be the first level of analysis, assessing the economy of culture by defining CCI sectors, activities and patterns and developing a consistent, rigorous, transferable template for the analysis. In general, such baseline studies give a rather poor representation of export and internationalisation issues and focus more on the domestic market. This is particularly true for some of the earlier studies, both at European and national level, where the need to establish the economic value and volumes of the CCI sector in relation to national perceptions and policy was seen as the priority.

In later studies, particularly those undertaken after the world financial and economic crisis in 2008, the awareness of CCIs economic potential through internationalisation and export is often better articulated. Those EU MS that began to develop measures to support their CCI

sector more recently are far more likely to include the international dimension into the analysis and policy framework from the outset. A late start to developing policy measures to support cultural exports may therefore not be a disadvantage – and can indeed offer leapfrogging opportunities through the chance to learn from experiences piloted in other European contexts and avoid wasting time and resources on poorly targeted, ill-conceived approaches.

It is also worth noting that smaller EU MS are not necessarily disadvantaged by limitations of scale in identifying an appropriate pathway for CCI export strategies. Rather, it can sometimes be the larger EU MS that are hindered from developing a clear coherent approach by complex territorial and sectoral divisions of responsibility, regional and federal structures and the sheer number of bodies engaged in arts, culture, business development, external trade and international policy. Some of the most positive and well-documented examples of CCI export strategies and internationalisation practices found in this mapping come from medium-sized EU MS.

In recent years, there have been several dedicated programmes to boost cultural exports in Europe which present examples of well articulated policy and practice, often accompanied by a body of evaluation which offer significant learning points. These include the national cultural export development strategy in Finland (2007-2011), Nordic region initiatives to support the creative industries (particularly since 2007), the designation of the Dutch cultural industries as a ‘top sector’ for investment in its growth potential (since 2011), identification of Design as the driver for innovation in Denmark, specific international sectoral programmes such as the DutchDFA for design, fashion and architecture and the work around the 2011 *Tallinn Manifesto*. All these contribute to a greater knowledge of the trends and patterns in cultural export in Europe and to relevant actions and initiatives in the field.

At this point, the evaluation reports of some longer term four-year programmes provide particularly valuable insights for policy makers as they offer a realistic timeframe for analysis of trends, implementation of strategies and achievement of results.

## **2.1. Studies and findings: UNESCO**

In 2005, the UNESCO Institute for Statistics (UIS) published *International Flows of Selected Cultural Goods and Services, 1994-2003*, the first report to take a fresh approach in measuring global flows of cultural goods and services. Using the UNESCO *Framework for Cultural Statistics* (1986), it presented data derived from customs and balance of payments over a ten year period. The study found that the trade in cultural goods almost doubled in the ten years, although the market was restricted to a limited number of countries where high-income economies were the largest producers and consumers of cultural goods. It found that in 2002, the European Union (EU15) occupied the leading position in the export of cultural goods, with 51.8% of all reporting countries; Asia was the second largest exporting region

with 21.2% share. For individual countries, the biggest exporter of cultural goods in 2002 was the United Kingdom, followed by the United States and China. The study found a lack of data on key sectors for the majority of developing countries and countries in transition, many of which were not represented in the findings.

Since this report, UIS has revised its 1986 framework for cultural statistics and published the *2009 UNESCO Framework for Cultural Statistics*. Evolved through an extensive global consultation process, the *Framework for Cultural Statistics* (FCS) is intended to be a tool for organising cultural statistics both nationally and internationally. Through its standard definitions, it allows for the production of internationally comparable data. The FCS adopts the Harmonised Commodity Description (HS) and Coding System version 2007 using customs statistics developed by the World Customs Organisation to define international flows of cultural goods. Cultural services data are captured using the Extended Balance of Payments Services Classification System (EBOPS). The report notes that the FCS has limitations in some cultural domains, for example, lacking differentiation between industry-based and artisanal craft for some materials-based HS codes. Cinema data also require complementary information from copyright collecting societies since the values declared at customs often refer to the master copy and do not include copyright values.

## **2.2. Studies and findings: UNCTAD/UNDP**

The UNCTAD/UNDP *Creative Economy Report 2010* is a substantial body of work which resulted from the technical cooperation project 'Strengthening the Creative Economy for Development' between the UNCTAD Creative Economy Programme and the UNDP Special Unit for South-South Cooperation. The *Creative Economy Report 2010* presents an international trade analysis which builds on the first global comparative analysis presented in the earlier *Creative Economy Report 2008* from the same project. The 2010 study presents data for 2002-2008 and provides some of the most recent analysis of trends and features in the international trade in creative goods and services. It notes:

- In 2008, the eruption of the world financial and economic crisis provoked a drop in global demand and a contraction of 12% in international trade. However, world exports of creative goods and services continued to grow, reaching \$592 billion in 2008, more than double their 2002 level, indicating an annual growth rate of 14% over six consecutive years.
- The creative industries have been generating increased revenue from the production, trade and distribution of their goods and services, as well as from the collection of copyrights associated with their use.

- Exports of creative goods accounted for the vast majority of world trade of creative industries (69% in 2008) recording an annual growth rate of 11.5% between 2002 and 2008.
- Exports of creative services represent a smaller proportion of the world trade of creative industries (31% in 2008). They show a higher annual growth rate of 17% over the 2002-2008 period but this also reflects the growing number of reporting countries in the statistical data.
- The creative industries are opening up new opportunities for developing countries to leapfrog into high-growth sectors of the world economy and increase their participation in world trade. The creative industries are driving trade and development gains in a growing number of countries, in both developed and developing countries, particularly in Asia.

The following table from the UNCTAD/UNDP *Creative Economy Report 2010* shows the breakdown in exports for creative goods, by sub-sector and economic group. It demonstrates a clear trend for higher growth rates over the 2002-2008 period in the developing economies (+132%) and transition economies (+204%), compared to developed economies (+78%). It also shows that Design<sup>13</sup> is by far the largest sub-sector for creative goods exports (59.5% in 2008).

Table 5.2 Creative goods: Exports, by economic group, 2002 and 2008 (in millions of \$)

	World		Developed economies		Developing economies		Transition economies	
	2002	2008	2002	2008	2002	2008	2002	2008
<b>All Creative Industries</b>	<b>204,948</b>	<b>406,992</b>	<b>127,903</b>	<b>227,103</b>	<b>75,835</b>	<b>176,211</b>	<b>1,210</b>	<b>3,678</b>
Art Crafts	17,503	32,323	8,256	11,443	9,202	20,715	45	164
Audiovisuals	462	811	425	726	35	75	3	10
Design	114,692	241,972	60,967	117,816	53,362	122,439	362	1,716
New Media	17,365	27,754	11,422	13,248	5,908	14,423	36	82
Performing Arts	9,689	26,136	8,947	22,539	698	3,323	43	274
Publishing	29,817	48,266	25,970	38,753	3,157	8,138	690	1,376
Visual Arts	15,421	29,730	11,916	22,578	3,474	7,097	31	56

Source: UNCTAD, based on official data in UN COMTRADE database

The report looks at the key players in the global market for creative goods. Within the global market, the list of the world's top 20 exporters of creative goods in 2008 (as shown in the following table 5.6) was headed by China, followed by the United States and Germany. Nine EU MS are found in the top 20 (Germany, Italy, United Kingdom, France, Netherlands, Belgium, Austria, Spain and Poland).

<sup>13</sup> Design in the UNCTAD classification covers interior, graphic, fashion, jewellery, toys.

**Table 5.6** Creative goods: Top 20 exporters worldwide, 2002 and 2008

Rank		Value (in millions of \$)		Rank	Market share %	Growth rate %
		2008	2002			
2008	Exporter	2008	2002	2002	2008	2003 - 2008
1	China	84,807	32,348	1	20.8	16.9
2	United States	35,000	18,557	3	8.6	13.3
3	Germany	34,408	15,213	6	8.5	14.7
4	China, Hong Kong SAR	33,254	23,667	2	8.2	6.3
5	Italy	27,792	16,517	4	6.8	9.7
6	United Kingdom	19,898	13,657	7	4.9	6.5
7	France	17,271	8,999	9	4.2	10.2
8	Netherlands	10,527	3,686	15	2.6	11.6
9	Switzerland	9,916	5,141	11	2.4	13.5
10	India	9,450	..	-	2.3	15.7
11	Belgium	9,220	5,387	10	2.3	6.7
12	Canada	9,215	9,327	8	2.3	-0.9
13	Japan	6,988	3,976	13	1.7	14.7
14	Austria	6,313	3,603	16	1.6	8.5
15	Spain	6,287	4,507	12	1.5	4.9
16	Turkey	5,369	2,154	23	1.3	15.0
17	Poland	5,250	1,983	24	1.3	14.9
18	Mexico	5,167	3,797	14	1.3	9.1
19	Thailand	5,077	2,899	18	1.2	10.3
20	Singapore	5,047	2,619	21	1.2	6.0

Source: UNCTAD, based on official data in UN COMTRADE database

Table 5.7 of top 10 exporters among developed economies also provides a useful indicator with six EU MS (Germany, Italy, United Kingdom, France, Netherlands and Belgium).

**Table 5.7** Creative goods: Top 10 exporters among developed economies, 2008

Rank	Exporter	Value (in millions of \$)	Market share (%)	Growth rate (%)
		2008	2008	2003-2008
1	United States	35,000	8.60	13.31
2	Germany	34,408	8.45	14.66
3	Italy	27,792	6.83	9.69
4	United Kingdom	19,898	4.89	6.47
5	France	17,271	4.24	10.16
6	Netherlands	10,527	2.59	11.59
7	Switzerland	9,916	2.44	13.54
8	Belgium	9,220	2.27	6.74
9	Canada	9,215	2.26	-0.94
10	Japan	6,988	1.72	14.74

Source: UNCTAD, based on official data in UN COMTRADE database

The report goes into considerable detail to analyse the international trade performance of different sub-sectors of creative industries, finding:

- **Performing arts**<sup>14</sup> The top ten exporters among developed economies in 2008: Germany took 21.6% of the market share, followed by the United States, Netherlands, Austria, Ireland, United Kingdom, Sweden, Japan, France and the Czech Republic.
- **Visual arts**<sup>15</sup> The top ten exporters among developed economies in 2008: United States took 28.8% of the market share, followed by United Kingdom, France, Switzerland, Germany, Japan, Italy, Canada, Netherlands and Belgium. However, the report notes the lack of transparency and regulation in the international art market, leading to only partial reporting and representation in the data.

In other sub-sector analysis of the leading exporters among developed economies in 2008, Germany led the Publishing and Printed Media exporters, while Italy was the leading Design exporter.

At a workshop in Amsterdam ‘Towards a Pan-European initiative in support of innovative creative industries in Europe’<sup>16</sup> in February 2010, organised by the European Commission’s Enterprise and Industry Directorate-General in cooperation with the City of Amsterdam, the European Design Centre, the Association of Dutch Designers and IIP Create, Edna dos Santos-Duisenberg, Chief of the Creative Economy Programme at UNCTAD (United National Conference on Trade and Development) in Geneva, made a presentation on the economic impact of the creative industries in the global economy.

Edna dos Santos-Duisenberg stated that the Creative Economy “is one of the most dynamic sectors of the world economy and international trade, generating revenues, jobs and export earnings, while promoting social inclusion and human development”. The presentation compared data between 1996 and 2005 as outlined in the two following tables, noting that the creative economy was leading trade in Europe in 2005.

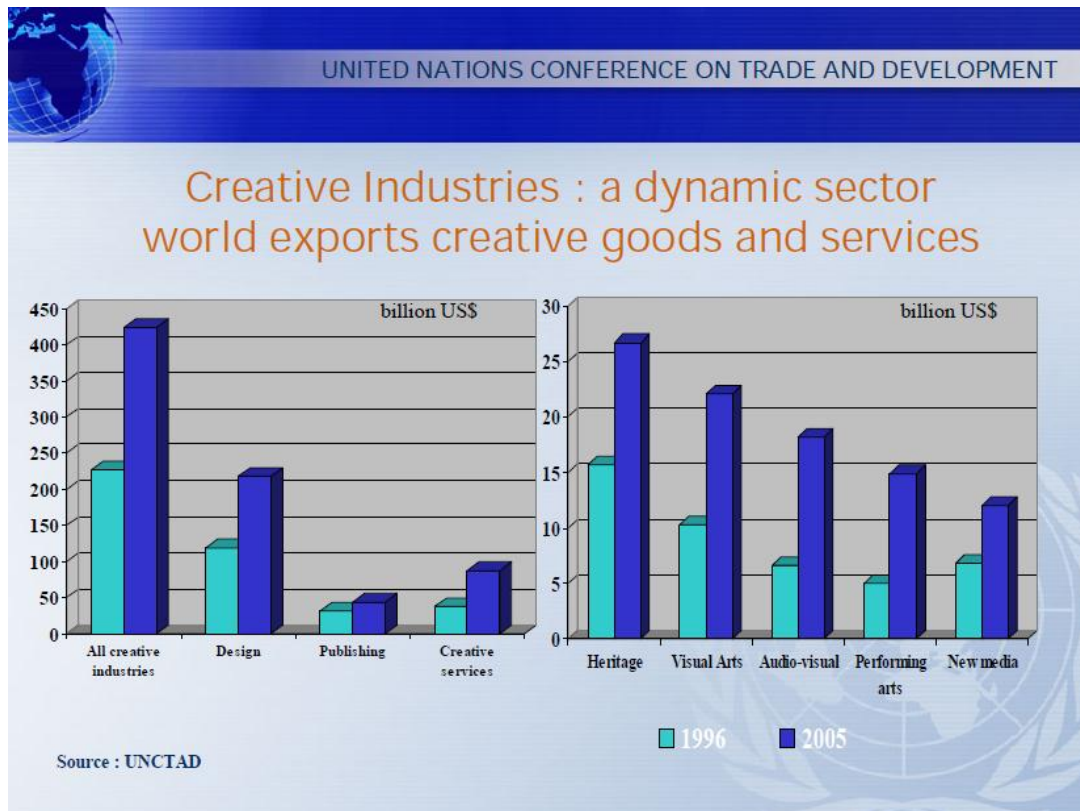
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<sup>14</sup> UNCTAD category: Live music, theatre, dance, opera, circus, puppetry etc.

<sup>15</sup> UNCTAD category: Painting, sculpture, photography and antiques.

<sup>16</sup> [http://www.europe-innova.eu/web/guest/home/-/journal\\_content/56/10136/178407](http://www.europe-innova.eu/web/guest/home/-/journal_content/56/10136/178407) [04/09/2012]





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<sup>17</sup> UNCTAD (E. dos Santos) [http://www.europe-innova.eu/web/guest/home/-/journal\\_content/56/10136/178407](http://www.europe-innova.eu/web/guest/home/-/journal_content/56/10136/178407)

UNCTAD's statistics service, UNCTADstat, continues to compile, validate and process data on the world trade in creative goods and researchers can now access statistics up to 2010. For this mapping, three tables have been drawn up from the UNCTADstat data<sup>19</sup> to show the trade and growth rates in creative goods. The tables show the categories and sub-categories for creative goods which are included in the UNCTAD data.

Creative goods exports from the EU in 2010 represented 36% of the total value of creative goods exports worldwide. The growth rate in creative goods exports from the EU has slowed from 6.69 for the period 2002-2010 to 0.39 for the period 2006-2010. The figures for the most recent period are much lower than those for the world economy, where the growth rate of creative goods exports 2006-2010 was 3.35. The highest annual export figures were recorded in 2008 when EU creative goods exports represented 40% of world exports.

The sub-sectors for EU creative goods exports which showed the strongest growth in the period 2006-2010 were video games, toys and recorded media, while the weakest performing sub-sectors over the period were antiques, film and photography.

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<sup>18</sup> UNCTAD (E. dos Santos) [http://www.europe-innova.eu/web/guest/home/-/journal\\_content/56/10136/178407](http://www.europe-innova.eu/web/guest/home/-/journal_content/56/10136/178407)

<sup>19</sup> <http://unctadstat.unctad.org/ReportFolders/reportFolders.aspx>



**TABLE 1: Growth rates of creative goods exports and imports, annual, 2002-2010**

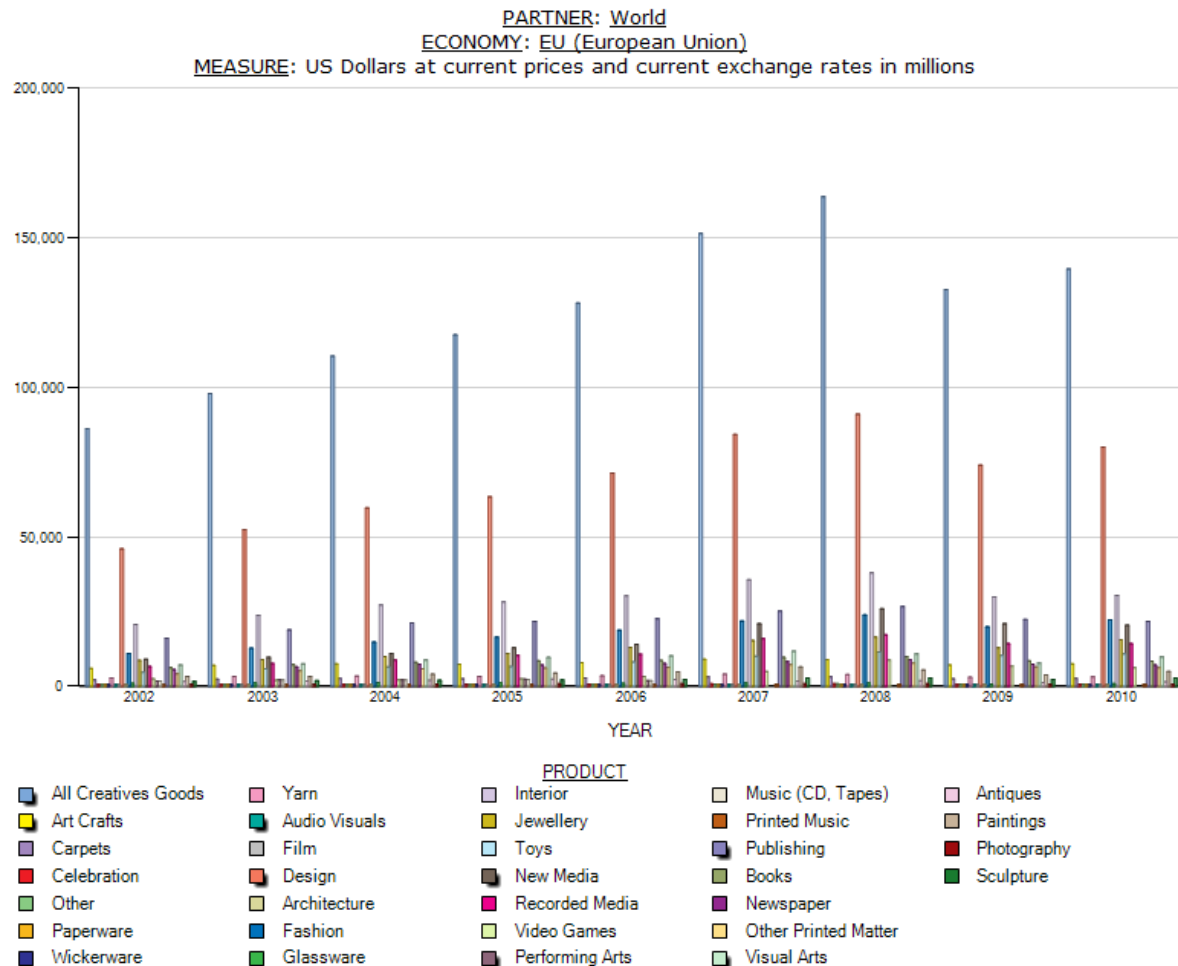
MEASURE (Annual average growth rates) ECONOMY (EU – European Union), Partner (World)

PERIOD	2002 - 2010		2006 - 2010	
FLOW	Exports	Imports	Exports	Imports
PRODUCT				
<b>All Creative Goods</b>	<b>6.69</b>	<b>7.71</b>	<b>0.39</b>	<b>1.16</b>
<b>Art Crafts</b>	<b>2.56</b>	<b>3.58</b>	<b>-3.37</b>	<b>-2.68</b>
Carpets	2.89	3.32	-3.66	-2.73
Celebration	3.45	5.44	-2.06	-0.69
Other	6.94	4.60	4.29	-1.18
Paperware	7.20	-4.55	-4.20	-16.33
Wickerware	4.80	4.67	-3.60	-3.13
Yarn	1.14	2.59	-4.87	-3.72
<b>Audio Visuals</b>	<b>0.90</b>	<b>-2.89</b>	<b>-11.17</b>	<b>-15.83</b>
Film	0.90	-2.89	-11.17	-15.83
<b>Design</b>	<b>7.57</b>	<b>8.64</b>	<b>1.00</b>	<b>1.90</b>
Architecture	10.52	-8.01	-3.21	-0.31
Fashion	9.45	9.50	2.49	3.46
Glassware	-2.98	-0.81	-7.08	-6.32
Interior	5.37	7.36	-1.65	0.30
Jewellery	8.33	9.43	1.93	0.30
Toys	11.67	9.78	6.04	4.00
<b>New Media</b>	<b>13.87</b>	<b>14.66</b>	<b>7.96</b>	<b>9.30</b>
Recorded Media	11.84	11.04	4.63	2.84
Video Games	19.76	20.78	17.49	20.53
<b>Performing Arts</b>	-	-	-	-
Music (CD, Tapes)	-	-	..	..
Printed Music	3.25	2.92	-2.98	-4.04
<b>Publishing</b>	<b>3.95</b>	<b>3.84</b>	<b>-2.01</b>	<b>-3.08</b>
Books	3.79	5.70	-1.81	-0.72
Newspaper	3.22	2.12	-2.54	-5.64
Other Printed Matter	5.07	3.85	-1.67	-2.56
<b>Visual Arts</b>	<b>3.39</b>	<b>4.62</b>	<b>-4.69</b>	<b>-4.10</b>
Antiques	-3.42	-1.30	-12.30	-7.21
Paintings	5.23	7.01	-4.76	-5.15
Photography	0.47	0.31	-7.30	-3.13
Sculpture	6.19	5.67	2.46	-1.27

Source: UNCTAD, UNCTADstat ( **Missing values:** .. Not available or not separately reported. – Not publishable)

**TABLE 2: Values and shares of creative goods: 2002-2010**

Exports from EU to the world



Source: UNCTAD, UNCTADstat

The share of the market of creative goods exports from the EU in 2010 was dominated by design (57% of all creative goods exports), replicating the findings in the previous periods. Within the sub-categories of creative goods, the highest market share of exports was recorded by interior design (22%), fashion (16%) and recorded media (10%).

**TABLE 3: Values and shares of creative goods, exports, annual, 2002-2010**

MEASURE (US Dollars at current prices and current exchange rates in millions)

ECONOMY (EU – European Union), PARTNER (World)

YEAR	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>PRODUCT</b>									
<b><u>All Creative Goods</u></b>	<b>86,139</b>	<b>97,862</b>	<b>110,457</b>	<b>117,509</b>	<b>128,155</b>	<b>151,389</b>	<b>163,725</b>	<b>132,587</b>	<b>139,606</b>
<b><u>Art Crafts</u></b>	<b>5,961</b>	<b>6,959</b>	<b>7,494</b>	<b>7,380</b>	<b>7,873</b>	<b>8,989</b>	<b>8,950</b>	<b>7,130</b>	<b>7,447</b>
Carpets	2,058	2,368	2,615	2,554	2,817	3,156	3,117	2,517	2,617
Celebration	522	604	640	693	697	820	799	647	708
Other	450	518	574	571	603	710	864	734	732
Paperware	17	18	16	15	25	26	41	22	21
Wickerware	137	172	206	213	235	244	244	210	211
Yarn	2,778	3,280	3,443	3,334	3,496	4,032	3,885	3,000	3,158
<b><u>Audio Visuals</u></b>	<b>214</b>	<b>232</b>	<b>300</b>	<b>248</b>	<b>311</b>	<b>348</b>	<b>318</b>	<b>265</b>	<b>198</b>
Film	214	232	300	248	311	348	318	265	198
<b><u>Design</u></b>	<b>45,965</b>	<b>52,373</b>	<b>59,699</b>	<b>63,404</b>	<b>71,325</b>	<b>84,204</b>	<b>90,987</b>	<b>73,958</b>	<b>79,987</b>
Architecture	110	162	155	159	199	324	342	291	178
Fashion	10,946	12,696	14,761	16,388	18,750	21,826	23,812	19,834	22,241
Glassware	989	1,046	1,168	1,053	983	1,120	1,064	748	833
Interior	20,651	23,782	27,151	28,211	30,247	35,664	37,947	29,918	30,391
Jewellery	8,624	8,867	9,953	10,987	12,988	15,229	16,394	12,923	15,513
Toys	4,646	5,821	6,511	6,607	8,158	10,042	11,427	10,242	10,830
<b><u>New Media</u></b>	<b>9,043</b>	<b>9,716</b>	<b>10,888</b>	<b>12,798</b>	<b>13,959</b>	<b>20,889</b>	<b>25,902</b>	<b>20,977</b>	<b>20,432</b>
Recorded Media	6,594	7,674	8,765	10,349	10,731	15,954	17,182	14,209	14,260
Video Games	2,450	2,042	2,123	2,450	3,228	4,936	8,720	6,768	6,172
<b><u>Performing Arts</u></b>	<b>1,785</b>	<b>2,178</b>	<b>2,145</b>	<b>2,373</b>	<b>1,890</b>	-	-	-	-
Music (CD, Tapes)	1,732	2,115	2,072	2,297	1,812	..	..	..	..
Printed Music	53	63	73	76	78	81	82	73	70
<b><u>Publishing</u></b>	<b>16,041</b>	<b>18,867</b>	<b>21,113</b>	<b>21,687</b>	<b>22,617</b>	<b>25,135</b>	<b>26,645</b>	<b>22,379</b>	<b>21,652</b>
Books	6,218	7,252	8,005	8,481	8,624	9,614	9,983	8,494	8,374
Newspaper	5,594	6,420	7,317	7,155	7,593	8,295	8,899	7,381	7,079
Other Printed Matter	4,230	5,195	5,791	6,052	6,400	7,226	7,764	6,504	6,200
<b><u>Visual Arts</u></b>	<b>7,129</b>	<b>7,535</b>	<b>8,816</b>	<b>9,619</b>	<b>10,181</b>	<b>11,743</b>	<b>10,841</b>	<b>7,804</b>	<b>9,820</b>
Antiques	1,571	1,756	2,047	2,345	2,277	1,759	1,804	1,165	1,451
Paintings	3,265	3,266	4,036	4,413	4,838	6,419	5,448	3,742	4,965
Photography	685	679	770	803	877	860	885	673	679
Sculpture	1,609	1,835	1,963	2,058	2,189	2,705	2,704	2,225	2,725

Source: UNCTAD, UNCTADstat

Missing values: .. Not available or not separately reported - Not publishable

### 2.3. Studies and findings: EUROSTAT

The Statistical Office of the European Communities – EUROSTAT – published the first *Cultural Statistics pocketbook* in 2007 with comparable data relating to culture available within the European Statistical System, plus information from other sources (UNESCO, *Eurobarometer*, etc.).

The second edition of the Eurostat *Cultural statistics pocketbook* was published in 2011 and implements a new version of the classification of economic activities, allowing a better coverage of cultural sectors. The 2011 pocketbook presents and analyses external trade in cultural goods for 2004-2009 and for the year 2009.

For cultural exports, it reports:

- In 2009, the EU-27 exported more cultural goods to the rest of the world than it imported, recording a trade surplus of around EUR 1.9 billion. The main products exported were books and works of art (mainly paintings). The highest export/import ratio was recorded for newspapers, journals and periodicals (3.7), meaning that the EU exported nearly four times as many such publications as it imported.
- Nearly half of the EU Member States reported a trade surplus in cultural goods. The ratio of exports to imports ranged from 2.8 to 1.8 in Poland, Estonia, Lithuania and Germany, while it stood below 0.5 in Ireland, Cyprus, Greece, Luxembourg, Portugal and Romania.
- EU exports of cultural goods fell by 4% a year between 2004 and 2009. Antiques exports were the most affected by this drop (-16% annually), while the greatest increase was noted for DVDs (+14% annually).
- Between 2004 and 2009, a sizeable increase in cultural goods exports was observed in many Eastern European countries. The reverse trend was observed in Romania, with declining exports and fast-growing imports.
- Works of art and antiques accounted for the greatest share of extra-EU cultural exports, followed by books, newspapers and DVDs. This ranking is strongly influenced by the high value of works of art and antiques exported by the United Kingdom and France. In the majority of countries, books are the main cultural items exported.
- In 2009, exports from the EU-27 to the rest of the world were widely distributed, with 40% shipped to 189 countries.

External trade in cultural goods **6**

**Table 6.1:** EU-27 <sup>(\*)</sup> external trade in cultural goods in million EUR, 2009

Cultural goods	Statistics on trade of cultural goods in million EUR			
	Exports	Imports	Balance	Ratio EXP/IMP
Books	2 221	1 651	570	1.3
Newspapers, journals and periodicals	718	194	524	3.7
CDs	153	65	88	2.4
DVDs	421	146	275	2.9
<b>Musical instruments</b>				
Pianos	64	87	-23	0.7
Guitars, violins, etc.	45	127	-82	0.4
Clarinets, trumpets, keyboards, etc.	107	98	9	1.1
Percussion instruments	25	82	-57	0.3
Electronic instruments	40	350	-310	0.1
Musical boxes	7	15	-9	0.4
Parts and accessories	107	157	-51	0.7
Total	394	917	-523	0.4
<b>Works of art, collectors' pieces and antiques</b>				
Paintings	1 770	1 181	589	1.5
Engravings	54	48	6	1.1
Sculptures	574	243	332	2.4
Postage stamps	37	32	5	1.2
Collections	141	334	-193	0.4
Antiques	471	244	227	1.9
Total	3 047	2 082	965	1.5
<b>Total of cultural goods</b>	<b>6 955</b>	<b>5 055</b>	<b>1 899</b>	<b>1.4</b>

(\*) EU-27: excluding Intra-EU trade.

Source: Eurostat, Comext

These statistics cover only external trade in tangible goods and do not include external trade in licences and copyrights.

- Over half of all newspapers, journals and periodicals exported by the EU to the rest of the world went to neighbouring countries: 35% were exported to Switzerland, 5% to Norway and 18% to Russia.
- Altogether, 54% of EU exports of musical instruments went to the United States (27%), Japan (18%) and Switzerland (9%).
- In 2009, 91% of all works of art, collectors' pieces and antiques exported from the EU-27 went to only eight countries, including the United States (42%), Switzerland (30%) and Ukraine (7%).

External trade in cultural goods **6**

**Table 6.3:** External trade in cultural goods, 2009 and AAGR 2004–09 (%)

	Exports			Imports			Balance 2009	
	Million EUR	Of which % of intra-EU trade	AAGR 2004-09	Million EUR	Of which % of intra-EU trade	AAGR 2004-09	Million EUR	Ratio EXP/IMP
<b>EU-27 (*)</b>	6 955	:	-4.1	5 055	:	-1.0	1 899	1.4
<b>BE</b>	884	91	1.3	1 123	74	1.5	-239	0.8
<b>BG</b>	16	85	23.8	21	77	13.1	-4	0.8
<b>CZ</b>	396	89	10.2	287	89	6.2	109	1.4
<b>DK</b>	251	59	-2.5	354	76	8.6	-102	0.7
<b>DE</b>	4 279	69	0.7	2 399	68	3.9	1 880	1.8
<b>EE</b>	42	68	14.7	16	59	1.1	26	2.6
<b>IE</b>	103	83	-10.8	436	93	5.2	-333	0.2
<b>EL</b>	89	76	8.4	218	51	11.6	-129	0.4
<b>ES</b>	755	50	-5.2	735	58	-2.2	20	1.0
<b>FR</b>	2 317	42	3.5	2 044	71	0.7	274	1.1
<b>IT</b>	833	71	-3.3	719	74	-0.3	115	1.2
<b>CY</b>	6	97	-1.5	48	93	-1.1	-42	0.1
<b>LV</b>	24	50	20.9	23	77	3.9	1	1.1
<b>LT</b>	38	50	13.8	15	77	2.8	23	2.5
<b>LU</b>	35	96	-16.6	111	94	-2.1	-77	0.3
<b>HU</b>	76	70	17.0	98	86	0.6	-22	0.8
<b>MT</b>	7	89	-5.5	12	80	-11.9	-6	0.5
<b>NL</b>	911	86	-3.2	845	51	1.1	66	1.1
<b>AT</b>	548	78	-9.9	981	92	3.8	-433	0.6
<b>PL</b>	499	85	11.4	179	83	3.4	319	2.8
<b>PT</b>	47	24	5.8	172	88	-3.9	-125	0.3
<b>RO</b>	21	55	-3.2	91	92	24.4	-71	0.2
<b>SI</b>	76	56	-0.7	57	66	4.6	19	1.3
<b>SK</b>	121	88	5.3	94	95	12.2	27	1.3
<b>FI</b>	110	49	-9.9	217	87	2.5	-106	0.5
<b>SE</b>	397	52	11.3	447	69	1.9	-50	0.9
<b>UK</b>	4 489	41	-6.4	3 068	36	-4.3	1 421	1.5

(\*) EU-27: excluding intra-EU trade.

Source: Eurostat, Comext

Cultural goods include books, newspapers, CDs, DVDs, musical instruments and works of art but do not cover licences or copyrights.

Reading note: In Belgium, 91 % of cultural goods are exported to other EU Member States.

Around half of EU MS record exports of cultural goods as a higher percentage of total exports in 2009 compared to the figures for 2004, thus indicating an increased export share of cultural goods.

The main export destinations in 2009 for EU cultural goods were:

<b>Books</b>	Switzerland (19%)	USA (15%)	Norway (6%)
<b>Newspapers, journals</b>	Switzerland (35%)	Russia (18%)	Tunisia (7%)
<b>Musical instruments</b>	USA (27%)	Japan (18%)	Switzerland (9%)
<b>CDs</b>	Switzerland (23%)	Norway (20%)	USA (17%)
<b>DVDs</b>	Norway (31%)	Switzerland (29%)	Russia (8%)
<b>Works of art &amp; antiques</b>	USA (42%)	Switzerland (30%)	Ukraine (7%)

#### **2.4. Priority markets for EU Member States: sectors**

The types of strategies, measures and activities undertaken by EU MS and other bodies to develop export and internationalisation of the CCIs are set out in Chapter 3 while the research identified a large number of bodies involved in export and internationalisation in EU MS (see Annex 1). These findings present strong evidence of priority sectoral markets, if one considers the level of public investment and activity found for the promotion of certain types of cultural goods and services. There are many similarities in the types of support bodies involved in cultural export across EU MS, particularly in the traditional types of sector support initiatives many of which have been in existence for years. However, there is also some evidence that new forms of engagement which connect cultural and trade bodies are emerging, often arising from bottom-up initiatives from the sector.

##### **Audiovisual**

The Audiovisual sector, particularly Film, has long been an intensely internationalised sector dependent on foreign distribution and sales transacted at major market and festival events worldwide. All EU MS have designated bodies (almost all are separate from the state cultural authorities) with a responsibility for the promotion of their national film production.

Many of these organisations (particularly the national Film Institutes) incorporate a range of other activities such as film production funding, domestic market development and analysis, training, arts education and film location promotion. However, in several of the larger EU MS, there are dedicated national film export organisations (e.g. Unifrance, German Films Service + Marketing and Finnish Film and Audiovisual Export), generally with larger budgets for international promotion and a more proactive approach to market development. A strategic engagement in international film co-production is another form of export development since it carries international distribution benefits. This takes the form of policy development (bilateral film co-production agreements), funding support for co-productions and attending/organising co-production markets at film festivals.

## Books and Publishing

The books market is also intrinsically international, reliant on translation and the rights markets organised at international book fairs worldwide. E-publications are a major export opportunity and the international online sales trade has completely overturned traditional national and international book distribution systems.

In this field, international promotion is often split between state-funded bodies with a responsibility for international promotion of a country's literature (e.g. Flemish Literature Fund, Ireland Literature Exchange and Poland's Book Institute) and international marketing by publishers, through collective and individual business activity (e.g. Estonian Publishers Association). The export and internationalisation of this sector demonstrates particularly the potential tension between cultural (dialogue, diversity, language promotion) and commercial (enormous business opportunities) objectives. This competition/cooperation relationship is described as 'coopétition' by the French ministry department responsible for CCIs<sup>20</sup> and by others in the business economics field<sup>21</sup>.

The large market share taken by international online retailers of books (also of music, audiovisual and other creative content) and the complex business strategies<sup>22</sup> of some of the major players in the field may influence the distribution and reliability of national export statistics. Further investigation is required to determine whether this is an important factor in any emerging shifts in export patterns.

## Design

Design (including fashion, interior, architecture, jewellery etc.) is recognised as an important export sector in many EU MS. This is partly due to inherent strengths of the European design field as well as the size of the market (see above for sector results in the UNCTAD/UNDP *Creative Economy 2010* and UNCTADstat data). Design is a field where both micro-enterprises and large-scale design and fashion businesses can share an export platform, to mutual benefit.

National bodies to support the international promotion of design companies, their products and services are active in many EU MS (e.g. Association pour la Promotion de la Création

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<sup>20</sup> Ministère des Affaires étrangères : Direction Générale de la Mondialisation:  
<http://www.diplomatie.gouv.fr/fr/enjeux-internationaux/cooperation-culturelle-et-medias/industries-culturelles-et/article/les-enjeux-80916>

<sup>21</sup> [http://crrm.u-3mrs.fr/web/IMG/pdf/Coopetition\\_in\\_Business\\_Networks\\_to\\_Cooperate\\_and\\_Compete\\_Simultaneously.pdf](http://crrm.u-3mrs.fr/web/IMG/pdf/Coopetition_in_Business_Networks_to_Cooperate_and_Compete_Simultaneously.pdf)

<sup>22</sup> For example, it was reported that Amazon.co.uk, Britain's largest online retailer, was under investigation for the period when ownership was transferred to a Luxembourg company. Amazon's tax affairs are reported as currently under investigation in the US, China, Germany, France, Japan and Luxembourg:  
<http://www.guardian.co.uk/technology/2012/apr/04/amazon-british-operation-corporation-tax>



Industrielle/APCI in France, Wallonie-Bruxelles Design/Mode, Barcelona Design Centre, Design Excellence Estonia, British Fashion Council and Dutch Design Fashion Architecture – DutchDFA). The focus on export promotion is often found alongside activity to promote the country or city as a design destination, generating inward investment in the form of cultural tourism and through major trade events (e.g. London Fashion Week).

Some design promotion bodies are specific to one branch (e.g. fashion) while others seek synergies between allied sectors. The DutchDFA programme is a particularly interesting strategy in this respect linking design, fashion and architecture (see Chapter 3).

Design is a field which is also well represented in the activities of CCI development bodies (e.g. ADDICT Creative Industries Portugal) and by trade and export bodies (e.g. the well-documented Luovimo international growth programme for creative industry companies in Finland set up by Finpro, the state body for international trade).

Design is a strategic policy priority in some countries and may be linked to innovation strategies. Denmark has implemented a new Design Policy to strengthen Danish design as a trade, both on national and international scenes. The ambition is to bring Denmark back into the international design elite, thus improving the country's international competitiveness.

## **Music**

Many EU MS have music export bureaux (e.g. Export Music Finland, Austrian Music Export and the Nordic agency NOMEX). Dedicated music export bureaux are found in all Nordic and most Northern European countries. Denmark has at least three bodies responsible for the international promotion of different types of music. France's bureauexport offers a large range of services through its international network. There was a recent proposal to set up a music export office in Portugal, although the project is currently on hold due to the economic crisis. Most of the bodies receive public funding although some are industry-led (e.g. Germany Music Export Office, a body of the German Rock and Pop Music Association).

Music is thus relatively visible in EU MS in terms of export support and these bodies play a valuable role in organising showcases, supporting international promotion and representation, sharpening the export skills of music professionals and improving their business competence. Nevertheless, the economic influence of the commercial music industry and its international marketing budgets by far outweigh the activities of such bodies. The music market can be notoriously capricious and unpredictable in its international taste.<sup>23</sup>

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<sup>23</sup> Witness the extraordinary 2012 global phenomenon of "Gangnam Style" from South Korea: over 550m YouTube viewings of music video by Korean rapper Psy in 3 months. <http://culture360.org/news/gangnam-style-boosts-south-korean-brand/>

## **‘Born global’**

While this is not a specific cultural and creative industry sector, there is a rising awareness of the phenomenon of ‘born global’ companies. Such companies are young and small, and have internationalised their businesses within a very short period after their establishment. They are very prevalent among new CCI businesses; such micro-enterprises may defy conventional categories, crossing boundaries in the media-design-music-fashion fields, as well as the product-service division. The born global business phenomenon is aligned to mobility, social media connectivity, and may be fostered within the internationally diverse art and design institutes in Europe where many such companies take shape. The born global generation of CCI companies have a different starting point, embody substantial export and growth potential and may require a different spectrum of business support measures from those developed for more traditionally structured companies.

## **2.5. Priority markets for EU Member States: geographical**

There is clear evidence of priority geographical markets for CCIs in EU MS, although the full picture is not always publicly available and, in a period of economic uncertainty, may be subject to change. It is notable that target geographical markets are rarely seen as applying to all CCIs within one particular country. They can also be different for the same sub-sector from one country to another (i.e. the priority market for Finnish design may not be the same as that for Spanish design). Thus, one can observe a high degree of specialisation with different priority markets for different sectors in the different countries. This is usually backed up by in depth market analysis although many other factors can and do influence the selection and rotation of priority markets.

It is worth noting that, while there is strong interest in the well-documented developing and emerging economies of the world where a growing middle-class fuels demand for cultural goods from Europe (so-called BRICs<sup>24</sup> and CIVETS<sup>25</sup>), there is also clear evidence that EU CCIs look to their neighbours as target markets for cultural export. The ease of trading within the EU internal market is a major factor and a number of examples demonstrate that, for many in the sector, the most profitable export market may in fact be on their doorstep.

SICA in the Netherlands produced an annual report on *The Art of Exporting*<sup>26</sup> documenting in a particularly innovative visual format (a map poster with charts) the patterns and volumes of export of Dutch cultural activities. A rare model of originality and good practice in analysis and presentation, the 2011 report points out several important trends, including the relation between cultural exports and national export patterns:

<sup>24</sup> Brazil, India, China, Russia

<sup>25</sup> Colombia, Indonesia, Vietnam, Egypt, Turkey, South Africa

<sup>26</sup> [http://www.sica.nl/sites/default/files/the\\_art\\_of\\_exporting\\_2011.pdf](http://www.sica.nl/sites/default/files/the_art_of_exporting_2011.pdf)

Comparing cultural exports and regular exports has its limitations, but it does show how culture and commerce from a small country find their way in the world and where opportunities lie for their eventually going together.

The Netherlands has one of the most export-oriented economies in the world. Due to its strategic location, the Netherlands is increasingly becoming a transit country for products made elsewhere. The export of our own products has also slightly increased over the last few years, but lags behind the growth of re-exportation activities.

One can compare the export of cultural productions to the export of other products. However, the nature of cultural exports differs considerably from our regular exports in one important aspect: in the area of culture, we are not a transit country, but send out our own productions.

Our biggest cultural export product is music, with almost 5.000 performances in 2011, followed by film, art and theatre, ranging from 1.000 to 2.000 presentations each in 2011. As an export country, the Netherlands is traditionally focused on Western Europe. In 2011, almost three quarters of our total exports went to Western Europe, namely Germany (24%), Belgium (12%) and the United Kingdom (8%). Outside Europe, the United States was our most important business partner, with an export share of 4%.

The export of our cultural products followed fairly closely on the heels of general export trends: almost two thirds of Dutch international cultural activities in 2011 took place in Western Europe. If we look at the volume of our exports to Greece, Ireland, Italy, Luxembourg, Malta, Austria, Spain, the United Kingdom and Switzerland in relation to total exports, we see that its percentage share was pretty much equal to that of our cultural exports.

Outside our most important market, Western Europe, culture also pretty much followed the trends of the entire Dutch export market, with the United States – just as with total exports – being the biggest customer for Dutch cultural productions. With 12% of all Dutch performances and exhibitions going to the United States, culture did even better here than commerce: the export share of Dutch cultural productions in the United States was three times as large as the export share of the United States in total Dutch exports.

Over 9% of our international cultural activities took place in Asian countries. China is an important partner in the cultural sphere, growing from 2.9% in 2010 to 3.5% of total cultural exports in 2011. Around 2.9% of cultural productions went to Japan. There are other countries in Asia where the Netherlands has strong economic ties, but where the cultural relation is clearly less close. For example, South Korea is the most important economic market in Asia after China but the share of cultural productions from the Netherlands that goes there is relatively small. The same is true for Singapore.

National trade promotion targets, major world event opportunities, political, linguistic, cultural, geographical and economic alliances and proximities are other factors influencing the identification of priority markets. For some EU MS, the traditional cultural diplomacy format of 'cultural years' celebrating the culture of country X in country Y, often aligned to a

diplomatic anniversary, is being seen as an opportunity to profile export and investment opportunities. Cultural diplomacy has long been a mechanism to oil the wheels of international trade and is now also a potent opportunity for CCI export promotion in line with stated policies and priorities developed within the European Agenda for Culture and subsequent reports.

The evidence for geographical priority markets for the goods and services of CCIs in EU MS is therefore complex and needs to be balanced by investigation of the particular sector, context, timing and market analysis.

A sample of current priority markets identified through mapping of EU MS CCIs includes:

- DutchDFA: over the 4-year strategic programme (2009-2012) aiming to strengthen the international position of Dutch design, fashion and architecture the four focus countries are **India, China, Turkey and Germany**.
- France has a particularly strong investment in international promotion of French books, through a new dedicated portal FranceLivre and the activities of the Bureau international de l'édition française (BIEF). In 2012 BIEF presented French publishers at nineteen international book fairs and markets, the majority of these events outside the EU including **Abu Dhabi, São Paulo, Beijing, Taipei, Seoul, Casablanca, New Delhi, Istanbul, Moscow and Guadalajara**.
- The Nordisk Film & TV Fond received additional funding for a Globalisation Fund (2010-2012) for distribution support and market research into opportunities for Nordic film and TV content outside the Nordic region. Market research for the **BRIC countries (Brazil, Russia, India & China)** has been commissioned and a new video-on-demand partnership established with a distributor in the **United Kingdom**.
- The Nordic Music Export Programme (NOMEX) is currently focused on strengthening the **intra-Nordic market** for Nordic music.
- Litrix, the Goethe-Institut programme for the worldwide promotion of contemporary German literature, selects a focus language for its translation programme. This is currently **Russian**, and previous languages were **Spanish, Portuguese, Chinese & Arabic**.
- 'Imagine Ireland' was a 2011 festival of Irish arts in the **United States** to celebrate Irish creativity and artistic talent, and encourage tourism and other investment.
- Spain organised 'Spain arts & culture' showcase festival in the **United States** in 2012.

- The UK organised 'UK Now' an 8-month festival of British arts and creative industries in 2012 in **China**.
- 'Germany and India 2011-2012: Infinite Opportunities'<sup>27</sup> is a collaborative 16-month event in **India** to celebrate 60 years of Indo-German diplomatic relations. The programme demonstrates a strong convergence of business, cultural, political, design, technology, science and education interests.
- ADDICT Creative Industries Portugal plans a trade mission to **Brazil** in 2013, tied in with the Year of Portugal in Brazil.
- A Danish-**Australia** promotion took place in 2011 with Danish design and art exhibitions in Sydney and Melbourne. The collaboration between art, culture and commerce was organised to tie in with a Danish export drive to Australia.
- AWEX, the export and investment agency for businesses in the Belgian French-speaking community, has two target markets in 2012: **Northern Italy** and the **Chinese province of Hubei**.
- A UK Trade & Investment market briefing<sup>28</sup> identifies opportunities in **France** for British animation content.
- Design Forum Finland's target areas for the international promotion of Finnish design are **Central Europe, Russia, Japan** and the **United States**.
- The Design Business Association in London has produced Country Guides for the creative industries with tips, contacts and case studies for doing business in **China, Brazil, Hong Kong, India, United Arab Emirates, USA** and **France**.
- bureauexport, the music export bureau for the French music industry, has offices in **London, Berlin, New York, Tokyo** and **São Paulo**.
- German Films Service + Marketing, the centre for the international promotion of German films, has carried out market studies into **33 territories worldwide**.
- The European Music Office published *Music Export Handbooks* for **France, Germany, UK, United States, Japan, Brazil, Finland, Spain, Russia** and **Austria**.

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<sup>27</sup> <http://www.germany-and-india.com/en/page/219/the-year-of-germany-in-india>

<sup>28</sup> <http://www.ukti.gov.uk/uktihome/sectorbriefing/334160.html>

### **3. Strategies in CCI export and internationalisation**

This research examined the types of measures, activities and means existing in the field of CCI export and internationalisation in EU Member States. A listing of some of the main bodies involved in such strategies is presented in Annex 1, with criteria for inclusion.

The research revealed a huge number of organisations involved in such strategies across the EU and the listing should be taken as a first step in profiling the relevant agencies and range of measures rather than as a comprehensive database.

At the political level, CCI export and internationalisation covers government ministries and agencies dealing with arts and culture, education, foreign affairs, employment and trade & industry/economics/business affairs, with large variations between EU MS in the organisation of ministries, departments and the degree of cross-ministry coordination.

At the geographical (and political) level, many countries have different responsible bodies for federal states, regions and cities in both the culture and business fields.

Within the various sub-sectors of the CCIs (e.g. design, music, fashion, books, art galleries, antique dealers etc.) each country again demonstrates a different level of segmentation. In the Annex 1 listing for Finland, for example, there are separate sector organisations for the international promotion of design, visual arts, dance, theatre, music, film and audiovisual export, film, animation, literature and computer games. In some countries, different types of music have different sector bodies responsible for its export and promotion. In many countries there are separate bodies representing different areas of the film business. Literature and the publishing industry often have separate bodies responsible for international promotion and export activity.

Some bodies are solely financed by public sources (arts and culture, trade and investment, foreign affairs – sometimes a mix of public funding from different government departments), others are membership associations with a proportion of their export services paid for by CCI business members.

This chapter aims to present a typology of strategies for CCI export and internationalisation with some brief examples taken from Annex 1.

#### **3.1. European initiatives**

Europe-wide strategies to support CCI export and internationalisation fall into two main areas: joint promotional initiatives by European networks/industry bodies and European

projects (EU-funded) which aim to pilot actions and share good practices between partners in different EU MS. Two examples:

#### *European Film Promotion*

EFP is an international network of organisations promoting and marketing European cinema worldwide. Its members are professional organisations from 33 European countries. Joint promotions and other activities take place under the EFP umbrella.

#### *Creative Metropoles*

The project CREATIVE METROPOLES was co-financed by the European Regional Development Fund and Norwegian funding through the INTERREG IVC programme. It brought together 11 European cities to share experiences on the support measures provided for creative industries, including business capacity and internationalisation strategies.

### **3.2. Regional cultural export strategies**

This measure concerns export strategies for CCIs which are devised as a joint programme between different national governments. They should provide an additional level of international promotion to complement national and sub-national strategies. The strongest examples of this approach are currently found in the *Nordic region*.

#### *KreaNord*

KreaNord is a Nordic initiative, conducted by the Nordic Council of Ministers which is designed to improve the growth prospects for the region's cultural and creative industries. One of the recommendations of the Green Paper commissioned in 2007 to develop a pan-Nordic policy to develop and promote the region's CCIs was to create a credible "Nordic Creative Brand" to develop the export and internationalisation of Nordic CCIs.

#### *NOMEX*

The Nordic Music Export Programme (NOMEX) is a collaborative promotional programme for national music export offices in Finland, Sweden, Norway, Denmark and Iceland. Some international showcases (London, Madrid, Tokyo) and training activity; the international promotion in the first phase focuses on developing the intra-Nordic market for Nordic music.

#### *Nordic Game Program*

A programme of the Nordic Council of Ministers to support the development and international promotion of high quality Nordic computer games, running 2006-2012.

#### *Nordisk Film & TV Fond*

The allocation of a Globalisation Fund grant from the Nordic Council of Ministers for 2010-2012 has enabled the organisation to develop the international promotion of Nordic Film and



TV content outside the Nordic region. The High Five programme (see Annex 1 for details) had an interim evaluation and concludes in 2012.

*Nordic film & music sectors: harmonised cultural export statistics collection and presentation*

The long-term collaboration across the Nordic region between music export offices and national film promotion bodies has led to a concerted effort in recent years to harmonise the collection and presentation of statistics. Annual statistical surveys, including export data, are presented in the same format in the different Nordic countries which allows for meaningful comparative analysis and evidence-based policy.

### **3.3. National cultural export strategies: all CCI sectors**

*Finland: Programme for Cultural Export Promotion 2007-2011*

The Ministry of Education and Culture in Finland launched a review of the state of the country's cultural exports in 2005. This first study then led to the Programme for Cultural Export Promotion 2007-2011, drawn up by the Working Group for the Development of Cultural Exports, an expert group composed of sector representatives. The Programme was implemented across all CCI sectors with regular evaluation. A final report was published in 2011 and the cultural export promotion activity now continues in other forms, having embedded itself into cultural policy and arts management practice in Finland.

The vision of the Programme was to make cultural exports into a recognised part of Finnish export activities, as well as making culture a stronger element of Finland's country brand. The final evaluation found that cultural exportation has become more streamlined and a natural part of the business of more and more companies in the sector. Some goals were not achieved: tripling the value of cultural exports was too ambitious given challenges in the market; the budget resources and government 'toolkit' for export promotion were still deemed inadequate. Nevertheless, the Programme was seen to have worked well as a platform for the intensification of strategic and practical cooperation between ministries. It achieved close cooperation between the Ministry of Education and Culture, Ministry of Employment and the Economy and the Ministry for Foreign Affairs, and other ministries were part of the joint steering committee.

The Finnish export trade body, Finpro, devised a new programme, Luovimo, to scale up the internationalisation and export activity of creative industry companies in Finland. Twenty companies were selected for the first round (2010/11) with the practical results and important key findings and recommendations published online. The selected companies for the second phase (2012/13) have now started the programme.

The latest 2020 strategy of the Ministry of Education and Culture focuses even more on the competitive edge of the Finnish economy and culture. The vision is to place Finland among the top countries in the world in intellectual competence, sharing and creativity by 2020.



*Netherlands: creative sector earmarked as a 'top sector' for investment and growth*

The government of The Netherlands earmarked the creative sector as a top sector in 2011 in view of its current strong position and scope for growth. The government, industry and science will target investment in this sector. A top team has been created for each national top sector. Actions are taken by the government and the sector together. The creative industry must reorganise and connect with other Dutch top sectors to be able to join the world top by 2020. In order to realise this, the government supports the establishment of the Dutch Creative Industries Council (D-CIC). This Council coordinates the implementation of the action plan according to the golden triangle principle (collaboration between the industry, knowledge institutes and the government). The government has created an annual fund of €250,000 for this purpose through the CLICKNL programme.

### **3.4. National cultural export strategies: specific sectors**

Two current EU MS initiatives provide examples of national cultural export and internationalisation strategies developed for particular sectors.

*Netherlands: DutchDFA*

The Dutch Design Fashion Architecture (DutchDFA) aims to strengthen the international position of Dutch design, fashion and architecture, by building long-lasting international partnerships. The four-year strategic programme (2009-2012) identifies focus countries (India, China, Germany and Turkey).

- Research relevant to the internationalisation of Dutch design has been undertaken.
- Dedicated Dutch Design Workspaces have been set up in Mumbai and Shanghai, offering a home base for visiting Dutch designers wanting to set up partnerships and enter the Indian and Chinese markets.
- The Dutch Design Desk Europe set up in Maastricht helps Dutch firms in the creative sector find German business partners.
- The Dutch Design Desk Istanbul is for Dutch designers and design companies aiming to enter the Turkish market and for Turkish parties interested in collaborating with Dutch designers.

The Dutch DFA programme is a joint public-private initiative, supported by the Dutch Ministries of Economic Affairs, Agriculture & Innovation, of Education, Culture & Science and of Foreign Affairs (a cross-ministry cooperation which is quite exceptional in the Netherlands). Involved are the sector-specific organisations Premisla, Dutch Institute for Design and Fashion, and the Netherlands Architecture Institute; professional branch associations BNO, BNA, BNI, and MODINT; and the Dutch creative hubs of Amsterdam, Arnhem, Eindhoven, Rotterdam, The Hague and Utrecht. The future of the programme is under review after it is due to end in 2012.

DutchDFA can be seen as a pilot for a more integrated strategy that could involve the other sectors of the CCIs and is now being tested through the designation of the CCIs in the Netherlands as top-sector, meaning that the government sees it as a field which can make a big difference to the country's international competitiveness and innovative power. The goal is to make the Netherlands the most creative economy in Europe by 2020.

*Denmark: Design Policy*

The new Design Policy for Denmark has evolved over several years. A government white paper *DesignDenmark* was presented in 2007 setting out the challenges. In 2010, a Danish Design 2020 Committee was convened to develop a vision paper, published in 2011. *The Vision of the Danish Design 2020 Committee* publication articulates the vision and process for developing and branding Danish design to contribute to growth, productivity and innovation. Implementation of the business policy aspects for improved support for Danish design is under a government body, working to the Ministry of Economic & Business Affairs.

### **3.5. Sub-national cultural export strategies (cities and regions)**

These initiatives aim to improve the competitiveness of CCIs in designated cities and regions within a country, through targeted internationalisation and export programmes.

*Germany: Creative.NRW*

A CCI initiative of the North Rhine-Westphalia federal state, the programme has an objective of developing an international presence for CCIs from the region and improving export opportunities.

*Spain: Barcelona Design Centre*

Runs the BCN Design Export programme, aiming to promote the Barcelona Design brand (products and services made in the Barcelona region) internationally.

*Germany: Berlin Partner*

Focused on both inward investment and export support, Berlin Partner makes full use of the city's reputation as a creative city, and organises promotional events abroad (Berlin Days).

*Austria: departure – the Creative Agency of the City of Vienna*

Business promotion agency and service centre for CCIs in Vienna. International orientation, through business advice, mentoring and funding is available.

### **3.6. Trade and industry support measures**

Government initiatives at national level often link trade and investment, dealing with both export and inward investment from abroad. Some such initiatives give particular recognition to the CCIs, with designated programmes, advisory services etc.

#### *Belgium: Flanders Investment & Trade (FIT) and UNIZO*

FIT is the government agency for Flanders promoting international business. UNIZO is the union of self-employed entrepreneurs which assists SMEs in Flanders in their international activities, including exports, imports and investment.

#### *Estonia: Enterprise Estonia*

EAS promotes business and regional development in Estonia, including improving the export and product development capability of Estonian companies, market research, advice etc.

#### *United Kingdom: UK Trade & Investment*

UKTI helps UK-based exporters succeed in international markets and assists overseas companies to bring investment to the UK. It offers a wide range of export services and has a specific 'Creative and Media' industry sector for its export programme.

### **3.7. Business support programmes for CCIs**

These are initiatives which may be national or sub-national and offer general business support to CCIs. There may be an international element.

#### *Sweden: Generator Swedish Creative Industries*

It aims to develop and promote the CCIs in Sweden through a range of activities.

#### *Portugal: ADDICT Creative Industries*

Part of the organisation's core mission is to support the internationalisation of its creative entrepreneur members. It plans various export actions.

### **3.8. International promotion by sector-specific bodies**

This type of strategy covers the many examples of sector-specific bodies with programmes to export and develop international promotion of the cultural productions from their country (or region). It includes the bodies responsible in all EU MS for film and audiovisual. It also includes the many bodies responsible for book and literature promotion, music export offices, design promotion agencies and other such organisations.

These types of bodies generally represent the sector in international trade events (see Annex 2), may organise showcases, catalogues (e.g. of film production, books in translation), provide grants to artists and CCI business representatives for international market promotion etc.

Examples of sector bodies:

*Austria: Unit F Designer Support* (fashion)

*Belgium: Flanders Image* (audiovisual)

*Belgium : Wallonie-Bruxelles Musique* (music)

*Czech Republic Czech Film Center* (film)

*Denmark: Danish Crafts* (craft & design)

*Greece: Hellas Film* (film)

*Italy: Filmitalia* (film)

*Hungary: Hungarian Books & Translations Office* (books)

*Poland: The Book Institute* (books)

*Slovakia: Slovak Film Institute* (film)

*Portugal: Portuguese Association of Art Galleries* (visual arts)

### **3.9. Grants for trade fairs, showcases and other promotion activity**

Grants for artists, promoters, publishers, music producers, games makers and other representatives of CCI businesses to take part in international trade fairs and market-oriented festivals are an important element of the export strategies undertaken in EU MS. Annex 2 provides information on important international CCI trade events identified through this research. Many grants are provided by sector-specific bodies and the other CCI programmes listed above, as well as by trade and export organisations. The most useful forms of support are flexible, not just grants for exhibiting at trade fairs but smaller travel grants to attend such events, do market research/intelligence building, scouting and business partner networking. In some EU MS there are other bodies responsible for international promotion, including trade fairs, festivals, showcases, invitations to foreign promoters to attend national events etc.

*Ireland: Culture Ireland*

Provides grants, organises showcases and platforms for Irish artists and companies. Recently organised a major year-long festival in the USA. Also provides grants to invite promoters from overseas to attend festivals/showcases in Ireland.

*Malta: Creative Malta*

In its early stages, the *Draft National Strategy for the Cultural and Creative Industries* aims to 'position Malta as an attractive, contemporary and stimulating creative hub within the Mediterranean region, with strong emphasis on exchange and access to international markets and includes proposals for various initiatives under 'Exporting Creative Malta' to

enable Maltese participation in international events (book fairs, design festivals, film pitching sessions).

### **3.10. Export finance measures**

There is interest in the development of financial measures to support the development of CCIs, including export-related finance. Research was recently published for the Nordic region 'Mapping of Nordic Creative and Cultural Industries Financial Environment'.

#### *France: OSEO*

A public sector institution which offers various financial measures to support export initiatives for SMEs in France. It has been used in the film sector for international distribution.

#### *Finland: FINNVERA*

Financing solutions for Finnish businesses, including export credit guarantees. A recent example concerned a Finnish architecture company exporting design services to China.

### **3.11. World event promotions & nation branding**

Governments use major world events as a platform to promote their culture and international trade, to foster business networking and for nation branding. Expo 2010 Shanghai saw a substantial investment by all EU Member States in national pavilions for the universal exposition, with exhibitions and showcases of arts, culture, design and media alongside trade events. The Netherlands ran an extensive programme and set up a Dutch Cultural Centre in Shanghai<sup>29</sup> for the duration of Expo 2010. The next scheduled Universal Exposition Expo 2015 will be hosted by Milan.

The UK government presented a strong business programme alongside the London 2012 Olympic Games, aiming to capitalise on the export and trade opportunities presented by the event. The Global Business Summit on Creative Content<sup>30</sup> was the creative industries event organised by UK Trade & Investment in London focused on commercialising creativity in the international marketplace. Participating Olympic nations set up 'National Hospitality Houses' around London; some of these presented national cultural programmes; they were also seen as a prime opportunity for business networking<sup>31</sup> by London companies.

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<sup>29</sup> <http://www.2010dcc.com/>

<sup>30</sup> <http://www.ukti.gov.uk/export/sectors/globalsportsprojects/britishbusinessembassy/item/314020.html>

<sup>31</sup> <http://www.londonbusinessnetwork.com/2012-opportunities/wider-business-opportunities>

## 4. Summary and Recommendations

### 4.1 Summary contextualising the analysis

The essential focus of this report is international flows in CCI goods and services involving sales (goods, services, rights and other IP) that would register in an economic analysis of a country's trade balance. In relation to EU CCI exports and trends, the existing quantitative and qualitative knowledge and evidence base in this crucial area – particularly in the context of rapid globalisation and digitisation – needs a lot of development, at both EU and MS levels, in order to be sufficiently robust to inform policy for appropriate intervention and support.

It is significant that many of the relevant strategic documents relating to the CCI sector published or commissioned by the EC in the past five years (2007-2012) make relatively little mention of the importance of the export market as a driver for import substitution and innovation. In the 2010 Green Paper, *Unlocking the potential of cultural and creative industries*, for example, there are just three such references, although one of these is substantive and highly relevant to the concerns of this report:

'Nurturing world-class CCIs and exporting their works, products and services obviously entails developing links with third countries. SMEs in particular require support to establish contacts and to have their activities promoted abroad. Industry-to-industry dialogue, scouting missions and market intelligence, and collective representation in international fairs are among the specific tools developed to support exports. Cooperation schemes offer both an opportunity for mutual learning and a network of contacts abroad. Facilitating artistic exchanges with third countries is also important to stimulate cultural diversity'.

Furthermore, the report invites the Member States to 'encourage more balanced cultural exchanges and reinforce international cooperation and solidarity.'

In more recent documents relating to the forthcoming 2014-2020 period, including *Europe 2020: A strategy for smart, sustainable and inclusive growth*, there are just three such references. In *Creative Europe*, essentially the framework document for the Commission for the coming seven year cycle, there are none.

There are some notable recent exceptions to this pattern of lack of attention to CCI export, where more focus is placed on the *strategic* value of exports, including the 2011 Impact Assessment Commission *Staff Working Paper accompanying the Regulation to establish a Creative Europe Framework Programme* which cites the *European Competitiveness Report 2010-11*, noting that:

‘... while a number of studies and policy documents indicate the growing importance of trade in creative products, and the sound export performance of the cultural and creative sectors, this issue until now has almost never been studied in a thorough way’ (p. 9).

No doubt this was part of the stimulus for the establishment of the OMC Working Group and commissioning of the present mapping. *The Impact Assessment* also notes the generally healthy and growing economic status of the CCI sector as a whole as follows:

‘In the years leading up to the economic downturn, namely 2002-2008, trade in goods and services from the creative industries grew on average 14% annually, even after taking into account the sharp contraction of world demand and international trade in the final months of 2008. As the decline in international trade affected all economic sectors, it is still premature to draw a definite picture regarding its adverse impact on the creative economy. For instance, world exports of visual arts doubled in six years, reaching \$29.7 billion in 2008. The same trend was noticed for exports of audiovisual services, which amounted to \$13.7 billion in 2002 and reached \$26.4 billion in 2008, although much of the trade in audiovisual products occurs in the form of rights transactions as the means for buying and selling creative content, for which data is unavailable.’<sup>32</sup>

And finally, to underscore the urgency of the situation with regard to a sufficient knowledge and evidence base for a proper treatment of CCI exports in the context of digitisation and globalisation, the same report notes:

**‘These figures are still highly underestimated and cannot capture the more vibrant reality of the global markets of creative industries, due to limitations in statistical data and methodologies that obscure the revenues from the trade of copyrights and for some key services sectors. Indeed, these represent the major share of key creative industries such as the music and film industries, TV and radio broadcasting, performing arts, and trade in digitised creative content.** Just to give an idea of the magnitude of the creative economy and its overall economic impact, the PwC 2008 study forecast that the global entertainment and media industry alone will be injecting around \$2.2 trillion in the world economy in 2012’.<sup>33</sup>

In this situation there is an urgent need for some recasting of the major categories of definition and evaluation of what we mean by ‘exports’, ‘imports’, ‘visibles’ and ‘invisibles’ and, indeed, what economist Jane Jacobs termed ‘the mercantilist tautology that nations are the salient entities for understanding the structure of economic life’<sup>34</sup>, even when presented in data on an aggregated regional/EU basis.

The 2011 KEA report *Mapping the Cultural and Creative Sectors in the EU and China* is rightly focused on imports and exports between the EU and China. With China now both the

<sup>32</sup> European Commission (2011a), p. 124.

<sup>33</sup> European Commission (2011a), pp. 124-125. *Emphasis* added.

<sup>34</sup> Jacobs, Jane (1986), *Cities and the Wealth of Nations: Principles of Economic Life*, London, Pelican Books, p.44.



sixth largest global importer and third largest exporter of cultural and creative goods, this study is another exception to the general silence on exports, for obvious reasons of policy and trade imperatives. As the report notes, even with the market for EU cultural goods and services growing by 58% since 2004, the available measures for this are inadequate, especially in relation to the core, reproducible, and constant income-generating product of the CCI sector: *intellectual property*.

'The insufficient enforcement of IPR, the lack of IP understanding as a tool to foster trade transactions, together with the size of the cultural operators – SMEs with little access to foreign markets – as well as the lack of political awareness on the economic importance of the creative industries, are the main structural reasons for insufficient trade relationships between Europe and China in the cultural and creative sectors.' (p.4)

In dealing with the CCI sector then, there would appear to be a need for a new, more nuanced approach to the sector's distinctive features, not only in terms of exceptionality, public goods, etc., but also in more strictly economic terms as what Michael Porter characterises as essentially *traded industries*:

'These industries sell products and services across regions and often to other countries. They locate in a particular region based not on resources but on broader competitive considerations'<sup>35</sup>

Traded industries (as distinct from local industries serving a local market), in the US for example, account for about 32% of employment but have much higher productivity, higher patenting rates (and therefore IP renewability) and higher wages than either local or resource-dependent extractive or agricultural industries. Traded industries – a category in which we can include the creative industries, especially because of the digital renewability and re-purposing of content and product – according to Porter, 'appear to heavily influence the relative prosperity of regions'. In a European Union of both nation states and regions – especially city-regions – such an approach would be appropriate across national borders along with more focus on the specifically 'traded' dimension of the CCIs.

To this more customised approach to the traded dimensions of the CCI sector we can add the advice in the 2010 Work Foundation publication *A Creative Block? The Future of the UK Creative Industries: A Knowledge Economy & Creative Industries report* that:

'... the creative industries role in job creation should be seen as much about driving future exports, technology applications, and innovation both within the sector itself and across the rest of the economy as about job generation directly.'<sup>36</sup>

<sup>35</sup> Michael Porter (2004) 'The Economic Performance of Regions' in Association of Regional Observatories, *The State of Regional Research*, p. 11.

<sup>36</sup> Benjamin Reid, Alexandra Albert and Laurence Hopkins (2010) *A Creative Block? The Future of the UK Creative Industries: A Knowledge Economy & Creative Industries report*, The Work Foundation, London.  
[http://www.theworkfoundation.com/assets/docs/publications/277\\_a%20creative%20block.pdf](http://www.theworkfoundation.com/assets/docs/publications/277_a%20creative%20block.pdf)

Recent initiatives in some smaller EU member states seem to be moving concertedly in this direction, and have implications for appropriate actions at EU level within the OMC. We note, for example, three relevant recommendations from the 2011 *Tallinn Manifesto*<sup>37</sup> under Theme 2 - *Driving innovation and competitiveness across the economy*:

- 'We attend to the specific elements that make creative businesses and entrepreneurs "exceptional", and integrate approaches where such exceptionalism doesn't exist. For example, introduce investment readiness activities for creative businesses but only introduce targeted investment where there is real evidence of market failure in mainstream investment sources (such as retail banks, equity funds etc.). For example, introduce export insurance incentives for businesses trading in creative goods and services only where there is evidence of weaker exports for such businesses because of inaccessibly high insurance costs. This requires an evidence-based approach and one grounded on knowledge rather than aspiration.
- We open up international markets for creative businesses by brokering peer exchanges between entrepreneurs working in different markets. Just as we encourage exchange between policy-makers ... we should encourage both knowledge and trade-focused collaboration between different creative businesses. This is particularly important in smaller markets where access to skills and different types of capital is limited. We can support our creative entrepreneurs to "scale-up" through international collaboration.
- We develop a set of globally recognised metrics for valuing intangible assets. This means mapping effective business models, tracking returns on investment, and balancing an appreciation of the different assets in a business (or consortia of businesses) – such as in management, finance, marketing and technology.'

Similarly Malta's 2012 *Creativity Works: A report on Malta's Creative Economy and a Strategy for the Cultural and Creative Industries*<sup>38</sup> pays a great deal of attention to CCI exports in the context of both economics and internationalisation. The report cites Hannele Koivunen's 2005 report *Staying Power to Finnish Cultural Exports*<sup>39</sup>:

'The new definition of cultural exportation covers interaction potential and needs in an ever globalising world. The model, which before was solely based on the idea of exportation, has evolved into inter-cultural partnership, in which products and productions are reciprocally imported from and to cultures.'

Partly basing the strategy on the idea of Malta as a 'Creative City State' the report and strategy undertakes a detailed 20 page Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis of CCI exports by sub-sector. This constitutes a very useful template which might be developed in other MS and, at a more macro and generic level, by the EC.

<sup>37</sup> [http://www.looveesti.ee/creative-entrepreneurship/materials/The\\_Tallinn\\_Manifesto.pdf](http://www.looveesti.ee/creative-entrepreneurship/materials/The_Tallinn_Manifesto.pdf)

<sup>38</sup> <http://www.creativemalta.gov.mt/>

<sup>39</sup> [http://www.minedu.fi/export/sites/default/OPM/Julkaisut/2005/liitteet/opm\\_251\\_opm09.pdf](http://www.minedu.fi/export/sites/default/OPM/Julkaisut/2005/liitteet/opm_251_opm09.pdf)

Given that background and with an indication of directions and emphases from one of the smallest EU Member States we now move on to specific recommendations.

## 4.2 Recommendations

Based on the mapping, findings, and analysis of this report, in the context of both accumulated new knowledge about the CCI and contiguous sectors, and in the new emergent policy environment and architecture for the sector, **Three Key Action Areas** have been identified. Each has a core recommendation and a number of related auxiliary actions.

### **Action Area 1      Identify, promote and distribute best practice**

#### *Rationale*

There is a good deal of best practice in regard to CCI exports in the EU and also a good deal of weak, poorly targeted/implemented practice. To fully map and identify best practice in the CCI sector we **recommend** that the work of this report be built on through a longer term and more substantial policy and practice knowledge exchange and research into CCI export initiatives and internationalisation strategies in the following ways:

- (i) By undertaking SWOT analyses of each sub-sector of the CCI sector at EU level using and building on existing templates developed at EU and MS level.
- (ii) On the basis of this analysis, especially in addressing weaknesses and opportunities, develop a central 'clearinghouse' programme and facility to enable exchange of initiatives, strategies, programmes and policies on good and best practice on priority areas in CCI exports.
- (iii) By developing and expanding the membership and capacities of the Expert Group based on the needs identified above through identification of possible Member State representatives; and through presentations to the OMC Working Group and others of significant examples of policy and practice, as identified in the mapping.
- (iv) By undertaking research into the new types of data and indicators that are available or need to be developed in the context of both globalisation and digitisation in relation to both so-called trade 'invisibles' in imports and exports, especially in relation to IP and rights transactions, intangible heritage, traditional knowledge.
- (v) Undertake a detailed analysis of the implications and significance for CCI exports of new digital media platforms, especially social media, and portable devices (pods, pads, phones, tablets, readers) for demand and market stimulation, creation and production, distribution, access, and consumption of EU cultural product and experience in a global *market space*.

## **Action Area 2      Define the field of action and build the knowledge and evidence base for CCI exports**

### *Rationale*

There is currently a wide variation within EU documentation and usage across EU MS of the distinct categories of ‘cultural industries’ and ‘creative industries’, to the extent that they are often posed in contrast to each other rather than being seen as part of a single ‘ecosystem’. This is disabling for policy and resourcing at EU and MS levels and creates unnecessary hindrances and conflicts of interest in relation to funding, parity of regard, esteem, and treatment.

While it is clear from this report that there is considerable effort going into CCI export strategies, initiatives, and policies across EU MS large and small, it is equally clear that these efforts are very unevenly spread and are *in need of a ‘common language’, in both quantitative and qualitative forms, in order for harmonised and co-ordinated enabling actions to be undertaken at EU level*. Respecting the principles of subsidiarity and, within the framework of the OMC, we **recommend** developing a work plan targeted at:

- (i) Co-ordinating, synthesising and harmonising data collection frameworks and methods for the CCI sector between the EU, UN System of National Accounts (SNA) data, and the UNESCO 2009 *Framework for Cultural Statistics*.
- (ii) Encouraging and enabling MS within the OMC to harmonise data collection and analysis with these internationally accepted frameworks.
- (iii) Consolidating, as far as possible, an established and common usage of the terms ‘Cultural and Creative Industries’ or ‘Cultural and Creative Sectors’ to include, as in current EU documents and practice since 2010, and as currently defined in Article 2, Definitions of the Proposed Regulation before Council and Parliament<sup>40</sup>, both commercial and subsidised cultural actors.

## **Action Area 3      A joined-up, evidence-based policy for and investment in CCI export development**

### *Rationale*

Anticipating the developments and shifts in policy settings for the CCI sector, as foreshadowed within the *Europe 2020 Strategy* and the *Creative Europe Framework*

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<sup>40</sup> ‘Cultural and Creative sectors’ means all sectors whose activities are based on cultural values and/or artistic and creative expressions, whether these activities are market or non-market oriented and whatever the type of structure that carries them out. These activities include the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or creative expressions, as well as related functions such as education, management or regulation. The cultural and creative sectors include in particular architecture, archives and libraries, artistic crafts, audiovisual (including film, television, video games and multimedia), cultural heritage, design, festivals, music, performing arts, publishing, radio and visual arts.

*Programme 2014-2020, including possible synergies with other EU initiatives in the areas of cohesion and inclusion, new regional agendas, The Digital Agenda for Europe, and related programmes in the areas of competitiveness and innovation, we **recommend** that the EC and EP pursue and develop a more 'joined-up' integrated and synergistic policy and programme budgeting architecture for CCI exports and related fields of internationalisation with regard to:*

- (i) New data, information and knowledge needs which are responsive to new forms of digital export, new revenue streams and business models, rights transactions, and changes in the legal environment relating to IPR and DRM<sup>41</sup>.
- (ii) The development of programme and policy synergies with regional, digital, cohesion, and inclusion agendas informed by new data, information and knowledge with regard to CCI exports.
- (iii) The changing nature of the value production chains or 'culture cycles' in the CCI sector provoked especially by the digital shift, and the application of value production chain analysis as a strategic and diagnostic tool to identify strengths, weaknesses, opportunities and threats and to assist and guide policy and appropriate intervention.

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<sup>41</sup> Digital Rights Management – see <http://news.bbc.co.uk/1/hi/technology/6337781.stm>

## 5. Bibliography

This section presents an annotated bibliography of relevant publications and documents in the field of CCI export and internationalisation in Europe (including public documents and academic literature), published over the past five years. A small number of significant reports published at an earlier date are also included. Other reports (including market surveys) can be found through the organisations listed in Annex 1.

### Global / International

BOP Consulting. (2012) *World Cities Culture Report 2012*. London: Mayor of London. (150 pp.)

<http://www.worldcitiesculturereport.com/sites/all/themes/wccr/assets/pdfs/WorldCitiesCultureReport-lowres.pdf> [30/08/2012]

A major global initiative on culture and the future of cities, set up by the Mayor of London. The study launches a World Cities Culture Forum, linking the 12 cities around the world which were surveyed for this first study. One indicator is the percentage of creative industries employment in the city surveyed, although the study does not explore specific issues of internationalisation and export.

Hellkoetter, K. (ed.) (2011) *Europe-China Cultural Compass*. Beijing: Goethe-Institut/EUNIC. (294 pp.) <http://www.eunic-online.eu/node/445> [11/09/2012]

The *Europe-China Cultural Compass* provides orientation for cultural cooperation between Europe and China with informed background knowledge from experienced authors and commentators on cultural policy, cultural and creative industries, arts disciplines and themes, society, media, legal frameworks, value systems and intercultural cooperation issues. The publication is available as a free download in English and Chinese versions, and is an initiative by partners of EUNIC in China – the Goethe-Institut, British Council and the Danish Cultural Institute. While not focused on cultural export per se, it contains a lot of useful information for European CCIs doing business in China.

International Federation of the Phonographic Industry. (2012) *Recording Industry in Numbers – 2012 Edition*. Geneva: IFPI.

[http://www.ifpi.org/content/section\\_resources/rin/rin.html](http://www.ifpi.org/content/section_resources/rin/rin.html) [09/10/2012]

IFPI's Recording Industry in Numbers 2012 edition provides data on the recorded music market in 2011. The report, published annually, provides a comprehensive picture of the key trends of today's music business. It is an invaluable source of authoritative data and analysis about the recorded music market globally for music companies, analysts, investors, commentators and academics.



PricewaterhouseCoopers. (2012) *Global Entertainment and Media Outlook 2012-2016*. London: PwC.

<http://www.pwc.com/gx/en/global-entertainment-media-outlook/index.jhtml> [07/09/2012]

PwC's annual Global Entertainment and Media Outlook is a consistent, comprehensive online source of global analysis for consumer/end-user and advertising spending. With like-for-like, five-year historical and forecast data across 13 entertainment and media industry segments in 48 countries, the Outlook makes it easy to compare and contrast regional growth rates and consumer and advertising spend. The full data set is available on subscription. Insights, trends, forecasts for fastest growing markets etc. for the entertainment and media industry are available free online.

Staines, J. (2011) *Supporting international arts activity – issues for national arts funding agencies*. Melbourne: IFACCA D'Art Report No. 40. (88 pp.)

<http://www.ifacca.org/topic/international-arts-activity/> [13/09/2012]

The International Federation of Arts Councils and Culture Agencies (IFACCA) conducted a worldwide survey in English, French and Spanish, the results of which have been analysed and supplemented by other research and presented in this report. D'Art Report No. 40 describes the agencies involved in supporting international arts activities, the scope of and budgets for this support, and the range of policy objectives, priorities and evaluation processes evident in the research. The study identifies countries which prioritise cultural export and market development in their public policy and compares this with other objectives for international arts activity.

UNCTAD/UNDP (2008). *Creative Economy Report 2008. The Challenge of Assessing the Creative Economy: towards Informed Policy-making*. Geneva: United Nations. (357 pp.)

[http://unctad.org/en/Docs/ditc20082cer\\_en.pdf](http://unctad.org/en/Docs/ditc20082cer_en.pdf) [22/10/2012]

This is the first of two major reports (to date) published by UN agencies following the demise of UNESCO's World Culture Reports. Following the emergence of the concept of 'creative industries' into public policy discourse from 1999 and, especially, the 2001 publication of John Howkins' *The Creative Economy: How People Make Money from Ideas*, which was very influential on UNCTAD the decision was taken, in partnership with UNDP, to launch a major analytical publication on the creative economy, with a particular emphasis on developing countries, and entailing a shift from conventional models towards 'a multidisciplinary model dealing with the interface between economics, culture and technology and centred on the predominance of services and creative content. Given its multidisciplinary structure, the creative economy offers a feasible option as part of a results-oriented development strategy for developing countries. It calls for the adoption of effective cross-cutting mechanisms and innovative inter-ministerial policy action.'

UNCTAD/UNDP. (2010) *Creative Economy Report 2010*. Geneva: United Nations Conference on Trade and Development. (423 pp.)

[http://unctad.org/en/Docs/ditctab20103\\_en.pdf](http://unctad.org/en/Docs/ditctab20103_en.pdf) [04/09/2012]



Second report of the UNCTAD Creative Economy Programme, this study is viewed as one of the most comprehensive studies on and contribution to creative economy development. The report underlines the need for an evidence base and systematic analysis to understand the structure of the creative economy, its growth patterns and potential. A substantial level of detail is provided with statistical reports for world exports and imports of cultural goods, services and related industries

UNCTADstat. (2012) *Creative Economy statistical reports*. Geneva: United Nations Conference on Trade and Development.

<http://unctadstat.unctad.org/ReportFolders/reportFolders.aspx> [04/09/2012]

UNCTAD compiles, validates and processes a wide range of data from national and international sources on the world trade in creative products. Statistical reports are published for Creative goods, Creative services and Related industries. The creative economy statistical reports cover all countries of the world by sub-sector; data can be searched by country and economic grouping. Reports for:

- Growth rates of creative goods exports and imports, annual, 2002-2010
- Concentration index of creative goods exports and imports, annual, 2002-2010
- Values and shares of creative goods, exports, annual, 2002-2010
- Values and shares of creative goods imports, annual, 2002-2010
- Trade in creative services, annual, 2000-2010
- Growth rates of creative services exports and imports, annual, 2002-2010
- A series of reports for creative industries related goods and services exports

UNESCO. (2005) *Convention on the Protection and Promotion of the Diversity of Cultural Expressions*. Paris: UNESCO.

<http://unesdoc.unesco.org/images/0014/001429/142919e.pdf> [22/10/2012]

The aim of this Convention, adopted by UNESCO's Member States in 2005, is, in UNESCO's own words, to ensure 'the diversity of cultural expressions ... for today's local, national and international communities.' The Convention entered into force in 2007 and UNESCO has a commitment to 'new approaches to cultural expressions in their diverse forms – books, television programmes, music, live performances and many more' being developed.

UNESCO Institute for Statistics. (2005) *International Flows of Selected Cultural Goods and Services 1994-2003*. Montreal: UIS. (98 pp.)

[http://www.uis.unesco.org/Library/Documents/culture05\\_en.pdf](http://www.uis.unesco.org/Library/Documents/culture05_en.pdf) [14/09/2012]

This UIS report analyses cross-border trade data from about 120 countries on selected products, such as books, CDs, videogames and sculptures. It presents new methodology to better reflect cultural trade flows, thus contributing to UNESCO efforts to collect and analyse data that clearly illustrate the central role of culture in economic, social and human development. The global market value of cultural and creative industries has been estimated at USD 1.3 trillion and is rapidly expanding. According to the report, between 1994 and

2002, international trade in cultural goods increased from US \$38 billion to US \$60 billion. Three countries - the United Kingdom, United States and China - produced 40% of the world's cultural trade products in 2002 while Latin America and Africa together accounted for less than 4%, according to this UIS report.

UNESCO Institute for Statistics. (2009) *2009 UNESCO Framework for Cultural Statistics*. Montreal:UIS. (100 pp.)

<http://www.uis.unesco.org/Library/Documents/framework-cultural-statistics-culture-2009-en.pdf> [14/09/2012]

The framework provides concepts and definitions to guide the collection of comparable data in the area of culture. Accurate, comparable data are needed to better measure the impact and relevance of cultural policies and initiatives. The 2009 framework addresses this need by defining culture for statistical measurement purposes. Developed by the UIS in close collaboration with UNESCO's Culture Sector, the framework replaces the 1986 version. Designed for international and national application, the main goal of the 2009 framework is to facilitate comparisons through a common understanding of culture by using standardized definitions and classifications. It reflects global changes in technology, our understanding of fundamental cultural issues, advances in measurement and progression in cultural policy priorities that have occurred since the 1986 framework. The methodology is based on new and diverse perspectives on cultural statistics. The study is published in English, French, Spanish, Arabic, Chinese and Russian.

WIPO – World Intellectual Property Organisation. (2005 - 2012) *National Studies on Assessing the Economic Contribution of the Copyright-Based Industries*.

[http://www.wipo.int/ip-development/en/creative\\_industry/economic\\_contribution.html](http://www.wipo.int/ip-development/en/creative_industry/economic_contribution.html)

[13/09/2012]

WIPO has carried out national surveys of the economic contribution of copyright-based industries in the following EU Member States: Bulgaria, Romania, Hungary, Latvia, Finland, the Netherlands and Slovenia, as well as eighteen third countries worldwide.

## Europe

Creative Metropolises. (2010) *Creative Metropolises: Final Report & Good Practices from European Cities*. Riga: Creative Metropolises. (148 pp.)

<http://www.ccaa.nl/search/56973/nl> [13/09/2012] or <http://www.baltmet.org/creative-metropolises> [25/10/2012]

Note: the Creative Metropolises project website is no longer functional.

The Creative Metropolises network was an EU funded project which brought together 11 cities to share experiences on their support measures for creative industries. Business Capacity and Internationalisation was one of the five themes examined. The final project report presents good practices from the European cities involved in the project.

ECOTEC. (2009) *Information systems to support the mobility of artists and other professionals in the culture field: a feasibility study. Final Report*. Birmingham: ECOTEC. (167 pp.)

[http://ec.europa.eu/culture/documents/cultural\\_mobility\\_final\\_report.pdf](http://ec.europa.eu/culture/documents/cultural_mobility_final_report.pdf) [22/10/2012]

This study commissioned by the DG Education and Culture of the European Commission takes as its starting point the difficulties that are acknowledged to exist when artists and other cultural professionals seek to move across the borders of the EU (and also when nationals of third countries seek to enter and move around within the Union). Whilst these difficulties are now well-known, until this point little has been known or understood systematically about where cultural operators source the information that enables mobility to take place and how it might be improved to overcome the information obstacles that exist. This study aims to address gaps and develop practical solutions to how they can be tackled.

European Audiovisual Observatory: Department Marketing & Financing Information. (2012) *FOCUS 2012: World Film Market Trends*. Cannes: Marché du Film.

[http://www.obs.coe.int/oea\\_publ/market/focus.html](http://www.obs.coe.int/oea_publ/market/focus.html) [25/08/2012]

Now already in its fifteenth edition the FOCUS is commissioned from the European Audiovisual Observatory by the film market organiser at the Cannes Film Festival, the Marché du Film. The FOCUS presents the latest trends on all the major film markets around the world regarding film production and distribution as well as admissions.

European Creative Industries Alliance. (2012) *FAME: a Qualitative Mapping of Available Financing for European Creative Industry SMEs*. (248 pp.)

[http://cko.dk/sites/default/files/fame\\_final\\_mapping\\_report\\_may\\_2012.pdf](http://cko.dk/sites/default/files/fame_final_mapping_report_may_2012.pdf) [11/09/2012]

FAME is a cross-border European partnership bringing together four organisations in Italy, Germany and Denmark with extensive experience of financing promising companies in the Creative Industries. The report presents a mapping of the current provision of financing available to CCIs in Europe. It includes references to specific financial instruments available for export support.

European Commission. (2010a) *GREEN PAPER Unlocking the potential of cultural and creative industries*. Brussels: European Commission. (21 pp.)

[http://ec.europa.eu/culture/our-policy-development/doc/GreenPaper\\_creative\\_industries\\_en.pdf](http://ec.europa.eu/culture/our-policy-development/doc/GreenPaper_creative_industries_en.pdf) [04/09/2012]

The EU Green Paper sets out pathways for enabling Europe's CCIs to increase their capacity to build a strong creative economy and contribute to the Europe 2020 strategy. In terms of export strategies, the paper notes the EU's commitments under the 2005 UNESCO *Convention on the Protection and Promotion of the Diversity of Cultural Expressions* and asks which tools should be foreseen or reinforced at EU level to promote cooperation, exchanges and trade between the EU CCIs and third countries. The European Commission launched a consultation with the Green Paper and published an analysis of the responses.

European Commission. (2010b) *Communication from the Commission, EUROPE 2020. A*

*strategy for smart, sustainable and inclusive growth*. COM (2010) 2020 final.

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF>

[22/10/2012]

The ‘umbrella’ economic policy framework and statement for all EU actions in the 2014-2020 budget period. Europe 2020 puts forward three mutually reinforcing priorities: (i) *smart growth*: developing an economy based on knowledge and innovation; (ii) *sustainable growth*: promoting a more resource efficient, greener and more competitive economy; and (iii) *inclusive growth*: fostering a high-employment economy delivering social and territorial cohesion.

European Commission. (2010c) *Communication on a Digital Agenda for Europe*, COM (2010) 245 final/2. (42 pp.)

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0245:FIN:EN:PDF>

[22/10/2012]

The Digital Agenda for Europe is one of the seven flagship initiatives of the Europe 2020 Strategy, set out to define the key enabling role that the use of Information and Communication Technologies (ICT) will have to play if Europe wants to succeed in its ambitions for 2020. The objective of this Agenda is to chart a course to maximise the social and economic potential of ICT, most notably the internet, a vital medium of economic and societal activity: for doing business, working, playing, communicating and expressing ourselves freely.

European Commission. (2010d) *Europe's Digital Competitiveness Report 2010* (SEC) 627.

[http://ec.europa.eu/information\\_society/newsroom/cf/item-detail-dae.cfm?item\\_id=6499](http://ec.europa.eu/information_society/newsroom/cf/item-detail-dae.cfm?item_id=6499)

[22/10/2012]

The Digital Competitiveness Report analyses recent developments in important policy areas of the European information society and provides a significant evidence base for the European Digital Agenda — the European Commission's policy framework in the digital area and one of Europe 2020's flagships. Europe 2020, the new economic strategy for Europe, identifies Information and Communication Technology (ICT) as one of the key drivers for the smart, sustainable growth necessary to lead Europe out of the crisis.

European Commission. (2011a) *Impact Assessment* Accompanying the document *Regulation of The European Parliament and of The Council establishing a Creative Europe Framework Programme*, Commission Staff Working Paper. (171 pp.)

[http://ec.europa.eu/culture/creative-europe/documents/impact\\_en.pdf](http://ec.europa.eu/culture/creative-europe/documents/impact_en.pdf) [22/10/2012]

The European Commission impact assessment of the proposed single “Creative Europe” framework programme, bringing together the current Culture, MEDIA and MEDIA Mundus programmes. The proposal for a Creative Europe framework programme includes separate strands for Culture, MEDIA, a cross-sectoral strand (the latter will include a financial instrument for the cultural and creative sectors (CCS)). Contains extensive analysis and canvassing of policy options and, of direct relevance to this report's focus on CCI exports, it notes that ‘world exports of visual arts doubled in six years, reaching \$29.7 billion in 2008.

The same trend was noticed for exports of audiovisual services, which amounted to \$13.7 billion in 2002 and reached \$26.4 billion in 2008, although much of the trade in audiovisual products occurs in the form of rights transactions as the means for buying and selling creative content, for which data is unavailable' (p.124).

European Commission. (2011b) *European Competitiveness Report 2011*. (242 pp.)

[http://ec.europa.eu/enterprise/newsroom/cf/itemdetail.cfm?item\\_id=5702&lang=en&tpa\\_id=1020&title=European-Competitiveness-Report-2011](http://ec.europa.eu/enterprise/newsroom/cf/itemdetail.cfm?item_id=5702&lang=en&tpa_id=1020&title=European-Competitiveness-Report-2011) [24/10/2012]

The *2011 European Competitiveness Report* was prepared in the context of the 'Europe 2020 strategy for smart, sustainable and inclusive growth' and in consideration of its major flagships, in particular, 'An integrated Industrial Policy for the Globalisation Era: Putting Competitiveness and Sustainability at Centre Stage' which was adopted by the Commission in October 2010. The Report looks first at the overall economic performance and its impact on productivity - the key factor for competitiveness in the long run - as well as the role of R&D and innovation in this process. Developments in a number of sectors and topics that are key for the competitiveness of European industry and its economy in general are then analysed. These topics include convergence in knowledge intensive services, the competitiveness of the European space sector, access to non-energy raw materials and EU industry in a context of sustainable growth. Finally, the Report analyses the relationship between the EU industrial and competition policies as well as the changes in this respect that have taken place over the last decade.

European Commission. (2011c) *Green Paper on the online distribution of audiovisual works in the European Union: opportunities and challenges towards a digital single market*, COM (2011) 427 final.

[http://ec.europa.eu/internal\\_market/consultations/docs/2011/audiovisual/green\\_paper\\_COM\\_2011\\_427\\_en.pdf](http://ec.europa.eu/internal_market/consultations/docs/2011/audiovisual/green_paper_COM_2011_427_en.pdf) [24/10/2012]

Green Paper published within the context of the Europe 2020 Strategy, of the Digital Agenda for Europe and of the Commission Communication "A Single Market for Intellectual Property Rights" (the "IPR Strategy"). As identified in the IPR Strategy, while the internet is borderless, online markets in the EU are still fragmented by multiple barriers and a Single Market has still not been achieved. This Green Paper is intended to contribute to the development of a digital single market by launching a debate specifically on the opportunities and challenges of the online distribution of audiovisual works.

European Union - Eurostat. (2011) *Cultural statistics*. Luxembourg : Publications Office of the European Union. (253 pp.)

[http://epp.eurostat.ec.europa.eu/cache/ITY\\_OFFPUB/KS-32-10-374/EN/KS-32-10-374-EN.PDF](http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-32-10-374/EN/KS-32-10-374-EN.PDF) [04/09/2012]

The 2<sup>nd</sup> edition of the Eurostat Cultural statistics pocketbook covers external trade in cultural goods (Chapter 6) with data from 2009 and comparisons with 2004, marking trends and changes in external trade patterns since the first edition published in 2007.



European Music Office. (2007) *Music Export Handbooks*. Brussels: European Music Office.

[http://www.emo.org/ep\\_emp\\_activities.php?type=INFO%20EXCHANGE](http://www.emo.org/ep_emp_activities.php?type=INFO%20EXCHANGE) [10/09/2012]

Export Handbooks for France, Germany, UK, USA, Japan, Brazil, Finland, Spain, Russia and Austria published. Export Handbooks for new countries will also be produced over time.

European Parliament. (2012) *The Culture Strand of the Creative Europe Programme*, Detailed Briefing Note, Directorate General for Internal Policies, Structural and Cohesion Policies, Brussels. (58 pp.)

<http://www.europarl.europa.eu/committees/fr/studiesdownload.html?languageDocument=EN&file=76331> [22/10/2012]

This Detailed Briefing Note provides analytical, conceptual and policy commentary on the proposed Culture Strand of the Creative Europe Programme. It takes into account all available commentary on this Programme from both official sources and a wide range of CCI stakeholders, including published results of consultation and follow up discussions with key actors in the field. The focus is on both the plausibility and cogency of the overall policy architecture and on key points of acknowledged concern. The Note contains recommendations to the European Parliament.

Janssens J. and Magnus, B. (2011) *Travelogue: Mapping Performing Arts Mobility in Europe*. Brussels: Space. (95 pp.)

<http://www.arts-mobility.info/> [07/09/2012]

The *Travelogue* is one of the final outcomes of a 3 year European project (2008-2011) SPACE, a platform dedicated to support the performing arts circulation in Europe. *Travelogue* undertook experimental research in linking and sharing data on international performing arts touring collected by institutions all over Europe. The country profiles give an insight into the import/export patterns for performing arts in Europe.

KEA European Affairs. (2006) *The Economy of Culture in Europe*. Brussels: KEA European Affairs – for the European Commission DG Education and Culture. (355 pp.)

[http://ec.europa.eu/culture/key-documents/economy-of-culture-in-europe\\_en.htm](http://ec.europa.eu/culture/key-documents/economy-of-culture-in-europe_en.htm)

[11/09/2012]

KEA European Affairs carried out this study, working with Media Group (Turku School of Economics) and MKW Wirtschaftsforschung GmbH. The study is a first at European level. It highlights the direct (in terms of GDP, growth and employment) as well as the indirect (links between creativity and innovation, links with the ICT sector, regional development and attractiveness) contribution of the cultural and creative sectors towards the Lisbon Agenda. The report gives brief information on cultural exports for four countries.

KEA European Affairs. (2009) *The Impact of Culture on Creativity. A Study prepared for the European Commission (Directorate-General for Education and Culture)*.

[http://ec.europa.eu/culture/key-documents/doc/study\\_impact\\_cult\\_creativity\\_06\\_09.pdf](http://ec.europa.eu/culture/key-documents/doc/study_impact_cult_creativity_06_09.pdf)

[22/10/2012]

Study on the contribution of culture to creativity prepared for the European Commission (Directorate-General for Education and Culture). It demonstrates the impact of culture and art on creativity, a major factor of economic growth and a vector of social and technological innovation. One of the three main objectives for a European Agenda for Culture is the promotion of culture as a catalyst for creativity in the framework of the Lisbon Strategy for growth and jobs. Through its Communication the European Commission acknowledged the contribution that culture could make to its strategy for innovation. The Commission's terms of reference state that the objective of the study is to help the European Commission: (i) to better grasp the notion of creativity as well as the various factors that can stimulate it; (ii) more particularly to have a better understanding of the effective and concrete contribution of culture to creativity; (iii) to better understand the links between factors that stimulate creativity and culture.

KEA European Affairs and MINES Paris Tech. (2010) *Multi-territory Licensing of Audiovisual Works in the European Union*. Brussels: European Commission. (204 pp.)

<http://www.keanet.eu/en/multiterritory%20licensing%20study.htm> [31/08/2012]

This study was undertaken by KEA and MINES Paris Tech on behalf of the European Commission (DG INFSO). It sets out recommendations to ensure the presence of European films on new digital distribution platforms. It examines the economics of the copyright industries and the specifics of digital delivery in the media market. The report sets out a number of recommendations to enable European AV companies to maximise on the digital shift in the context of the EU's powerful regulatory and support instruments.

KEA European Affairs. (2011) *Mapping the Cultural and Creative Sectors in the EU and China: A Working Paper in support to the development of an EU-China Cultural and Creative Industries (CCIs) Platform*. Brussels: KEA European Affairs. (63 pp.)

<http://www.keanet.eu/report/china%20eu%20creative%20industries%20mapping%20full.pdf> [30/08/2012]

A study carried out for the European Commission's EU-China IPR2 Programme. KEA was commissioned to compile a 'Working Paper Mapping the Cultural and Creative Sectors in the EU and China' in the framework of the 'EU-China Project on the Protection of Intellectual Property Rights' (IPR2). IPR2 is a project funded by the EU and Chinese authorities with the overall objective of supporting China's smooth integration into the World Trading System, and of contributing to its transition to the market economy. The study includes economic data for the CCIs in the EU and China with trade statistics: export of cultural services from the EU 27 to China has grown from € 31m (2004) to € 49m; China became the 3<sup>rd</sup> largest exporter and 6<sup>th</sup> largest importer of cultural goods in 2005. Online games, new media and advertising are the fastest growing creative sectors in China; TV, Radio and publishing are strong sectors and Film and Video are on the rise. The report identifies the main regulatory provisions governing the cultural and creative sectors in China, those related to IPR and regulations on foreign business activity (e.g. film quotas). There is a comprehensive database of key stakeholders in the cultural and creative sectors in the EU and China.



KEA European Affairs. (2012) *Measuring Economic Impact of CCIs Policies*. Brussels: KEA European Affairs – for CRE.ARE Creative Regions network. (78 pp.)

[http://www.keanet.eu/docs/measuring-economic-impact-of-ccis-policies\\_final\\_create.pdf](http://www.keanet.eu/docs/measuring-economic-impact-of-ccis-policies_final_create.pdf)

[31/08/2012]

This study was commissioned by the INTERREG IVC CREA.RE network (Creative Regions: The European network of local and regional authorities for the better involvement of cultural and creative industries in EU regional programmes), who asked KEA to create a benchmarking raster (the raster), or a set of indicators, to measure policies focusing on local economic development through CCIs. CREA.RE comprises 12 local and regional public authorities from 10 different EU countries. It aims to better involve the creative sectors in the development of European regions and urban centres. Several of the good practices of support measures across Europe featured in the study document different forms of export

Media Consulting Group. (2009) *The Potential for Cultural Exchanges between the EU and Third Countries: the case of China*. Strasbourg: European Parliament – Directorate General for Internal Policies. (126 pp.)

<http://www.europarl.europa.eu/committees/en/studiesdownload.html?languageDocument=EN&file=26308> [07/09/2012]

This study provides an overview of the cultural sector in China, and describes the current state of cultural exchanges between the EU and its Member States and China. It concludes by providing ideas for policymakers on how such exchanges can be strengthened. China is taken here as a test case for the EU's cultural policy towards third countries in general. This study addresses both cultural exchange and export (including markets, trade legislation and other business issues for CCIs).

PRACTICS & On the Move. (2011) *Guide to Funding Opportunities for the International Mobility of Artists and Culture Professionals in Europe*. Brussels: PRACTICS, On the Move & Interarts. (410 pp.)

<http://on-the-move.org/files/Guide%20funding%20for%20mobility.pdf> [27/08/2012]

This comprehensive guide to grants for mobility includes many examples of grants for market development and event participation (e.g. attending trade fairs). Listings are presented by EU Member States, Candidate Countries and EFTA members, as well as European initiatives and other links to networks and relations with third countries.

Sacco, P. L. (2011) 'Culture 3.0: A new perspective for the EU 2014-2020 structural funds programming'. Produced for the OMC Working Group on Cultural and Creative Industries on behalf of the European Expert Network on Culture.

[http://www.eenc.info/wp-content/uploads/2011/07/pl-sacco\\_culture-3-0\\_CCIs-Local-and-Regional-Development\\_final.pdf](http://www.eenc.info/wp-content/uploads/2011/07/pl-sacco_culture-3-0_CCIs-Local-and-Regional-Development_final.pdf) [22/10/2012]

Based on the argument that 'in spite of the multiplication of successful examples of culture-led local and regional development across Europe and elsewhere ... there is a widespread perception that the role and potential of culture in the overall European long-term competitiveness strategy is still seriously under-recognized', this commissioned paper

argues for a new form of recognition of 'Culture 3.0' as a still tentative and emergent stage in the development of the cultural field as characterised by 'the pervasiveness of culture, which ceases to be a specific form of entertainment to become an essential ingredient of the texture of everyday life'. Nowhere is this clearer than in the massive transformations in the 'culture cycle' or value production chain of creativity, expression, production and reproduction, marketing and distribution and, above all, consumption of cultural content, product, experience and value being wrought by the 'digital shift'.

TERA Consultants. (2010) *Building a Digital Economy: The importance of saving jobs in the EU's creative industries*. Paris: TERA Consultants. (68 pp.)

<http://www.droit-technologie.org/upload/dossier/doc/219-1.pdf> [22/10/2012]

The first EU-based study to measure both the economic contributions of the creative industries and the economic losses due to piracy, primarily digital piracy. This study also differs from earlier research by using a more accurate and comprehensive definition of Europe's creative industries, one that expands the EU definition of core creative industries and also encompasses the economic contributions of non-core creative industries. These non-core creative industries are suppliers to and customers of the core creative industries, and their economic strength is heavily dependent upon the core industries. The study focuses primarily on the effects of digital piracy, which refers to various forms of online piracy, including file-sharing via peer-to-peer (p2p) networks. Digital piracy is growing rapidly and accounts for the majority of economic losses to the creative industries.

Various authors. (2010) *Towards a Pan-European initiative in support of innovative creative industries in Europe*.

[http://www.europe-innova.eu/web/guest/home/-/journal\\_content/56/10136/178407](http://www.europe-innova.eu/web/guest/home/-/journal_content/56/10136/178407)

[04/09/2012]

Reports and presentations on the economic importance of the creative industries for growth and innovation at the workshop (4-5 February 2010, Amsterdam) organised by the European Commission DG Enterprise and Industry, in cooperation with the City of Amsterdam, European Design Centre, Association of Dutch Designers & IIP Create.

Whicher, A. & Cawood, G. (2011) *Reviewing Innovation and Design Policies across Europe: SEE Report 2011*. Cardiff: Design Wales & Cardiff Metropolitan University. (24 pp.)

<http://www.seeplatform.eu/docs/SEE%20Design%20Policy%20Monitor%202011%281%29.pdf> [29/08/2012]

A report from the ERDF funded SEE network (Sharing Experience Europe) presenting the findings from the 'SEE – Design Policy Monitor' review of innovation and design policies and programmes in the partner countries and regions. The report identifies 17 EU Member States with a policy vision for design in 2011. The statements provide insight into government visions for design – most being fairly narrowly related to industrial design and product development. The study positions the countries on the Design Policy Ladder, a tool developed by the Danish Design Centre to identify the level of strategic importance attributed to design.

Working Group of EU Member States Experts (OMC). (2012) *Policy Handbook on how to strategically use the EU support programmes, including Structural Funds, to foster the potential of culture for local, regional and national development and the spill-over effects on the wider economy?* European Agenda for Culture, Work Plan for Culture 2011-2014. (42pp.) <http://ec.europa.eu/culture/our-policy-development/documents/120505-cci-policy-handbook.pdf> [24/10/2012]

The objective of the *Policy Handbook* is to better sensitise local, regional and national authorities, as well as the cultural community, of the potential of cultural and creative industries in boosting regional and local development. The Handbook intends to help them formulate local, regional and national strategies for cultural and creative industries. It also aims to serve as a tool for the planning and implementation of a strategic use of the EU support programmes, including the Structural Funds, to foster the potential for local, regional and national development and the spill-over effects on the wider economy. Contains useful examples of good practice relating to CCI exports in several Member States.

## **Nordic region**

Fleming, T. (2007) *A Creative Economy Green Paper for the Nordic Region*. Oslo: Nordic Innovation Centre. (68 pp.)

[http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/a\\_creative\\_economy\\_green\\_paper\\_for\\_the\\_nordic\\_region3.pdf](http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/a_creative_economy_green_paper_for_the_nordic_region3.pdf) [23/08/2012]

This Green Paper commissioned by the Nordic Innovation Centre (NICE) is the first stage of strategic development for a pan-Nordic policy to developing and promoting the Creative Industries of the Nordic region. It identifies strengths in the region, looks at different Nordic approaches to data collection and notes that the current domestic Nordic market is too small for its CCI products and services. Four Key Themes are identified: Entrepreneurialism and Creativity; Growing Creative Businesses; Building Creative Clusters; Building Creative Places. A key recommendation – for export and internationalisation of CCIs – is for a credible “Nordic Creative brand” in order to develop the sector’s profile abroad and nurture global markets more effectively. The launch of a Nordic creativity campaign in target sectors at world trade shows would coordinate a strategic approach to global markets, in particular in the BRIC economies. The report summarises the main issues and opportunities for the Nordic Creative Economy with a strong message on the need for re-positioning: “If the Nordic region is to retain its long-held competitive advantage in creativity, it needs to reposition itself as a knowledge broker and connector for the global creative economy, using its collective knowledge and intelligence to build effective global creative partnerships and trading relationships”.

Masalin, H. (2011) *Mapping of Nordic Creative and Cultural Industries Financial Environment*. Copenhagen: Nordic Council of Ministers: KreaNord. (39 pp.)

[http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/mapping\\_of\\_nordic\\_creative\\_and\\_cultural\\_industries\\_-\\_mapping\\_pa\\_finansiering\\_rapport.pdf](http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/mapping_of_nordic_creative_and_cultural_industries_-_mapping_pa_finansiering_rapport.pdf)

[23/08/2012]

This mapping report was commissioned from CIM Creative Industries Management Ltd by KreaNord, the Nordic platform under the Nordic Council of Ministers established to initiate joint-Nordic CCI development activities and to improve the growth prospects for the region's cultural and creative industries. The report examines the access to finance for Nordic creative economy and CCI businesses. It concludes that the financial environment for Nordic CCIs provides the same access as for other types of business and that the supply of project finance for CCIs is rare or non-existent. It recommends that KreaNord takes an initiative to draft a development process and an initial concept for a Nordic Creative Economy Debt Finance Facility and invites Nordic Innovation, innovation agencies and special finance institutions to consult the draft concept and its implementation. The study acknowledges the financial facility proposed as part of Creative Europe 2014-2020 and recommends the design and launch of a Nordic financial instrument, focused on projects and processes. The mapping report is part of the KreaNord joint initiative under the Nordic Ministers of Business Affairs and Ministers of Culture project and the policy area adopted in 2010 by the ministers, which aims to contribute to facilitating Nordic CCIs to reach global markets, access finance and network and gain commitments internationally.

NOMEX. (2010) *Strength in Unity*. Copenhagen: NOMEX. (36 pp.)

<http://nordicmusicexport.com/news/2-front-page> [23/08/2012]

Following annual meetings of the music export offices from the Nordic countries, in 2010 NOMEX was formalised as a common platform for the five export offices, aiming to strengthen the positioning of Nordic Music in the global market and create a brand for Nordic Music. KreaNord funded the first two years of pilot projects. The Nordic Music Export Programme 'Strength in Unity' for 2011-2015 was written.

NOMEX. (2011) *Nordic Music Export Programme: Final Report for 2010*. Copenhagen: NOMEX. (65 pp.)

[http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/10-00236-17\\_nomex\\_final\\_report\\_2010\\_539394\\_1\\_0.pdf](http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/10-00236-17_nomex_final_report_2010_539394_1_0.pdf) [23/08/2012]

NOMEX. (2012) *Nordic Music Export Programme: Final Report for 2011*. Copenhagen: NOMEX. (20 pp.)

[http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/10-00236-22\\_nomex\\_final\\_report\\_2011\\_fin.pdf\\_565359\\_1\\_1.pdf](http://www.server003.b14cms.dk/users/kreanord.org/www/sites/default/files/rapport/10-00236-22_nomex_final_report_2011_fin.pdf_565359_1_1.pdf) [23/08/2012]

Two annual reports presenting the activities of the first two pilot years. In 2012, with funding from the Nordic Council of Ministers, a full-time NOMEX Programme Director was appointed. NOMEX now works on regular projects, including showcases and training programmes. The activity focuses on Strand 1 of the 'Strength in Unity' programme (Strengthening the intra-Nordic market). Developing collaborative relationships with travel industry companies to benefit artists, promoters and music fans, and activity in the Nordic media will help build awareness of original contemporary music from all five countries. Showcases will be piloted

in London, Tokyo and Madrid. NOMEX aims to raise the necessary finance to implement the other two strands of the export strategy: Promoting the Nordic region internationally & Training, capacity building and services (including data collection).

Norden. (2006) *Norden – a Creative Powerhouse*. Copenhagen: Nordic Innovation Centre. (20pp.) <http://www.nordicinnovation.org/Global/Publications/Reports/2006/Norden%20-%20a%20Creative%20Powerhouse.pdf> [22/10/2012]

This report deals with the creative industries from an industrial and economic perspective: taking its point of departure in research on industrial competitiveness and transformation (business strategy, institutional and evolutionary economics etc.) in general and modern research in particular. The aim was to produce a series of policy recommendations and concrete measures to help the creative industries further develop. The approach has been to separate from cultural or artistic appraisals of creativity, and to focus only on these activities as commercial and industrial endeavours. As a result, non-profit cultural/creative organisations are not generally included. Creative industries thinking reflects an attempt to widen the debate on the value of culture in policy, away from a traditional focus on cultural policy as funding for fine arts and heritage institutions.

Nordisk Film & TV Fond. (2011) *High Five 2010/2011 Report, Film: Culture & Innovation Industry, Results of the globalisation fund's grant for international promotion & sales of Nordic films*. (12 pp.)

[http://www.nordiskfilmogtvfond.com/managed\\_assets/files/high5ukwebaw.pdf](http://www.nordiskfilmogtvfond.com/managed_assets/files/high5ukwebaw.pdf) [25/08/2012]

The Nordic Council of Ministers awarded an additional grant of DKK 7m (€ 940k) to the Nordisk Film & TV Fond for the period 2010-2012, earmarked as a Globalisation Fund. This report (the final report is due in 2013 when all High Five label initiatives are completed) presents the results for the first phase. Funds were distributed as follows:

- DKK 4m: High Five International Cinema Distribution Support, plus a report on the BRIC countries as a potential future action area
- DKK 2m: Digital Media / VOD
- DKK 1m: Master classes

International Cinema Distribution Support grants resulted in High Five promotions at film festivals in Berlin, Cannes & Toronto. Additional sales of 15-20% were reported. Other grants went to minimum guarantee advances and other international dissemination mechanisms. The film industry strongly supported an extension of the grant: "High Five Cinema gives Nordic films a culturally necessary and financially lucrative competitive edge in an increasingly tough international market". However, no additional funding was awarded in 2012. Other project grants went to develop cross-media quality content for Nordic children (High Five Kids), with successful results reported. Progress was made with the VOD investment, through a partnership with the American VOD distributor Eurocinema and plans to develop VOD initiatives in other countries (BRIC, Turkey & Mexico). The report on the BRIC countries is due to be published late 2012.



Power, D. & Jansson, J. (2006) *Creative Directions – a Nordic framework for supporting the creative industries*. Oslo: Nordic Innovation Centre. (40 pp.)

<http://www.nordicinnovation.org/Global/Publications/Reports/2006/Creative%20Directions.pdf> [25/08/2012]

Dealing with the creative industries from an industrial and economic perspective, this report addresses the competitiveness and transformation potential of the Nordic creative industries. The identification of common export strategies and coordinated Nordic branding based on quality, innovation and creativity (rather than a particular design or aesthetics) are among the recommendations from this study, in order to reach wider markets for Nordic creative industry products. The report was part of the NICE creative industries project that led to the commissioning of the *Creative Economy Green Paper* by Tom Fleming in 2007 (see above).

## EU Member States

### Austria

creativ wirtschaft austria (2010) *Vierter Österreichischer Kreativ Wirtschaftsbericht*. Vienna: creativ wirtschaft austria (204 pp.)

<http://m.bmwfj.gv.at/Presse/AktuellePresseMeldungen/Documents/Vierter%20Kreativwirtschaftsbericht.pdf> [11/09/2012]

The Fourth Report on Austria's Creative Industries is in German with English summary. One in ten Austrian companies belongs to the creative industries. According to the definition used in the *Vierter Kreativwirtschaftsbericht*, this sector includes architecture, design, advertising, television & radio, software & games, publishing, video & film as well as music, books & arts. More than 127,000 employees work for approximately 36,100 operating creative companies. With a share of 2.6% of the overall turnover the relevance of Austria's creative industries for the country's economy is equal to that of civil engineering and higher than that of tourism (2.0%). Austrian creative industries are surprisingly export-oriented (with an export ratio of 26% in 2009). Almost half the enterprises of the creative industries have customers outside Austria, while 10% focus mainly on exports.

### Bulgaria

WIPO. (2007) *The Economic Contribution of Copyright-based Industries in Bulgaria*. Sofia (146 pp.)

[http://www.wipo.int/ip-development/en/creative\\_industry/pdf/1009E-4.pdf](http://www.wipo.int/ip-development/en/creative_industry/pdf/1009E-4.pdf) [13/09/2012]

This research project was assigned by the Ministry of Culture to a working group of experts with technical assistance of WIPO (World Intellectual Property Organisation). It is the first comprehensive study of the field and proposes that, with adequate public support, the sector could achieve economic growth.

## Denmark

Kunst – Danish Arts. (2010) *Extracts from the Danish Government's strategy on cultural exchange – 'Styrket internationalisering af dansk kulturliv'* Copenhagen. (27 pp.)

[http://www.kunst.dk/fileadmin/user\\_upload/dokumenter/Internationalt/EXTRACTS\\_IN\\_ENGLISH\\_Aug\\_2010x.pdf](http://www.kunst.dk/fileadmin/user_upload/dokumenter/Internationalt/EXTRACTS_IN_ENGLISH_Aug_2010x.pdf) [13/09/2012]

An interesting overview of the background to the current internationalisation strategy for Danish culture. The extracts published in English note the earlier policies of cultural export (late 1980s), exchange and dialogue (1990s) and place the new strategic direction and policy management for internationalisation of Danish culture in a wider context.

The Danish Enterprise and Construction Authority. (2011) *The Vision of the Danish Design 2020 Committee*. Copenhagen: Danish Enterprise and Construction Authority. (66 pp.)

[http://www.ebst.dk/publikationer/ER/The\\_Vision\\_of\\_the\\_Danish\\_Design\\_2020\\_Committee/index.htm](http://www.ebst.dk/publikationer/ER/The_Vision_of_the_Danish_Design_2020_Committee/index.htm) [29/08/2012]

The Danish government expects design to become an even more powerful driver of innovation in the future. In the autumn of 2010, it asked a group of six people to articulate a vision for the future – “Design 2020”. The purpose was to suggest how design can be strengthened and used in order to contribute to growth, productivity, and innovation – areas in which Denmark faces substantial challenges. The Design2020 Committee presents its overall vision for design in 2020 in this paper. Chapter 6 deals with the Branding of Design from Denmark: “if Denmark is to become known as the design society in 2020, it is necessary to develop further and brand the unique Danish design DNA in order to differentiate us from other countries with strong design heritages, such as Finland, the Netherlands, the UK, Singapore, and Korea”.

The Danish Government. (2007) *DesignDenmark*. Copenhagen: The Danish Government. (20 pp.) <http://www.erhvervsstyrelsen.dk/file/7260/designdenmark.pdf> [29/08/2012]

The Government presented a white paper on the direction for design policy in Denmark. Its vision is for Denmark to be restored to the international design elite. It seeks to boost exports through the DesignDenmark initiative. The report notes that between 1995 and 2005, the Danish design industry's exports increased six-fold and in 2007 amounted to just under DKK 800 million, while individual businesses were becoming increasingly internationalised. It acknowledges Danish design's great potential on the international scene. However, it also states that the design industry is made up of many small businesses that lack experience of the international aspect – of exporting abroad or trading with international customers or of establishing activities abroad. This makes it essential to support the internationalisation of such design businesses. The proposed initiatives are presented here: <http://www.erhvervsstyrelsen.dk/threechallenges>. The Danish Design 2020 Committee vision paper (see above) was commissioned in 2010, to focus on the long-term challenges.



Tscherning, R.W. and Boxenbaum, E. (2012) *What do the Creative Industries need? - Barriers and Possibilities for Growth in the Creative Industries in Denmark*. Roskilde: CKO – Center for Culture and Experience Economy. (15 pp.)

[http://cko.dk/sites/default/files/needs\\_analysis\\_.pdf](http://cko.dk/sites/default/files/needs_analysis_.pdf) [11/09/2012]

This research analyses the barriers and possibilities for growth in the creative industries in Denmark. It was conducted by the Center for Culture and Experience Economy in 2011. It compares the creative industries with the wider industry community in order to evaluate differences; assesses the demand for business support for creative industry companies and uncovers the market for creative services in other industries. It finds that over 20% of CCI businesses surveyed believe that export promotions with an industry focus are likely to have a positive effect (although other proposed business support services rate higher).

## Estonia

Estonian Ministry of Culture. (2011) *Creative Industries in Estonia, Latvia and Lithuania*. Tallinn: Estonian Ministry of Culture, with the support of the British Council. Partners: Latvian Ministry of Culture, Lithuanian Ministry of Culture, Creative Estonia. (48 pp.)

[http://www.looveesti.ee/attachments/141\\_Creative\\_Industries\\_2011.pdf](http://www.looveesti.ee/attachments/141_Creative_Industries_2011.pdf) [29/08/2012]

The report maps creative industries in the three Baltic countries and identifies issues of different data collection methods and definitions. There are some mentions of export strategy and general business development support measures. Key support bodies are identified in good examples.

Enterprise Estonia with Creative Estonia, Estonian Ministry of Culture and Ministry of Economic Affairs. (2011) *The Tallinn Manifesto*. (16 pp.)

[http://www.looveesti.ee/creative-entrepreneurship/materials/The\\_Tallinn\\_Manifesto.pdf](http://www.looveesti.ee/creative-entrepreneurship/materials/The_Tallinn_Manifesto.pdf) [22/10/2012]

*The Tallinn Manifesto* calls for a re-think in how we approach creative entrepreneurship for a competitive economy. It sets out an agenda for a refreshed and re-invigorated approach to knowledge development, collaboration, strategy and policy – across Europe and internationally. It introduces a set of themes which will help different localities to maximise their distinctive potential; and it frames questions we all need strong answers for if we are serious about developing a Creative Economy which is productive, value-adding, sustainable, resilient, inclusive and fair. It does this from the specific perspective of emerging markets – to bring the ‘margins’ to the ‘centre’ so that a new wave of nations, regions and cities are able to develop genuinely productive Creative Economies on their own terms.

## Finland

Arts Council of Finland. (2007) *ARSIS 3/07 – Finnish Cultural Exports*. Helsinki: Arts Council of Finland. (50 pp.) <http://www.taiteenkeskustoimikunta.fi/en/web/tkt/frontpage> [10/09/2012]

A special English-language issue of the Arts Council of Finland’s ARSIS magazine dedicated to the theme of Finnish Cultural Exports. The magazine looks at the Finnish cultural export

project from different perspectives: government ministries, networks, artists and art information centres.

Media Clever. (2011) *The Market Value and Structure of Finnish Music Exports in 2010*. Helsinki: Music Finland. (15 pp.) Study in Finnish (English translation pending).

[http://musicfinland.fi/en/media/documents/Viennin\\_markkina\\_arvo2010.pdf](http://musicfinland.fi/en/media/documents/Viennin_markkina_arvo2010.pdf) [25/08/2012]

The report finds that the overall value of Finnish music exports in 2010 was 34.5m €. Compared to the previous year, this represented a growth of nearly 7%. The value of exports is divided into sales of goods (59%), sales of services (24%) and copyright royalties (17%). A substantial increase in sales of goods is recorded (20.1m €) compared to 2008 (6.5m €) and there has been a small decrease in export income from services and copyright since 2008. The main export countries for 2008-2010 were German-speaking Europe, Nordic countries, UK, France, Benelux and the USA. Japan is the main target for export in Asia. This is the 7<sup>th</sup> in a series of Finnish music market analysis reports. The 2004-2008 reports (in English) were commissioned by Music Export Finland (under Documents: <http://www.musex.fi/en/about/>).

Koivunen, H. (2005) *Staying Power to Finnish Cultural Exports*. Helsinki: Ministry of Education. (153 pp.)

[http://www.minedu.fi/OPM/Julkaisut/2004/onko\\_kulttuurilla\\_vientia\\_opetusministerion\\_ulkoasainminister?lang=en](http://www.minedu.fi/OPM/Julkaisut/2004/onko_kulttuurilla_vientia_opetusministerion_ulkoasainminister?lang=en) [10/09/2012]

This study collects a range of data on the present state in 2005 of Finland's cultural exports. It makes recommendations for measures to promote cultural exports and to create more favourable conditions for cultural exports. The report contains a brief overview of cultural export strategies in Sweden, Norway, Denmark, the United Kingdom, Ireland, France, Germany, United States, Canada, Australia and Japan.

Ministry of Education. (2008) *Powering up Finnish cultural exports*. Helsinki: Ministry of Education. (26 pp.)

<http://www.minedu.fi/export/sites/default/OPM/Julkaisut/2008/liitteet/opm43.pdf?lang=en> [10/09/2012]

This report presents the Programme for Cultural Export Promotion 2007-2011, drawn up by the Working Group for the Development of Cultural Exports. The vision of the programme was: 'Cultural exports will have grown into an acknowledged part of Finnish exports. 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. They will also have created new jobs. Culture will form a distinctively more pronounced part of Finland's country image and brand. The economic welfare of individuals and groups working in cultural sectors will have improved through cultural exports.' The Working Group decided that entrepreneurship, clusters and networks, international marketing and promotion, structures promoting cultural exports and the knowledge base, international cultural cooperation as well as a competitive legal operating environment should be developed. The Programme would primarily make

use of existing structures and it was estimated that in total, some € 228 million would be allocated to the implementation of the Cultural Exports Programme between 2007 and 2011.

Ministry of Education. (2011) *Cultural Exportation Report 2008*. Helsinki: Ministry of Education. (67 pp.) Note: the Finnish language version of this report was published in 2009.

<http://www.minedu.fi/export/sites/default/OPM/Julkaisut/2011/liitteet/OKM05.pdf?lang=fi>

[10/09/29012]

This mid-term evaluation of the implementation of the Cultural Export Promotion Programme 2007-2011 finds that the Programme is serving its purpose. It finds that the majority of measures taken to promote cultural exportation in 2008 targeted the first development action (Business development), aiming to increase business competence, strengthen growth and internationalisation, R&D and innovation actions, as well as producers and intermediaries. It notes an increasingly strategic approach to the development of cultural exportation, by different industry organisations, arts information centres and Finnish cultural institutes abroad. It finds a weakness in the intermediary tier (production, distribution and agency activities) which is a structural problem, making it more difficult to find a meeting point between supply and demand, and will examine ways of strengthening the intermediary tier.

Ministry of Education and Culture. (2012) *Cultural exportation is visible, leads to renewal and has an impact*. Helsinki: Ministry of Education and Culture. (44 pp.)

<http://www.minedu.fi/export/sites/default/OPM/Julkaisut/2011/liitteet/OKM31.pdf?lang=fi>

[07/09/2012]

The final report for the Cultural Export Promotion Programme 2007-2011 assesses the implementation and results of the programme. It states that cultural exportation has become more streamlined and a natural part of the business of more and more companies in the sector, although the “ambitious goal” of tripling the value of cultural exports had not been achieved. It observes that the packaging, marketing and branding needs of companies engaged in cultural export in Finland under the Programme far exceeded the resources allocated. The Programme worked as a platform for strategic and practical cooperation between the Ministry of Education and Culture, Ministry of Employment and the Economy and the Ministry for Foreign Affairs, while other ministers have been involved in a joint steering committee. The report concludes with a proposal for a cultural exportation promotion policy in the Government term of office 2011-2015.

Ministry of Employment and the Economy. (2008) *Development Strategy for the Creative Economy in Finland 2009-2010*. Helsinki: Ministry of Employment and the Economy. (English summary: 2 pp.)

[http://www.tem.fi/files/23175/TEM\\_luovatalous-esiteEN.pdf](http://www.tem.fi/files/23175/TEM_luovatalous-esiteEN.pdf) [07/09/2012]

The Government set a goal for creative enterprises to be involved in more extensive and profitable business operations in the future, both in Finland and in international markets. In order to achieve this, the Ministry of Employment and the Economy established a two-year Development Strategy for the Creative Economy. The purpose of the project was to develop the operating environment of the creative enterprises, evolve new product development and

financing models, and to improve the effective use of creative work and expertise in the labour market. One of the targets was to improve opportunities for growth and internationalisation for SMEs in creative fields.

Säpyskä, M. (2009) *Klub Tampere – Experiences from culture export to St. Petersburg*. Tampere: The Baltic Institute of Finland. (14 pp.)

[http://www.creativecompass.fi/kuvat/19112009/minna\\_sapyska.pdf](http://www.creativecompass.fi/kuvat/19112009/minna_sapyska.pdf) [07/09/2012]

Powerpoint presentation on the Klub Tampere cultural export project (2008-2011), managed by the Baltic Institute of Finland, taking music, art and design from Tampere into the Russian market, focused on St Petersburg. Klub Tampere was financed by Creative Tampere.

## France

Ministère des Affaires Etrangères. (2007) *Agreement between the Governments of France and the United Arab Emirates on the Universal Museum of Abu Dhabi*.

[http://www.agencefrancemuseums.fr/fichier/s\\_paragraphe/897/paragraphe\\_file\\_1\\_en\\_decret\\_portant\\_publication\\_de\\_l\\_accord\\_intergouvernemental.pdf](http://www.agencefrancemuseums.fr/fichier/s_paragraphe/897/paragraphe_file_1_en_decret_portant_publication_de_l_accord_intergouvernemental.pdf) [11/09/2012]

The intergovernmental agreement on the establishment of the Louvre Abu Dhabi Museum sets out the conditions (including a commitment by France not to engage in any other such project with another Emirate state, Saudi Arabia, Kuwait, Oman, Bahrain, Iran, Iraq, Egypt, Syria, Qatar, Jordan and Lebanon while the 20-year agreement remains in force). A large budget is committed to the project by the UAE Government, including € 400m for the use of the Louvre 'brand' name, as well as separate budgets for temporary exhibitions, loans of works, museum construction etc. The project management is carried out by Agence France-Muséums (<http://www.agencefrancemuseums.fr/>).

Ministère des Affaires Etrangères et Européennes. (2010) *External Action in the Audiovisual Media*. Paris: Ministère des Affaires Etrangères et Européennes – Directorate General of Global Affairs, Development and Partnerships. (12 pp.)

[http://www.diplomatie.gouv.fr/en/IMG/pdf/External\\_Action\\_Audiovisual\\_Media.pdf](http://www.diplomatie.gouv.fr/en/IMG/pdf/External_Action_Audiovisual_Media.pdf)

[11/09/2012]

Presents the French audiovisual media action and policy abroad, including statistics for the French foreign film market, broadcasting initiatives and budgets for external action.

Ministère des Affaires Etrangères et Européennes / Ministère de la Culture et de la Communication. (2008) *Rapport Jobbé-Duval*. Paris. (22 pp.)

[http://www.diplomatie.gouv.fr/fr/IMG/pdf/RAPPORT\\_JOBBE\\_DUVAL.pdf](http://www.diplomatie.gouv.fr/fr/IMG/pdf/RAPPORT_JOBBE_DUVAL.pdf) [13/09/2012]

Report (in French) into measures to improve the participation of France in international artistic dialogue in the visual arts field. A workshop on Export was one of the consultation measures which resulted in a number of recommendations.

## Germany

Fesel, B. (2007) *Kulturwirtschaft in der Auslandsförderung von Kultur*. Bonn: German Commission for UNESCO. (120 pp.)

<http://www.unesco.de/index.php?id=1620> [10/09/2012]

Report (in German) on the cultural and creative industries and the international relations/promotion of culture abroad. The study contains information on how some sectors of the German CCIs are promoted abroad.

Fesel, B. and Sönderman, M. (2007) *Culture and Creative Industries in Germany*. Bonn: German Commission for UNESCO. (42 pp.)

<http://www.unesco.de/index.php?id=1622> [10/09/2012]

A booklet on the cultural and creative industries in Germany, with definitions, sector turnovers and analysis. No special attention is paid to export activity though the importance of international CCI fairs and trade events in Germany is underlined.

## Italy

Sacco, P., Sturabotti, D. et al. (2011) *L'Italia che verrà - industrie culturali, made in Italy e territory*. Rome: Unioncamere & Fondazione Symbola. (216 pp.)

<http://www.unioncamere.gov.it/download/1043.html> [10/09/2012]

Research report (in Italian) into the economy of the cultural and creative industries in Italy, with export data derived from the local chambers of commerce.

## Latvia

*Creative Industries in Estonia, Latvia and Lithuania.*

See under Estonia

## Lithuania

*Creative Industries in Estonia, Latvia and Lithuania.*

See under Estonia

## Malta

Creative Economy Working Group, Ministry of Finance, the Economy and Investment, Ministry of Tourism, Culture and the Environment. (2012) *Creativity Works: A report on Malta's Creative Economy and a Strategy for the Cultural and Creative Industries*.

<http://www.creativemalta.gov.mt/> [22/10/2012]

A key objective of this new strategy is 'to position Malta as an attractive, contemporary and stimulating creative hub within the Mediterranean region, with strong emphasis on exchange and access to international markets'. (p.3) The document notes that exported cultural and creative goods and services in Malta rose at a considerable annual average growth rate of over 60% (2004-2008) with the main sectors driving growth being audiovisual services,

advertising and architectural services. The document also notes ‘the importance of tourism and export penetration for the growth of the CCIs’ (p.7), increases in cultural creative exports set against a general decline in exports in the economy overall, and ‘further scope for the exploitation of export markets’ (p.9) together with a commitment to ‘Developing programmes and initiatives that export Malta’, creative professionals and works through international expos, fairs, festivals, pitching etc. (p.11).

## Netherlands

Netherlands Government. (2011) *To the Top*. Policy Document (in Dutch)

<http://www.government.nl/issues/enterpriseurship-and-innovation/investing-in-top-sectors/creative-industry> [24/02/2012]

The government has earmarked the creative sector as a top sector in view of its current strong position and scope for growth. The government, industry and science will target investment in this sector. A top team has been created for each top sector. Actions are taken by the government and the sector together. The creative industry must reorganise and connect with other top sectors to be able to join the world top by 2020. In order to realise this, the government supports the establishment of the Dutch Creative Industries Council (D-CIC). This Council coordinates the implementation of the action plan according to the golden triangle principle (collaboration between the industry, knowledge institutes and the government). The government has created an annual fund of €250,000 for this purpose.

All government measures are set out in the [To the Top policy document](#) (in Dutch).

Netherlands Ministry of Economics Affairs: Agency for international Business and Cooperation (EVD). (2005) *International opportunities for the creative industries*. Amsterdam: SEO economisch onderzoek. (35 pp.)

[http://www.seo.nl/uploads/media/821\\_International\\_opportunities\\_for\\_the\\_creative\\_industries.pdf](http://www.seo.nl/uploads/media/821_International_opportunities_for_the_creative_industries.pdf) [22/10/2012]

The Agency for International Business and Cooperation (EVD) of the Ministry of Economic Affairs commissioned SEO Economic Research to conduct a study into the degree of internationalisation of two sectors of the Dutch economy: the ICT sector and the creative industries. The aim of this study is to quantify – as far as the data allow – the relationships these sectors have with other economies, in particular the economy of the United States of America. To this end this report follows a detailed delineation of the creative industries on a 5-digit SBI-level, which was constructed for a research programme concerning the economic effects of culture and creativity. The national economic importance of the creative industries is sketched, after which the available data on internationalisation are scrutinised.

Dutch Design Fashion Architecture. (2009-2012) *Research and Mappings* [various market reports] <http://www.dutchdfa.com/about/publications/research> [11/09/2012]

The Dutch DFA programme has undertaken in depth research, published in English and available free online, into its targeted overseas markets for Dutch creative industries (principally design, fashion and architecture). Reports available include:



- *Design in China Mapping* (2012)
- *Fashion in China Mapping* (2012)
- *Opportunities in the German market* (2011)
- *Introduction to German creative sector infrastructure* (2011)
- *Design Dossier Germany* (2010)
- *Mapping India* (2010)
- *Image study of Dutch design in China and India* (2009)
- *Mapping creative industries China* (2009)

SICA. (2012) *Buitengaats | Offshore - Export of Dutch cultural activities 2011* Amsterdam: SICA. (2 pp.)

[http://www.sica.nl/sites/default/files/the\\_art\\_of\\_exporting\\_2011.pdf](http://www.sica.nl/sites/default/files/the_art_of_exporting_2011.pdf) [11/09/2012]

A poster with map visualisation and statistics for the worldwide export of Dutch cultural activities in 2011. The analysis looks at volume of exports rather than economic value and finds that music represents by far the largest share. Western Europe is the main focus for Dutch cultural exports with nearly three-quarters of total exports and the USA is the main export partner outside Europe (4%).

## Spain

Catalunya Vanguardista. (2008) *Aprendiendo a exportar*. Barcelona: La Vanguardia. (12 pp.)

[http://www.catalunyavanguardista.com/catvan/media/pdf/08\\_aprendiendo\\_a\\_exportar.pdf](http://www.catalunyavanguardista.com/catvan/media/pdf/08_aprendiendo_a_exportar.pdf) [13/09/2012]

A special issue (in Spanish) on exporting cultural content from Catalonia to the world.

Fundación Ideas. (2012) *Las Industrias Culturales y Creativas*. Madrid: Fundación ideas. (118 pp.)

[http://www.fundacionideas.es/sites/default/files/pdf/I-Las\\_industrias\\_culturales\\_y\\_creativas-Ec.pdf](http://www.fundacionideas.es/sites/default/files/pdf/I-Las_industrias_culturales_y_creativas-Ec.pdf) [14/09/2012]

Analysis of the cultural and creative industries in Spain. Recommendations include developing “cultural multi-localisation” – a pathway for CCIs to move from the local to the global market.

Ministry of Culture. (2011) *Plan de Fomento de las Industrias Culturales y Creativas 2011*. Madrid: Ministerio de Cultura. (74 pp.)

<http://www.calameo.com/read/0000753350b1ce9d39fb9> [13/09/2012]

The Development Plan for the cultural and creative industries in Spain includes various internationalisation elements: Culturex grants for young cultural professionals to attend major international festivals and trade fairs in Europe; ICO-Industrias Culturales is a loans scheme to improve capacity, including internationalisation strategies of cultural industries.

Noya, J. (2007) *La Imagen de España en China [The Image of Spain in China]*, Madrid: Real Instituto Elcano. (392 pp.)



[http://www.realinstitutoelcano.org/wps/portal/rielcano/Pub\\_LibrosElcano](http://www.realinstitutoelcano.org/wps/portal/rielcano/Pub_LibrosElcano) [23/02/12]

This study in Spanish, researched by Spanish and Chinese teams in 2006, was published by the Real Instituto Elcano, one of Spain's leading think-tanks in international relations. The Year of Spain in China 2007, Spain's first major action of public diplomacy in China, triggered the research which seeks to contribute to improving the presence of Spain in China. Chapter 7 (pp. 193-236) is dedicated to culture and other references to culture are woven through the study (e.g. analysis of Chinese culture, Spanish culture in Chinese press, Chinese cultural habits, cultural stereotypes of Spain in China, cultural tourism). This report demonstrates the type of in-depth analysis required to identify external promotion opportunities. It highlights culture as an important asset to convey an attractive image of the country, facilitate contacts and leverage economic benefit.

Secretaría de Estado de Cultura. (2012) *Plan Estratégico General 2012-2015*. Madrid: Ministerio de Educación, Cultura y Deporte. (124 pp.)

<http://www.mcu.es/principal/docs/novedades/2012/PlanEstrategicoGeneral2012-2015.pdf>  
[13/09/2012]

The new strategic plan for culture includes a strong internationalisation element – of the five objectives, Objective 3 is:

- to drive culture as an essential element of the external projection of the SPAIN brand

Some of the strategies outlined to achieve this objective are for promotion of cultural tourism and heritage. There is to be an improvement in the general coordination structures for the internationalisation of cultural industries; support for the international promotion of Spanish visual arts; support for promotion of Spanish cinema internationally; close involvement in Iberamerican programmes and connections; support for and development of platforms for internationalisation of Spanish performing arts and music companies.

## United Kingdom

Albert, A. and Reid, B. (2011) *The Contribution of Advertising to the UK Economy*. London: The Work Foundation. (50 pp.)

<http://www.theworkfoundation.com/Reports/295/The-Contribution-of-Advertising-to-the-UK-Economy> [13/09/2012]

The advertising sector is a key part of the UK creative industries, and a leading sector for the UK globally within the knowledge economy. This report – in association with Credos, the Advertising Industry think tank – represents the first attempt to systematically map the economic impact of the UK's advertising industry on the UK economy. It concludes that the core impact – including direct, indirect and induced impacts – was £15.6bn for 2008.

Bakhshi, H. and Schneider, P. (2012) *Crossing the River by Feeling for Stones – a new approach to exporting creative content to China?* London: NESTA. (12 pp.)

[http://www.nesta.org.uk/areas\\_of\\_work/creative\\_economy/assets/features/crossing\\_the\\_river\\_by\\_feeling\\_for\\_stones](http://www.nesta.org.uk/areas_of_work/creative_economy/assets/features/crossing_the_river_by_feeling_for_stones) [13/09/2012]

A paper from NESTA, the UK innovation foundation: it looks at the low share of creative goods exports from the UK to China, indicating that the UK's creative industries are punching below their weight in China. It proposes using new strategies with Chinese social media for UK creatives to engage with potential consumers in China and share content.

Burrows, H. and Ussher, K. (2011) *Risky Business*. London: DEMOS. (144 pp.)

<http://www.demos.co.uk/publications/riskybusiness> [11/09/2012]

The UK creative industries sector has been growing at twice the rate of the rest of the UK economy. In total it employed nearly 2.3 million people in 2010, some 7.8% of the workforce. Sector exports totalled £17.3 billion in 2008, 4.1% of the total. While the UK economy is currently growing at a snail's pace, one of the economic sectors with the greatest potential for growth is the creative industries – which include the music, fashion, video games, radio and TV production, and advertising industries. But there is a persistent prejudice that the sector is inherently risky; that creative entrepreneurs are only in it due to their passion, not their business sense. This myth is dispelled in this pamphlet, which demonstrates that on average, creative enterprises are more likely to still be in existence after five years than other businesses. The system of SIC codes in economic reporting neglects the creative industries, leading to a lack of reliable information and sound policy for the sector. *Risky Business* argues that a first step for government should be to develop a better understanding of the creative industries, through dedicating more civil servants to the sector and regularly publishing data on trends within it. This will help to encourage both appropriate policy and private sector investment, allowing the creative industries to realise their potential and make their maximum contribution to the UK's economy.

DCMS. (2011) *Creative Industries Economic Estimates*, London.

[http://www.culture.gov.uk/what\\_we\\_do/research\\_and\\_statistics/4848.aspx](http://www.culture.gov.uk/what_we_do/research_and_statistics/4848.aspx)

Annual bulletins from the UK Department for Culture, Media and Sport containing statistics on gross value added, exports, employment and numbers of businesses within the creative industries.

Kingdom of the Netherlands. (2011) *Creative Cuts*. London: The Embassy of the Kingdom of the Netherlands. (37 pp.)

<http://www.dutchembassyuk.org/images/document/369.pdf> [13/09/2012]

This research was commissioned by the Dutch Embassy in London to identify best practice research on culture and the creative industries in the UK.

Oxford Economics. (2010) *The Economic Impact of the UK Film Industry*. Oxford: Oxford Economics. (108 pp.)

<http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/economic-impact-of-the-uk-film-industry-2010-06.pdf> [13/09/2012]

Third edition of a report supported by the UK Film Council, Framestore Ltd, Cinesite Ltd, Double Negative Ltd and Pinewood Shepperton. The study analyses the economic value and impact of the sector, including findings such as:

- Films depicting the UK are responsible for generating around a tenth of overseas tourism revenue, around £1.9 billion a year.
- The core UK film industry contributes to the economy and Exchequer in a number of other ways not captured by standard multipliers – for example, by promoting British cultural life, attracting tourists to the UK, supporting UK exporters, and generating sales of DVDs, CDs and other merchandise.

Payne, J. and Jeanes, A. (2010) *Supporting UK Musicians Abroad*. London: Arts Council of England.

<http://www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/supporting-uk-musicians-abroad> [13/09/2012]

A study commissioned by the Arts Council and the British Council into funding and development opportunities for British musicians and music organisations to export and develop international markets for their work.

Reid, B., Albert, A. and Hopkins, L. (2010) *A Creative Block?: The future of the UK creative industries*. London: The Work Foundation. (45 pp.)

<http://www.theworkfoundation.com/Reports/277/A-Creative-Block-The-future-of-the-UK-creative-industries> [13/09/2012]

Looking at the effect of major long- and short-term trends on the creative industries' ability to assist the UK recovery, the report demonstrates how, despite unrivalled economic performance and their rightly-celebrated strengths, the UK creative industries are now under threat from a combination of recession-induced cuts, the global trends towards convergence and digitalisation, and concrete action from other governments to maximise the recovery-boosting economic potential of their own creative industries. A table of export growth rates for UK creative industries 2000-2007 shows the strongest sectors as Publishing; Architecture; Software, Computer Games & Electronic Publishing and Advertising.

## ANNEX 1

### **CCI export and internationalisation bodies**

Annex 1 lists many of the main bodies identified that are involved in export and internationalisation strategies for the cultural and creative industries in EU Member States. These are grouped by geographical coverage: Global, European, Multilateral/Regional and by individual EU Member State. For the national listings, some relevant city and sub-regional initiatives are listed.

The timeframe and resources for this research did not allow for a comprehensive listing of all the bodies in every EU Member State. Nevertheless, a very extensive picture of the level of activity and the range of different organisations involved in CCI export and internationalisation has been achieved. For those countries with a long listing (e.g. Finland, Netherlands, Austria, Belgium, Denmark), an indication of the degree of segmentation of responsibility among the various industry bodies can be seen. For some other countries, additional research and market intelligence work is needed to provide the full listing of responsible agencies.

The main criterion for inclusion has been a primary focus on export, with specific reference to the goods and services of the cultural and creative industries. Therefore, the national trade and industry bodies are not systematically listed for every country but they have been included where there is evidence that they work with economic sub-sectors of the CCIs. Similarly, not all ministries of culture and arts councils have been listed for the same reasons.

Many other studies list the large number of organisations in EU Member States that are involved in international cultural exchange, international cultural policy and cultural mobility. The listing does not attempt to include all such arts and culture organisations but has selected those with an export perspective to their international programmes. It does not include information on bilateral cultural agreements – except where they are directly related to cultural export policy – nor does it list all the European Union national institutes for culture (apart from those with a designated policy or strategy on export for cultural and creative industries).

The Council of Europe/ERICarts "Compendium of Cultural Policies and Trends in Europe" is an excellent reference point for Ministries of Culture, Arts Councils and sectoral bodies not listed here, as well as for other related international policy measures: <http://www.culturalpolicies.net/>

## **Global**

### **International Federation of the Phonographic Industry (IFPI)**

<http://www.ifpi.org/>

IFPI represents the recording industry worldwide with some 1400 members in 66 countries and affiliated industry associations in 45 countries. It publishes annual data on the recorded music market worldwide.

## **Europe**

### **Bureau of European Design Associations**

<http://www.beda.org>

BEDA has 42 members from 24 European countries: members can be design promotion centres and other publicly funded organisations that promote design nationally or regionally as well as professional and trade associations for designers from across Europe. Those professional

associations represent some 400,000 designers from across Europe in every discipline of work from industrial design and interiors to digital design and branding.

#### **Cineuropa – The European Cinema Portal**

<http://cineuropa.org>

Cineuropa is the first European portal dedicated to cinema and audiovisual in 4 languages. It was created in 2002 in order to provide up-to-date information and other services. Cineuropa aims to promote the European film industry throughout the world. The Industry-International Sales section contains links to all the bodies promoting films abroad.

#### **EUNIC**

<http://www.eunic-online.eu>

While the members of EUNIC network of European Union National Institutes for Culture have their own strategies for export and internationalisation of cultural and creative industries, EUNIC members engage in some joint projects which relate to export. For example, the EUNIC Cluster China had a promotion at Beijing Design Week in 2012 ([www.eunic-online.eu/node/717](http://www.eunic-online.eu/node/717)). Another example was the *Europe-China Cultural Compass*, a publication commissioned by EUNIC partners in China which mainly addresses cultural cooperation but also includes information on legal structures and business practices for setting up cultural enterprises in China ([www.eunic-online.eu/node/445](http://www.eunic-online.eu/node/445)).

#### **EURIMAGES**

[http://www.coe.int/t/dg4/eurimages/default\\_en.asp](http://www.coe.int/t/dg4/eurimages/default_en.asp)

Eurimages the Council of Europe fund for the co-production, distribution and exhibition of European cinematographic works. Set up in 1988 as a Partial Agreement it currently has 36 Member States. It aims to promote the European film industry by encouraging the production and distribution of films and fostering co-operation between professionals. Funding programmes include co-production and distribution grants.

#### **European Audiovisual Observatory**

<http://www.obs.coe.int/>

Set up in 1992, the European Audiovisual Observatory is the only centre of its kind to gather and circulate information on the audiovisual industry in Europe. It is a European public service body with 38 Member States and the European Union, represented by the European Commission.

**LUMIERE database:** <http://lumiere.obs.coe.int/web/search/>

The LUMIERE database is an industry tool provided by the European Audiovisual Observatory; it offers a systematic compilation of available data on admissions of the films released in European cinemas since 1996. It allows for direct comparisons between different European countries of ticket sales for films distributed in Europe, as well as other types of statistical analysis. The database is the result of the collaboration between the European Audiovisual Observatory and the various specialised national sources as well as the MEDIA Programme of the European Union.

#### **European Creative Industries Alliance (ECIA)**

<https://www.howtogrow.eu/ecia/>

ECIA is an open platform that brings together policy-makers and business support practitioners from 28 partner organisations and 12 countries. Its overall aim is to shape a community in Europe that actively supports creative industries as a driver for competitiveness, job creation and structural change by developing and testing better policies and tools for creative industries.

#### **European Cultural and Creative Industries Alliance (ECCIA)**

<http://www.eccia.eu/>

ECCIA is an alliance of five national European luxury goods and creative industries organisations. Collectively, European brands account for over 70% of the global luxury goods market. Total exports for the sector were approx. € 260 billion in 2010, representing over 10% of all exports from Europe.

### **European Film Companies Alliance (EFCA)**

<http://efcasite.org/>

EFCA brings together European entrepreneurs active in film production and distribution. It is a platform for information exchanges and business networking. EFCA is researching and studying market conditions, aiming to improve the competitive status of the European cinema sector.

### **European Film Export Association (EFEA)**

<http://www.efea.info>

The European Film Export Association (EFEA) was founded in 2003 by international distributors (sales agents) of feature films to join forces, to develop common strategies, and to gather and exchange trade information among the European companies. It aims to establish the important role and specific profession of international distributors in the scenario of film production, with the main target of expanding the visibility and the commercial distribution of European national productions and co-productions worldwide. The EFEA Membership has sixteen member companies to-date.

### **European Film Promotion (EFP)**

<http://www.efp-online.com/en/index.php>

European Film Promotion (EFP) is the only existing international network of organisations promoting and marketing European cinema worldwide. Founded in 1997, the network comprises professional organisations from 33 European countries who are experts in promoting and marketing their own national cinema. Under the EFP umbrella, all of these organisations work together on the promotion of European cinema and talent around the world.

### **European Magazine Media Association (EMMA)**

<http://www.magazinemedias.eu/>

EMMA represents more than 15.000 publishing houses across Europe, publishing more than 50.000 magazine titles, with a membership of 27 national associations.

### **European Music Office**

<http://www.emo.org/>

The European Music Office is an international non-profit association promoting musical diversity and representing the interests of European music professionals at a European and worldwide level. In 2004 the European Music Office launched the European Music Platform. One of the first pilot actions run by the Platform, co-financed by the European Commission, was the development of Music Export Handbooks. Export Handbooks were produced in 2004 for France, Germany, UK, USA, Japan and Brazil, and in 2007 for Finland, Spain, Russia and Austria.

### **Federation of European Publishers**

<http://www.fep-fee.eu/>

FEP is an independent, non-commercial umbrella association of book publishers associations in the European Union. FEP represents 27 national associations of book publishers of the EU and EEA, and is the voice of the great majority of publishers in Europe. FEP publishes annual statistics for the book industry in Europe and analyses trends in the market.

### **IMPALA**

<http://www.impalamusic.org/>

IMPALA is an association of independent music companies representing 4,000 members including top independents and national associations of independent companies across Europe. Its mission is to grow the independent music sector, promote cultural diversity and cultural entrepreneurship, improve political access and modernise the perception of the music industry.



## Multilateral/Regional

### Baltic Region

#### Baltic Films

<http://www.efsa.ee/>

Baltic Films is an association comprised of the three state financed governmental film bodies, overseeing the film branch, in Estonia, Latvia and Lithuania. It operates from the Estonian Film Foundation. Founded in 2000, Baltic Films has mainly focused on promoting films from Baltic countries abroad, participating at the key film markets and co-operating with festivals and film days.

### Francophonie

#### Organisation Internationale de la Francophonie (OIF)

<http://www.francophonie.org/>

La Francophonie is a membership organisation, covering 75 states and governments around the world (EU MS: France, Belgium – French Community, Luxembourg, Romania, Bulgaria, Greece & Cyprus) and works through multilateral cooperation programmes among countries using the French language. Under the Cultural Diversity action line, the OIF supports the external promotion and touring of various CCI sub-sectors within the Francophonie territories:

- Touring and promotion of visual and performing artists and their productions
- Participation of artists in international music markets, e.g. Babel Med, Marseille
- Support for book fairs and literary encounters
- Support for promotion and distribution of audiovisual productions through film festivals and international film markets

#### Francophonie Diffusion

<http://www.francodiff.org>

Created in 1993, Francophonie Diffusion promotes artists and music from the Francophone area through a worldwide network of more than 1000 media outlets (radio stations, online media), festivals and music managers worldwide located in 100 countries, provinces or territories. In addition to its role in the export of Francophone music, Francophonie Diffusion initiates communication between all Francophone partners (radio broadcasters, online media, festivals, music supervisors, artists, record labels, agents, private and governmental operators) towards a common framework.

### Iberamerica

#### IBERESCENA

<http://www.iberescena.org/>

The programme is open to applicants from member states of the IBERESCENA Programme (Argentina, Brazil, Colombia, Chile, Costa Rica, Dominican Republic, Ecuador, Mexico, Peru, Spain and Uruguay). It offers grants to co-finance Iberamerican performing arts projects through:

- International touring through networks, festivals and performing arts venues
- Co-productions between arts companies from the eligible countries

#### IBERMEDIA

<http://www.programaibermedia.com/>

The programme is open to applicants from member states of the IBERMEDIA Programme (Argentina, Bolivia, Brazil, Colombia, Costa Rica, Cuba, Chile, Dominican Republic, Ecuador, Guatemala, Mexico, Panama, Paraguay, Peru, Portugal, Puerto Rico, Spain, Uruguay and Venezuela). Grants are available to co-finance film and TV co-productions, development and distribution projects, to support film-making in Spanish and Portuguese language within the Iberamerican space.

## **Nordic Region**

These bodies cover the Nordic territories of Denmark, Finland, Norway, Sweden and Iceland. Nordic cooperation measures for the development of creative industries are explained in more detail on the Nordic Council of Ministers website:

<https://www.norden.org/en/about-nordic-co-operation/areas-of-co-operation/creative-industries/nordic-co-operation-for-the-development-of-creative-industries/>

### **KreaNord**

<http://www.kreanord.org>

KreaNord is a Nordic initiative designed to improve the growth prospects for the region's cultural and creative industries. The work is conducted by the Nordic Council of Ministers and serves as a Nordic platform for exchange and development. The cultural and creative industries mean industries that provide jobs, growth and exports, which is an important future asset for the Nordic countries. It includes fashion, music, publishing, design, architecture, animation and film. KreaNord is about supporting the Nordic countries' individual and joint development potential in the cultural and creative industries. Within KreaNord various activities are conducted such as projects, profiling activities and development of policy recommendations.

### **Nordic Culture Point**

<http://www.kulturkontaktnord.org/lang-en/home>

Nordic Culture Point is an institution of the Nordic Council of Ministers. It offers a range of funding to support Nordic-Baltic arts and culture collaboration, research and networking. The Nordic-Baltic Mobility Programme for Culture, although not targeting export research, can support travel expenses of professional artists and cultural operators in all fields of art and culture living in the Nordic and Baltic countries going to another Nordic or Baltic country. The priorities are for travel related to arts and culture projects and research plans with a Nordic-Baltic relevance; quality, new constellations and initiatives; increased communication and activities in the Nordic-Baltic Region.

### **Nordic Game Program**

<http://www.nordicgameprogram.org/>

The mission of the Nordic Game Program is to ensure access to quality material with a distinct Nordic element in computer games for children and young people. The programme was launched in 2006 and is planned to run until 2012, initiated and financed by the Nordic Council of Ministers. The Nordic Game Program is the driving force behind the strong Nordic presence at world's most important games industry events, such as E3, GDC, GC Leipzig, and Lyon Game Connection, as well as Norden's premier games conference, Nordic Game 2006. The Nordic Game.Net online games directory provides information about game companies and organisations in the Nordic region.

### **Nordic Innovation**

<http://www.nordicinnovation.org/>

Nordic Innovation is a Nordic institution working to promote cross-border trade and innovation. Its mission is to generate increased value creation through cross-border co-operation. It provides an international overview to strengthen the Nordic region's competitiveness in a global market. The Nordic Innovation Centre (the former name of the organisation) commissioned several major reports (see Bibliography) addressing the creative economy and Nordic framework policy for supporting the creative industries. Nordic Innovation runs the *Nordic Innovation Representation Programme*, a global programme offering funding for Nordic projects (activities related to innovation, promotion, branding of Nordic competences in all types of business, with a focus on green technology, energy and transport) in Asia, Latin America, North America, Africa, the Middle East or Oceania. The programme follows a pilot regional project (2009-2012): *Nordic Innovation Projects with Asia*.

<http://nordicinnovation.org/en-GB/funding/nordic-innovation-representations-programme-goes-global/>

### **Nordic Music Export Programme (NOMEX)**

<http://nordicmusicexport.com/>

NOMEX is a collaborative organisation for the Nordic Music Export offices: Music Export Finland, Export Music Sweden, Music Export Norway, Music Export Denmark and Iceland Music Export. Its objectives are:

- Working on projects beyond the Nordic territory together with its members
- Strengthening the Intra-Nordic market
- Providing support services to its members

### **Nordisk Film & TV Fond**

<http://www.nordiskfilmogtvfond.com/>

Established in 1990, the Fund's primary purpose is to promote film and TV productions of high quality in the five Nordic countries by providing support for top-up financing of feature films, TV-fiction / series and creative documentaries. The Fund also supports a range of other initiatives to assist its productions to travel further throughout the Nordic region (Distribution and Dubbing – into another Nordic language). It assists the region's professionals in developing and improving their knowledge and skills and offers support for a range of film events and festivals of Nordic importance. From 2010-2012 the Nordisk Film & TV Fond ran the High Five programme with an additional earmarked Globalisation Fund grant from the Nordic Council of Ministers. This funded distribution support for Nordic cinema outside the Nordic region, research into new markets, digital media and video on demand (VOD) partnerships, master classes and investment in media content for Nordic children. A new VOD partnership has been established with MUBI.com in the UK in 2012 (Scandi Sensations) and a market research report on opportunities in the BRIC countries is due in autumn 2012. See Bibliography for interim report on High Five.

## **EU Member States**

### **Austria**

#### **Austrian Film Commission**

<http://www.afc.at/jart/prj3/afc/main.jart>

The Austrian Film Commission (AFC) is an organisation dedicated to promoting Austrian cinema throughout the world. Its role is to increase awareness of Austrian filmmaking abroad and to support the positioning and release of Austrian films on the international marketplace. The AFC represents Austrian films at all major festivals and markets - including Cannes, Berlin, Venice, Toronto, San Sebastian, Rotterdam, Locarno, Karlovy Vary, Pusan, Buenos Aires and Los Angeles.

#### **Austrian Film Institute**

<http://www.filminstitut.at/>

It aims to support: the production, dissemination and marketing of Austrian films; the cultural, economic and international aspects of the Austrian film industry; improving the international orientation of Austrian film and, hence, the basis for the dissemination and market-oriented exploitation of Austrian films in Austria and its economic and cultural impact at international level, particularly by supporting the presentation of Austrian film domestically and abroad; supporting Austrian-international co-productions. Several grant strands aimed at export and international dissemination of films made in Austria or by Austrian film makers.

#### **Austrian Music Export**

<http://www.musicexport.at/>

A joint initiative of the Austrian Music Information Center mica – music austria and the Austrian Music Fund in close cooperation with the organizers of the Austrian booths at international music trade fairs, Austrian Music Export aims to be a service and resource centre for exporters of contemporary Austrian music in all genres and aspects (recordings, live, synch, etc.). It provides information on

Austrian artists and companies, builds a network of industry professionals and media, provides travel support and represents Austrian music at international trade shows, conferences and festivals.

#### **Bundesministerium für Unterricht, Kunst und Kultur – BM: UKK**

<http://www.bmukk.gv.at/kunst/foerderungen/index.xml#toc3-id2>

Various grants are available from the Culture Ministry for international participation, study, residencies, travel, research etc. for artists and cultural managers in Austria in different arts and culture disciplines. Some of the support programmes specifically target the internationalisation and export of cultural and creative industries:

- Grants for commercial galleries in Austria to exhibit at artfairs abroad (*Galerien Auslandsmesseförderung*). For participation in prestigious international fairs: max. grant of €300,000. Per gallery and year the attendance of up to 2 trade fairs can be supported with a fixed lump sum of € 4,000 per show. Grant guidelines (in German): <http://www.bmukk.gv.at/medienpool/18164/auslandsmessefoerderung.pdf>
- Grants for film professionals (*Festivalverwertung*) of up to 15.000 € for participation in designated film festivals abroad. 2011 list of film festivals: [http://www.bmukk.gv.at/medienpool/17799/festivalliste\\_2011.pdf](http://www.bmukk.gv.at/medienpool/17799/festivalliste_2011.pdf)
- Other travel grants for event participation are found under *Reisenkostenzuschuss*.

#### **creativ wirtschaft austria (cwa)**

<http://www.creativwirtschaft.at/>

creativ wirtschaft austria holds as its remit the interests of the Austrian creative industries, both at a national, European and international level. cwa is an integral part of the Austrian chamber of commerce. It is committed to developing the creative industries in Austria and creating linkages with other sectors. Activities include skills development, advocacy and acting as a knowledge hub. It is a partner in the *evolve* initiative, with its *impulse* programme of grants for creative entrepreneurs.

#### **departure – the Creative Agency of the City of Vienna**

<http://www.departure.at/en>

departure was established in 2003 as Austria's first independent business promotion agency and service centre for creative industries companies. departure is a subsidiary of the Vienna Business Agency and part of the department for economic affairs of the City of Vienna. It offers various funding programmes for entrepreneurs and company founders and supports achievements in the creative industries: fashion, music, audio-vision, multimedia, design, publishing, art market and architecture. Business experts offer advice and mentoring, such as internationalisation and market development. "International orientation particularly in view of commercial exploitation and distribution" is one of the criteria for the current departure: focus funding programme.

#### **designaustria**

<http://www.designaustria.at/>

designaustria is Austria's premier contact point for design. Founded in 1927, designaustria is Europe's third oldest design organisation and currently has over 1300 members. designaustria represents the country's design scene on both national and international levels and promotes its achievements through »Design in Austria« .

#### **evolve – impulse programme**

<http://www.evolve.or.at>

<http://www.impulse-awsq.at/iP/>

evolve is an initiative of the Federal Ministry of Economy, Family and Youth (BMWFJ). It is carried out by the *austria wirtschaftsservice* (aws) and by *creativ wirtschaft austria* (cwa), which together implement the services. evolve offers a range of services to support creative entrepreneurs in Austria. Among these, impulse is a tailor-made programme to meet the needs of the creative industries and offers funding and support to develop business projects, including export and internationalisation strategies, in the fields of design and innovative media.

### **go-international**

<http://www.go-international.at/go-international/index.php>

go-international initiative established by the Austrian Federal Ministry of Economy and the Austrian Federal Economic Chamber encourages companies to step across the border by offering advisory services, events and support, making it easier for existing exporters to enter additional foreign markets. This export promotion initiative is implemented by Advantage Austria and comprises numerous support measures grouped into five clusters each focusing on a specific goal: How to do business abroad; Strengthen strengths; Exporting Know-how; from exporting to integrated value-chains; Communicating Austria. go-international offers companies discounted participation fees for events such as trade and fact-finding missions, trade fairs and Austria Showcases.

### **Unit F büro für mode**

<http://www.unit-f.at>

Unit F Designer Support was founded in 2000 with the aim to grant financial support to fashion designers in Austria who have the potential to establish themselves in the international market. A tailor-made Excellence-Funding Programme was set up which, through the decision and evaluation of an independent jury of industry experts, to assist fashion designers along their path towards internationalisation. Selected designers are supported with a maximum amount of € 7,500 per project, which can only make up a financing in part. The main focus is on creative work on an international level. Since 2000, 64 experts have decided on the support of 64 designers in their execution of 149 projects. Most of the financial means available for supporting young talents are made available by the Arts Division of the Federal Austrian Ministry for Education, Arts and Culture and by the Culture Division of the City of Vienna. A collaboration with Austrian Trade as part of the 'go international' programme has also made it possible for designers to apply for seasonal showroom funding to show their collections as part of Paris Fashion Week.

### **WKO – Austrian Economic Chambers**

[http://portal.wko.at/wk/startseite\\_th.wk?sbid=2202](http://portal.wko.at/wk/startseite_th.wk?sbid=2202)

The department of creative industries is part of foreign relationships. News on recent promotions abroad of Austrian creative industries is presented on the website.

## **Belgium**

### **Creamoda**

<http://www.creamoda.be>

A professional association of fashion businesses in Belgium, Creamoda offers a range of services, including business support for internationalisation and export development.

### **MAD Brussels**

<http://www.madbrussels.be>

MAD Mode and Design Center in Brussels aims to raise the visibility of the fashion and design creators of Brussels. It has an international mission and coordinates local and international events aiming to promote Brussels creators (e.g. through export support, international salons etc.)

## **Flemish Community**

### **Design Flanders**

<http://www.designvlaanderen.be>

Design Flanders - the only Flemish government institution in this field - promotes design both in Belgium and abroad, but primarily to Flemish enterprises.

### **Flanders Audiovisual Fund (VAF)**

<http://www.vaf.be/vorming-onderzoek/studie-en-werkbeurzen/>

The Flanders Audiovisual Fund (VAF) supports audiovisual production in, as well as international co-productions with Flanders. The Fund was set up by the Flanders government in 2002. Flanders Image

is a division of the Flanders Audiovisual Fund, taking care of the promotion of Flanders audiovisual productions in Belgium as well as abroad.

#### **Flanders District of Creativity**

<http://www.flandersdc.be/en>

Flanders DC is the Flemish organisation for entrepreneurial creativity. Its mission is to make entrepreneurial Flanders more creative and Creative Flanders more entrepreneurial. It does research on creativity, innovation, entrepreneurship and creative industries, sets up events, develops tools and brings people together. Flanders DC aims to unite the most dynamic regions in the Districts of Creativity Network, aiming to learn from the very best. The network organises the annual Creativity World Forum. There are currently 14 member districts worldwide (9 in EU MS and 5 in Asia, Latin America, North America): [www.districtsofcreativity.org](http://www.districtsofcreativity.org)

#### **Flanders Fashion Institute**

<http://www.ffi.be/en>

Flanders Fashion Institute was founded in 1998 to help designers acquire the necessary skills to manage the four aspects of the business: creation, production, distribution and promotion. FFI specifically focuses on informing, coaching and promoting. It organises a number of events to introduce Belgian designers to buyers and the press, e.g. Showroom Belgium at Paris Fashion Week.

#### **Flanders Image**

<http://www.flandersimage.com/>

Created in 1990, Flanders Image is the audiovisual export agency for Flanders and Brussels, Belgium.

It is in charge of the promotion of Flemish audiovisual creations abroad and is the sole official representative of Flanders cinema at all key international festivals and markets. In 2003, Flanders Image became part of the Flanders Audiovisual Fund (VAF) where its mission is to both maximise the cultural impact of Flemish audiovisual creations and enhance its economic growth abroad. Flanders Image supports Flemish audiovisual creations and talents at the major film festivals around the globe. It produces publications, both online and in print, informs curators and buyers, runs market and festival booths, etc. Together with third parties, it explores emerging markets and new and improved ways of presenting audiovisual creations. Flanders Image is supported by the Flanders Government and by Brussels Export.

#### **Flanders Investment & Trade (FIT)**

<http://www.flanderstrade.com/>

FIT is the government agency for Flanders promoting sustainable international business. It has a network of overseas offices and presents Flemish businesses at international trade events.

#### **Flemish Literature Fund**

<http://buitenland.vfl.be/en>

The Flemish Literature Fund is an autonomous governmental institution that promotes Dutch-language literature in Belgium and abroad. The emphasis is on literary production by Flemish authors. It offers various support schemes, including translation grants and small travel grants to authors going abroad to promote their work. FLF also organises promotions of Flemish literature at international book fairs such as Beijing Book Fair in 2011 & 2012, as well as Frankfurt Book Fair, Helsinki Comics Festival, London Book Fair, Bologna Children's Book Fair and other events.

#### **Kunsten en Erfgoed (Arts and Heritage)**

<http://www.kunstenerfgoed.be/ake/view/nl/903595-Subsidies+Internationaal.html>

This Flemish body implements the Arts Decree (Kunstendecreet) and offers grants for a range of international arts and culture initiatives, mostly aimed at cultural project development, international exchange and networking. Some travel subsidies are offered for event participation although these are specifically not for 'prospecting'. This agency has formerly offered small grants to galleries exhibiting at international shows (Art Basel, Armory, ARCO Madrid, Frieze etc.), but this strand of the international programme last reported in 2010 and is suspended in 2012.



## UNIZO

<http://www.unizo.be/international/>

UNIZO is the union of self-employed entrepreneurs in Flanders. UNIZO-International assists SMEs in their international activities. This assistance is not limited to export only: it also includes other forms of internationalisation such as imports, investments and temporary assignments abroad.

## French Community: Wallonie & Bruxelles

### AWEX: Agence Wallonne à l'Exportation et aux Investissements étrangers

<http://www.awex.be/fr-BE/Pages/Home.aspx>

AWEX provides a full range of export advice and services for businesses in the French-speaking community of Belgium. It offers sector-specific information for Publishing & Graphic Arts; Interior Decoration, Furniture & Design; Tourism-Leisure-Culture. AWEX has specific cultural industry links to programmes of Wallonie-Bruxelles Design/Mode and Wallonie Design. AWEX designates annual target markets, one in Europe, one outside, for priority actions. The 2012 target markets are:

- Northern Italy
- Chinese province of Hubei

Further information: [http://www.awex.be/fr-](http://www.awex.be/fr-BE/Nos%20services%20%C3%A0%20l%27export/Programme%20d%27actions/Documents/Plus_d_i)

[BE/Nos%20services%20%C3%A0%20l%27export/Programme%20d%27actions/Documents/Plus\\_d\\_i](http://www.awex.be/fr-BE/Nos%20services%20%C3%A0%20l%27export/Programme%20d%27actions/Documents/Plus_d_infos/Marches-cibles-2012.pdf)  
[nfos/Marches-cibles-2012.pdf](http://www.awex.be/fr-BE/Nos%20services%20%C3%A0%20l%27export/Programme%20d%27actions/Documents/Plus_d_infos/Marches-cibles-2012.pdf) [28/08/2012]

### Wallonie-Bruxelles-International

[http://www.wbi.be/cgi/bin3/render.cgi?id=0134996\\_enumeration&ln=ln1&userid=&rubr=gen+culture](http://www.wbi.be/cgi/bin3/render.cgi?id=0134996_enumeration&ln=ln1&userid=&rubr=gen+culture)

The role of the organisation is to support international dissemination activities of the cultural industries from the French-speaking community of Belgium. The programmes cover:

- *Film & audiovisual*: support is channelled through Wallonie Bruxelles Images (<http://www.wbimages.be/>). Grants for sub-titling, film festival presentation and attendance, showcases etc.
- *Theatre & dance*: support through Agence Wallonie-Bruxelles Théâtre/Danse includes support for economic prospecting of overseas markets.
- *Visual arts & design*: support for fashion designers through Wallonie-Bruxelles Design/Mode. Other visual arts support for galleries to show at international fairs; artist participation in prestigious international biennales etc.
- *Music*: targeted support through Wallonie-Bruxelles Musique.

### Wallonie-Bruxelles Design/Mode

<http://www.wbdm.be/fr/index.html>

WBDM offers assistance for fashion designers to export. It facilitates contacts with the international press, design editors, fashion buyer, with a range of support mechanisms.

### Wallonie Design

<http://www.walloniedesign.be>

Offers support for design micro-businesses in the form of 'Coaching cheques' for mentoring advice to prepare a business for the international market, to business planning to an export strategy, with the support of an expert in overseas business from AWEX.

### Wallonie-Bruxelles Musique

<http://www.wbm.be/>

WBM was created in 1984 to help artists, producers and publishers from the French-speaking community of Wallonia and Brussels to make their mark in the musical cultural industry. Supporting their presence at music markets, e.g. MIDEM in Cannes, WOMEX and STRICTLY MUNDIAL (world music markets), Popkomm (Berlin), MUSICORA (classical music fair in Paris), SONAR (Barcelona's electronic music market); supporting the presence of artists at major festivals and international showcase events; other international promotional tools and strategies.

## Bulgaria

### Bulgarian National Film Center

<http://www.nfc.bg/>

The Bulgarian National Film Center is the Executive Agency of the Bulgarian Ministry of Culture that administrates the implementation of the Film Industry Act (FIA). Its main functions include financing film production, distribution and exhibition of films and to support the promotion of Bulgarian films in the country and abroad.

## Cyprus

### Cyprus Ministry of Education and Culture

<http://www.moec.gov.cy/en/index.html>

According to the Ministry's 2011 Annual Report, one of the responsibilities of the Department of Cultural Services is to promote the achievements of the country's cultural activities abroad. Export related support in 2011 included:

- Dispatch of Cypriot literature to cultural and academic institutions and libraries abroad
- Participation in literature events abroad
- Grants for music performances abroad
- Cypriot participation in MIDEM (since 2005)
- Cypriot pavilion at the Venice Biennale
- Sponsorship of film directors to present works at international film festivals
- Cyprus cultural institutes abroad

## Czech Republic

### Czech Film Center

<http://filmcenter.cz/en/homepage>

The main goal and content of the CFC's activities are the promotion of Czech cinematography and the Czech film industry abroad. It does this through two divisions:

- **Film Promotion (FP)**, which is involved in the promotion of Czech films abroad
- The **Film Commission (FC)** provides services to incoming foreign film productions and promotes the Czech Republic as a shooting location, has been in operation since 2004

FP coordinates publications and promotional activities at important international festivals and markets (e.g. Cannes, Berlinale & European Film Market, international co-production markets).

## Denmark

### CKO – Center for Cultural and Experience Economy / Center for Kultur- og Oplevelsesøkonomi

<http://cko.dk/en>

CKO is an independent government-funded agency established in 2008 by the Ministry of Economics and Business Affairs and the Ministry of Culture. It works on national, Nordic and European level. CKO's mission is to improve the conditions for growth through better collaboration between the business and cultural sectors, including strengthening the cultural sector's business skills. In 2012, it co-organised the [Born Creative](#) conference in Copenhagen, on export success strategies for creative businesses. It funded the [Element 5](#) project in 2012, a creative collaboration between Danish businesses in solar panel industry, fashion, set design, music and film aiming to "smash the old-school framework of traditional export trade missions" and develop a new model for export support based on incorporating experience as a commercial factor on par with other product characteristics.

### Danish Agency for Culture

<http://www.kunst.dk/english/>

The Danish Agency for Culture's international work is designed to support collaboration between Danish and international artists and art institutions. The funding focus is not specifically on export. The Danish Arts website provides an integrated information system on funding for international activity across all artforms, directing applicants where appropriate to other organisations. Programmes related to export and internationalisation of cultural and creative industries include:

- *Visual arts*: Travel, accommodation, catalogue and other expenses for Danish visual artists participating in the following biennales: São Paulo, Istanbul, Gwangju, Liverpool, Sydney & Documenta (this list can be revised).
- *Literature*: Grants to Danish authors and foreign institutions to support the attendance of Danish writers at literary festivals, readings and other events designed to promote the foreign publication of a work.
- *Translation Fund (Literature)*: Open to Danish publishers wishing to publish a work in a Danish translation or foreign publishers wishing to publish a work translated from Danish. The aim is to promote Danish literature abroad and translated literature in Denmark.
- *Marketing & Promotion Fund (Literature)*: The fund is open to foreign publishers publishing Danish literature outside of Denmark, organisers of literary events and libraries.
- *Music*: Grants to cover the cost of professional musicians' international transport and international projects (classical music).

A Danish-Australia promotion took place in Sydney and Melbourne in 2011, with Danish furniture design, installations and art exhibitions. This collaboration between art, culture and commerce was initiated by the Danish Ministry of Foreign Affairs and the Danish Ministry of Culture. The Danish Arts Agency worked with the Danish Embassy in Canberra, the Danish Consulate-General in Sydney, the Confederation of Danish Industry, the Danish Agriculture and Food Council, the Danish Trade Council and the Danish Ministry of Foreign Affairs Public Diplomacy Service on the pilot project to tie in with an export drive to Australia. More information: <http://www.kunst.dk/index.php?id=8254>

### Danish Business Authority (Erhvervsstyrelsen)

[http://www.erhvervsstyrelsen.dk/innovation\\_and\\_growth](http://www.erhvervsstyrelsen.dk/innovation_and_growth) <http://www.ebst.dk>

Under Denmark's new Design Policy, Danish design is to be strengthened as a trade, both on the national and international scenes, and the interaction between the business community and the design sector is to be intensified. This government body, under the Ministry of Economic and Business Affairs, is working on the business policy aspects of Danish design and sets out the action areas, challenges and initiatives.

### Danish Crafts

<http://www.danishcrafts.org>

Danish Crafts' work is aimed at branding Danish craft and design at an international level and helping professional craft artists and designers gain a foothold in the international market. It organises presentations of Danish craft and design in fairs such as Maison&Objet in Paris, Ambiente in Frankfurt and International Contemporary Furniture Fair in New York. Since 2008 it has organised an annual MINDCRAFT showcase of contemporary Danish work in Milan during Fuori Salone.

### Danish Design Centre

[http://en.ddc.dk/about\\_ddc](http://en.ddc.dk/about_ddc)

The Danish Design Centre is Denmark's knowledge centre for design. The primary basis for Denmark's design policy – "DesignDenmark" – is to improve Danish companies' value growth through an increased use of design. The ambition is to bring Denmark back into the international design elite, thus improving Denmark's competitiveness. The Danish Design Centre carries out an active international branding effort for Danish design focused on profiling contemporary Danish design and Danish design competences. The goal of these efforts is to promote international awareness of Danish design and of Denmark as a design nation and to establish Danish design as a brand that is capable of attracting investments and clients to Denmark.

### Danish Film Institute

<http://www.dfi.dk/>

The Danish Film Institute (DFI) is Denmark's national agency for film and cinema culture, supporting the development, production and distribution of film in and from Denmark. The Danish Film Institute works to ensure that Danish films are widely accessible – not least abroad, with funding support programmes for promoting Danish films internationally. The DFI festival team has built strong ties with major festival venues around the world. The Danish representations and cultural institutes around the world are sent an annual film package, with English subtitles, for screenings and other promotions. The annual *DFI brochure Facts & Figures* gives some information on international successes. In 2010 a new *Film Agreement 2011-2014* was approved by the Danish Parliament which, among other measures, increased support for the development of computer games for children and youth (from 12m DKK to 20m DKK). The Ministry of Culture, in cooperation with the Ministry of Economic and Business Affairs and the Ministry of Foreign Affairs, will examine possibilities of attracting capital to and optimizing the market potential for computer games.

### Dansk Fashion & Textile

<http://www.dmoqt.dk/en/Topmenu/welcome.aspx>

The trade association for Danish textile and clothing companies, representing 340 of the biggest and strongest players in the Danish fashion and textile industries, Dansk Fashion & Textile takes a proactive role in promoting the sector. It deals with export initiatives, international trade fairs, international buyers and agents, aiming to set up collaborations with strong international partners.

### JazzDenmark

<http://www.jazzdenmark.dk>

JazzDenmark is represented at several exhibitions around Europe each year, to promote and market Danish jazz to an international market. It has an export drive mission: in 2009/10 it created touring routes for Danish jazz musicians in the Czech Republic, Slovakia, Hungary, Romania and Bulgaria; since 2007 it has supported the growing interest in Danish jazz in Asia, especially in South Korea and China; it offers travel support to Danish musicians touring internationally through its JazzDenmark Puljen; from August 2012 the 18-month music export and exchange project Dinâmica Dinamarquesa (Danish Dynamics) aims to increase awareness about and promote new Danish jazz and electronic music in Brazil.

### Music Export Denmark

<http://www.mxd.dk/>

MXD was founded in 2004 as a joint initiative of Denmark's Radio, The Roskilde Festival/ the Venue Foundation, and ROSA - The Danish Rock Council. Soon after its formation, the Danish division of IPFI Denmark, and DUP - The Independent Record Companies joined, and acknowledging this wide support of the initiative, the Ministry of Cultural Affairs increased its funding of the project. The objectives of MXD are to support the export of Danish Music and to promote Danish Professional popular music abroad - both commercially and culturally.

### The Trade Council

<http://um.dk/en/tradecouncil/>

The Trade Council is the export and investment organisation within the Ministry of Foreign Affairs of Denmark. "Value, Growth and Knowledge for Denmark" is The Trade Council's strategy towards 2015. The Export Start Programme targets small and medium sized companies with international potential. Co-financing is available for joint export promotion campaigns for groups of minimum five Danish companies. Market information reports are published online (in Danish). *Focus Denmark* (in English) is aimed at foreign importers and recently featured the worldwide success of Danish TV drama and the Scandinavian thriller wave.

### World Music Denmark

<http://www.worldmusic.dk/>

Responsible for the development and promotion of Danish world music, including music export and the promotion of Danish world music abroad.

## **Estonia**

### **Creative Estonia**

<http://www.looveesti.ee/en.html>

Creative Estonia was established in 2009 by Enterprise Estonia, funded by the European Social Fund in order to increase awareness about the potential of creative industries in Estonian economy. Creative Estonia's activities involve developing a creative industries web portal, a comprehensive collection of relevant information on creative industries, web resources for start-up companies, online advice, networking support and in the future also promotional and marketing capabilities for creative companies. As Estonia has a very limited market and a small population, it is vital for Estonian companies to cooperate with neighbouring countries and form working clusters.

### **Design Excellence Estonia**

<http://www.disainikeskus.ee/en/design-excellence-estonia>

A programme of the Estonian Design Centre, Design Excellence Estonia connects 20 acknowledged Estonian design companies, strong in fields ranging from strategic, communication and industrial design and handicraft-based unique design. These companies want to develop faster and penetrate foreign markets, by acting together and focusing on joint marketing. An annual catalogue profiles the work of the 20 member companies. It is published annually in four languages and is part of the design bureau's export and cooperative marketing strategy.

### **Enterprise Estonia**

<http://www.eas.ee/en>

Enterprise Estonia (EAS) promotes business and regional development in Estonia. Its activities include improving the export and product development capability of Estonian companies. It provides financial assistance, advice, training, foreign market research and other support.

### **Estonian Film Foundation**

<http://www.efsa.ee/>

Estonian Film Foundation (EFF) was established in 1997: its tasks include establishing and developing international film contacts; promoting Estonian films at home and abroad. EFF represents Estonia at international film festivals, markets and organisations. It publishes annual statistics for the market through the Baltic Films partnership with Latvia and Lithuania.

### **Estonian Music Development Center**

<http://www.estonianmusic.ee/>

EMAK initiates and coordinates development and music export projects. Estonian Music Development Center has member organizations from public, private and the third sector, and it functions as a communication platform between Estonian and foreign music organizations.

### **Estonian Publishers Association**

<http://www.estbook.com/?id=35&lang=1>

Founded in 1991, the association has 33 members, most playing a significant role in the Estonian book market. The Association is a member of Federation of European Publishers. The Association offers services to their members in many areas, especially in promoting books throughout Estonia and abroad during fairs and international gatherings.

## **Finland**

### **Arts Council of Finland**

<http://www.taiteenkeskustoimikunta.fi/en/web/tkt/frontpage>

Grants and subsidies from the Arts Council of Finland for international projects "are intended to support international cultural co-operation, export and exchange projects in different fields of the arts". The Arts Council of Finland is proposed to become the Centre for the Promotion of the Arts.



### **Creative Industries Finland (CIF)**

<http://www.creativeindustries.fi/>

Creative Industries Finland (CIF) provides information and services for creative industries developers, policy-makers and key interest groups. It publishes news, facts and figures that support the understanding and development of the creative economy as well as provide bases for foresight. Annual events and workshops provide platforms for networking and coordination of development activities nationally and internationally. CIF was launched in 2008 as a coordinator for the national *Development Programme for Business Growth and Internationalization of Creative Industries 2007-2013*, a program directed by the Ministry of Education of Finland. It also coordinates and supports the realization of 10-20 development projects funded from the program.

### **Creative Tampere**

<http://www.luovatatampere.fi/english/>

Creative Tampere works towards improving the creative economy in the Tampere region. It was started as a business development programme and ran 2006 - 2011. From the beginning of 2012 Creative Tampere's work in furthering the creative economy and creative industries has continued. The main thrust of Creative Tampere's work is in guiding businesses, training, projects in specific fields, creating a centre for creative industries, and creating a new centre for the media industry. Creative Tampere is organising the Creativity World Forum 2013 event, which is the world's largest annual conference for the creative economy. Creative Tampere was cited as a good practice example in the KEA study for CREA.RE, *Measuring Economic Impact of CCIs Policies*, noting the Klub Tampere project which it funded for creative industries export (see bibliography).

### **Dance Info Finland**

[http://www.danceinfo.fi/?locale=en\\_US](http://www.danceinfo.fi/?locale=en_US)

Dance Info Finland's task is to promote the status, conditions and recognisability of dance in Finland and to raise the profile of Finnish dance art abroad. It has developed long-term projects with Japan and Korea. It regularly represents Finnish dance at fairs and events abroad (in 2012: APAP, New York; TPAM, Tokyo; PAMS, Seoul; tanzmesse, Dusseldorf). Dance Info Finland publishes annual Dance Statistics which include the location, number of performances and audience size of Finnish dance companies performing abroad.

### **Design Forum Finland**

<http://www.designforum.fi>

Design Forum Finland is the promotion organization of Finnish design. The international projects of Design Forum Finland aim at increasing the export of designed products and design expertise. They unite various actors from companies and individual designers to public bodies both in Finland and abroad. The products of Finnish design and related technologies and skills provide increasingly broader visibility and promote the internationalization of business. The main target areas include Central Europe, Russia, Japan and the United States. A strong message of the Finnish innovation society and its creative industries is presented by these projects.

### **Finnanimation**

<http://www.finnanimation.fi/>

Finnanimation is a non-profit association formed by Finnish animation producers in 2005. It carries out various promotional and cultural export activities in all continents.

### **Finnish Film and Audiovisual Export (FAVEX)**

<http://www.favex.fi/>

FAVEX is an association which facilitates promotion, marketing and sales of Finnish audiovisual content and services, be it in the spheres of television, film or publicity. FAVEX aims at being a contact point and knowledge provider for Finnish production companies on one hand, and for international buyers and distributors in the audiovisual industry on the other hand, especially being so for the small and medium sized enterprises. FAVEX can also be considered a spokesperson for the international and export related topics of the industry, together with other associations, especially the



Finnish Film Foundation, working with audiovisual matters or working with export of other cultural contents, such as music, design, art or literature.

#### **Finnish Film Foundation**

<http://www.ses.fi/>

The Finnish Film Foundation's task is to support and develop Finnish film production, distribution and exhibition. It is responsible for the cultural export of Finnish films. The goal of International Promotion is to make Finland, Finnish film art and Finnish culture known abroad and to promote international sales of Finnish films. It aims to screen Finnish films at as many internationally significant film festivals abroad and other events as possible. The annual *Fact and Figures* report includes statistics for international distribution of Finnish films.

#### **Finnish Literature Exchange (FILI)**

<http://www.finlit.fi/fili/en/>

FILI is an expert and export organisation, which supports the translation, printing and publication of literature and promotes the awareness of Finnish literature abroad. As well as translation grants, it supports promotional activities for new or recently published translations of Finnish books abroad. Grants are awarded for travel expenses for Finnish authors to attend promotional events or translation launches. Finland is scheduled as Guest of Honour at Frankfurt Book Fair 2014.

#### **Finnish Theatre Information Centre (TINFO)**

<http://www.tinfo.fi/>

Among the activities, TINFO offers grants for translation of Finnish plays, using international potential as one of the evaluation criteria. TINFO led the Seeds of Imagination project in 2009-10 which explored markets and mobility opportunities for Finnish theatre in Russia.

#### **FINNVERA**

<http://www.finnvera.fi>

Finnvera offers financing solutions for start-up, growth, internationalisation and export. It is the official Export Credit Agency of Finland. A current case story is of Finnish company [PES-Architects](#) exporting design services to China with support of FINNVERA services.

#### **Finpro**

<http://www.finpro.fi/web/english-pages>

Finpro is a global organization building the growth and success of Finnish companies in international markets. Luovimo programme has been developed for creative industries (see below).

#### **Luovimo**

<http://www.finpro.fi/web/english-pages/luovimo>

Luovimo is an international growth programme for creative industry companies with a focus on innovative service and content business. It is a programme of Finpro, a globally-operating expert organisation which promotes the international success of Finnish companies. Luovimo offers hands-on support to international growth planning and market entry and facilitates networking and shared learning between companies from different creative industry sectors. In particular, Luovimo is focused on music, film, TV/AV, performing arts, design or game related industries. The twenty programme participants (2010/11 round) include companies in the fields of design, film and television, music, performing arts, games and content production. Luovimo is financed by the Ministry of Economy and Employment and the Ministry of Education and Culture. Seventeen companies have been selected for the 2012/13 round of the programme. Seven key findings on internationalising creativity are presented from the Luovimo companies:

<http://www.finpro.fi/luovimo/scaling-up-creativity> .

#### **Ministry of Education and Culture**

<http://www.minedu.fi/OPM/Kulttuuri/kulttuuripolitiikka/?lang=en>

The Ministry sets the national cultural policy and has led on the Programme for Cultural Export Promotion 2007-2011. The latest 2020 strategy of the Ministry of Education and Culture focuses even

more on the competitive edge of the Finnish economy and culture. The vision is to place Finland among the top countries in the world in intellectual competence, sharing and creativity by 2020.

### **Ministry of Employment and the Economy**

<http://www.tem.fi/index.phtml?l=en&s=2727>

The Finnish Government has created a National Innovation Strategy which seeks to broaden the base of the national innovation policy by seeking economic growth and well-being through productivity in public services and quality of working life, as well as through private sector competitiveness. The Government Programme (2011 – 2015) includes a number of objectives and measures aimed at developing business and entrepreneurship in the creative industries. Spearhead projects include:

- Product and service development, which are helping to support cultural entrepreneurship and job creation in the creative industries
- Report on creative industry for developing activity and coordination between ministries
- Promotion of cultural exports and marketing expertise in the creative industries
- Report on a capital investment fund for businesses in the creative industries.

### **Music Finland**

<http://musicfinland.fi/>

Music Finland was formed in 2012, by merging Music Export Finland and the Finnish Music Information Centre. Music Export Finland was started in 2002 by 12 companies and organisations as an export partnership. The aim was to facilitate the promotion, marketing and sales of Finnish popular music abroad. In 2005 Music Export Finland became an export association that represents the entire Finnish music industry, with the membership comprising of a broad front of relevant organizations. MUSEX has dedicated project managers for the UK and for China & Southeast Asia.

### **Neogames**

[http://www.hermia.fi/neogames/neogames\\_in\\_english/](http://www.hermia.fi/neogames/neogames_in_english/)

Neogames is a national game centre which operates within Technology Centre Hermia. It is involved in the development of Finnish computer games related business.

### **Network for Cultural Export**

<http://www.kulttuurivienti.fi/en.php>

This site presents news and information about the Finnish Cultural Export Programme 2007-2011. The network comprises the arts and business bodies involved in cultural export in Finland.

### **TAIVEX**

<http://taivex.fi/taivex/>

TAIVEX<sup>2</sup> is an international work attachment programme for Finnish performing arts (circus, dance, theatre) professionals in 2012–2013. Selected cultural managers follow a study programme which includes strategic international development and are placed for work attachments in foreign organisations for 2-8 weeks, aiming to improve their international functions.

### **Turku European Capital of Culture 2011**

<http://www.turku2011.fi/>

Turku in Finland was the European Capital of Culture 2011. The main goals for Turku 2011 included internationalism and the commercial export of creative enterprise and culture. Turku School of Economics compiled an evaluation report for the Turku 2011 Foundation about the economic impact of the Capital of Culture year on Turku and the whole Southwest Finland. According to the results, the total production and employment impacts were clearly higher than expected.

## **France**

### **Association des Exportateurs de Films (ADEF) – French Film Export Association**

<http://www.adeffr.fr/>

Founded in 1999, ADEF has 25 member companies and represents French film sales agents. ADEF brings together the experiences and energies of respected professionals in order to create a strong

export flow, to prospect new outlets for French and European productions, to develop common strategies, and to gather and exchange trade information among the French companies. It works closely with Unifrance to create and develop special events abroad, to promote French cinema and its sales agents' activity in international festivals and markets.

### **Association pour la Promotion de la Création Industrielle (APCI)**

<http://www.apci.asso.fr>

The APCI carries out and develops its numerous actions in France and abroad with the support of designers, companies and institutions, members of the APCI or occasional partners. One of its missions is ensuring the promotion of design in France and the promotion of French design abroad. The travelling Design Observateur (a touring showcase exhibition of selected French design works) is one of the main APCI tools for promoting French design abroad. Cities already visited by the Design Observateur - Athens, Bangkok, Belgrade, Brno, Budapest, Copenhagen, Gwangju, Helsinki, Johannesburg, Ljubljana, Montreal, Peking, Prague, Seoul, Shanghai, Sofia, Stockholm, Taipei, Tokyo.

### **bureauexport**

<http://www.french-music.org/>

Established in 1993, bureauexport is the music export bureau for the French music industry. It operates through a global network whose mission is to help French music professionals develop their artists internationally, covering all styles of music. bureauexport has offices in Berlin, London, New York, Tokyo, Sao Paulo and its central office in Paris. It offers services on a membership basis, including promotion, financial support for tours, advice, targeted professional meetings and visibility on French stands at the major international trade events. It publishes various reports and statistics. bureauexport receives a mix of public and private funding (including the Ministries of Culture and of Foreign Affairs, Ubifrance, and various music industry and music rights collecting bodies).

### **Bureau international de l'édition française (BIEF)**

<http://www.bief.org/>

BIEF is dedicated to the international promotion of French books. It provides an essential service to professionals in book publishing by facilitating publishers' projects for export development, rights sales and acquisitions, and international partnerships.

Its action has three main lines:

- A showcase for French publishing at book fairs throughout the world
- Scrutiny and analysis of international markets
- Connecting publishers all over the world through professional exchanges.

BIEF is funded by the French Ministries of Culture and of Foreign Affairs, as well as the Organisation internationale de la Francophonie. Many market studies and country profiles are available online.

### **Centre national du cinéma et de l'image animée (CNC)**

<http://www.cnc.fr/>

Among its missions, the CNC's Directorate of European and international affairs is responsible for:

- aiding exports
- promoting French films abroad along with the other ministries concerned, through specific support procedures (assistance in prospecting foreign markets; aid for foreign distribution; providing free copies for foreign distribution; dubbing & sub-titling)

The Directorate of European and international affairs also works closely with Unifrance films international, an association funded by the CNC in charge of promoting French cinema abroad. The CNC has a number of actions to support international co-productions.

### **FranceLivre – BookFrance**

<http://www.francelivre.org/eng>

Launched in 2012, FranceLivre, the first French website for a global audience, was founded by the Centre national du livre, in association with the Bureau international de l'édition française and l'Institut français. It is the single site for all book businesses and organisations. It provides publishing professionals abroad with support and guidance to acquire the translation rights for French works.

### **Institut Français**

<http://institutfrancais.com/>

Institut Français is the body responsible for the external cultural actions of France, working under the Ministry of Foreign Affairs. Its mission concerns cultural exchange, cultural diplomacy, dissemination of ideas, cultural diversity and partnership. While the Institut Français is the main body for the promotion of French culture and language abroad, with a number of relevant funding programmes, its international actions are not described within a framework of cultural export.

### **Ministère des Affaires étrangères : Direction Générale de la Mondialisation**

<http://www.diplomatie.gouv.fr/fr/enjeux-internationaux/cooperation-culturelle-et-medias/industries-culturelles-et/article/les-enjeux-80916>

Within the Ministry for Foreign Affairs, DG Mondialisation operates as a mediator between different branches of the CCIs; between these branches and the ministry's network abroad and between other actors in France and abroad. One of the objectives is to help reduce obstacles to import and export for CCI actors. Information on the ministry site on the CCIs mentions the tension between competition and cooperation between CCI actors, described as a relationship of « coopétition ». One of the stated challenges is the need for international positioning, in a context where the national market is often no longer adequate. There is thus a need for all branches of the CCIs, to different degrees, to reinforce their international strategy around market territories. According to the website, this involves reducing the various barriers to mobility of French cultural businesses.

### **OSEO**

<http://www.oseo.fr/>

OSEO, is a public-sector institution dedicated to economic development — and a key source of financing and other support for SMEs. It offers various financial measures to support export initiatives (loans - Prêt Pour l'Export /PPE and export credit guarantee facilities) which have been used, for example, in the film distribution business sector in France.

### **UBIFRANCE**

<http://www.ubifrance.fr/default.html>

The French Agency for International Business Development, UBIFRANCE has a large international network and supports French businesses to export and trade internationally. Among the designated business sectors it covers are Culture & Leisure, Audiovisual, Interior decoration, design.

### **Unifrance Films**

<http://www.unifrance.org/>

Unifrance is the organisation in charge of promoting French cinema throughout the world. Created in 1949, it operates under the supervision of the CNC (Centre national du cinéma et de l'image animée). Since it started, Unifrance Films International has carried out studies of international markets and their evolution and offers professionals access to market guides for major international film markets. It accompanies French films on the international market, from sale to distribution. Unifrance is a membership organisation, with different services and representation councils for producers; directors, actors & authors; and film exporters.

## **Germany**

In recent years, most of the 16 regional states in Germany and a number of cities have conducted Cultural Industries Reports. Listings below document initiatives in Berlin and Nord-Rhein-Westfalia. Information on other regional initiatives, with links to publications can be found here:

<http://www.kultur-kreativ-wirtschaft.de/KuK/Navigation/Initiative/bundeslaender.html>

### **Berlin Partner**

<http://www.berlin-partner.de/en/marketing/marketing-creative-industries.html>

This initiative is focused both on inward investment (encouraging investors to choose Berlin as the best place to start a business and support business retention in the city) and on exporting support for local businesses (advice on foreign trade and how local businesses can access new markets abroad).

The creative industries benefit from a particular marketing focus. Berlin's reputation as a "Creative City" is growing across the world, and it has become one of the location's main advantages in promoting the city's business development. Berlin Partner therefore organises events in Berlin (Fashion Week, Music Week, Web Week) and promotional events abroad ([Berlin Days](#) have been organised in Paris, India, China, Australia, Brussels, Copenhagen, Istanbul and New York).

#### **Creative City Berlin**

<http://www.creative-city-berlin.de/en/>

A portal for the cultural sector and creative industries in Berlin, it provides information in German and English on the full range of support measures for CCI businesses, as well as acting as a promotional tool.

#### **Creative. NRW**

<http://www.creative.nrw.de/>

The cultural and creative industries initiative of Nord-Rhein Westfalia state, Creative.NRW positions the sector as a jobs motor and one of the important economic sectors of NRW. The programme operates through cluster management with objectives that include developing an international presence for CCIs from NRW and improving export opportunities.

#### **Deutsches-Musik ExportBuro – The German Music Export Office**

<http://www.imh-deutschland.de/music/index.php>

The German Music Export Office was established in the year 2000 and belongs to the German Rock and Pop Music Association. The Export Office has two primary tasks:

- to increase consumer awareness abroad of the German music industry, its composers, writers and performers
- to augment the worldwide marketing and distribution of German music media

The Export Office accomplishes its tasks by providing numerous services to the German music industry as well as to German-music-interested parties abroad.

#### **FFA Filmförderungsanstalt (German Federal Film Board)**

<http://www.ffa.de/>

The FFA's duties include measures to promote German cinema, supporting the film industry in Germany, improving the foundations for the distribution and market-driven exploitation of the German cinema at home as well as its economic and cultural distribution abroad. It publishes statistics (Marktdaten) for German film production and distribution.

#### **German Films Service + Marketing**

<http://www.german-films.de/>

German Films Service + Marketing is the national information and advisory centre for the promotion of German films worldwide. It was established in 1954 under the name Export-Union of German Cinema as the umbrella association for the Association of German Feature Film Producers, the Association of New German Feature Film Producers and the Association of German Film Exporters, and operates today as a limited company, under the new name since 2004. It publishes *Market Studies* on the performance of German films around the world (cover 33 territories, including facts and figures about the theatrical, television, DVD and VOD markets in the territories surveyed). It undertakes distribution and promotion activity abroad.

#### **Initiativ Kultur- und Kreativwirtschaft**

<http://www.kultur-kreativ-wirtschaft.de/>

The Cultural and Creative Industries initiative of the Federal Ministry of Economics and Technology aims to enhance the competitiveness of businesses and professionals in the sector. The dedicated online portal (since 2010) profiles the sector and provides statistics and market information for the various sub-sectors. It does not have a particular international focus although this may be part of the business development approach. The 'Ausland & Export' section (under Business Know-How) contains some basic information for the fields of Architecture, Film & Visual Arts.



### **Initiative Musik**

<http://www.initiative-musik.de/en/3>

The Initiative Musik gGmbH is a funding agency set up by the German federal government to promote the music industry in Germany. It is supported by the German Collecting Society for Performance Rights (GVL) and the German Music Council. Financial support is provided by the GVL and the German Music Authors' Society (GEMA/GEMA Foundation). The core field of support is geared toward contemporary music, particularly Rock, Pop, and Jazz. One of the goals is the dissemination of German music abroad: "Our goal in disseminating German music abroad involves strengthening trade, brand awareness, and the actual presence and popularity of German artists and their music abroad".

### **iXPOS**

<http://www.ixpos.de/>

A service of Germany Trade & Invest, the iXPOS portal provides advice and information for German businesses wanting to export. More than 60 external trade institutions join in operating the German foreign trade internet portal "iXPOS". The information seems tailored to major industrial and economic sectors, although architecture is mentioned.

### **Kreativ Coaching Center**

<http://www.kcc-berlin.de/kcc.phtml>

An initiative for CCI businesses in Berlin, offering funding and coaching support for business development, KCC was developed in cooperation with the Investment Bank Berlin (IBB). IBB has a number of other support measures for CCI businesses and, through its Service Centre, it offers an 'Entering New Markets' grants programme.

### **Kulturstiftung des Bundes**

<http://www.kulturstiftung-des-bundes.de>

The German Federal Cultural Foundation promotes art and culture within the scope of federal competence. One of its main priorities is to support innovative programmes and projects on an international level. The focus is on cultural exchange and cross-border cooperation (not cultural export per se) and "all non-commercial fields and areas of cultural activity are eligible for funding, such as the fine arts, performing arts, literature, music, film, photography, architecture, cultural-historical exhibitions, new media, and related and cross-disciplinary art forms". The Foundation manages the German Cultural Promotion Funds which include the Arts Fund Foundation, the Performing Arts Fund, the German Literature Fund and the German Translator Fund.

### **Litrix**

<http://www.litrix.de/index.html>

Litrix.de is the Online Portal and Translation Program of the Goethe-Institut dedicated to the Worldwide Promotion of Contemporary German Literature. Litrix.de presents new publications from the German book market, selected by a jury of critics on a regular basis. Information is provided in English and German and the Translation Promotion Program has a rolling biennial focus language. Currently Russian, the previous focus languages were Spanish, Portuguese, Chinese and Arabic.

### **Network for Architecture Exchange (NAX)**

<http://www.architecturexport.de/>

In 2002 the Federal Chamber of German Architects (Bundesarchitektenkammer - BAK) founded the Network for Architecture Exchange NAX (Netzwerk Architecturexport - NAX) for promoting the activities of German and foreign architects working abroad and for supporting internationally active developers and investors in their search for suitable architects and urban planners. Relevant foreign trade information is provided under Country profiles.



## **Greece**

### **Greek Film Center**

<http://www.gfc.gr/index.php?lang=en>

The aims of the Organization are: “the protection, support and development of the art of film in Greece” and “the presentation, promulgation and promotion of Greek films both at home and abroad”. Through its international arm, Hellas Film, the GFC participates in the leading European programmes that aim to promote and sell European films worldwide. The organisation is present at major festivals and film markets around the world.

## **Hungary**

### **Hungarian Books and Translations Office**

<http://pim.hu/object.5297bee7-7c3d-4423-be7d-8f605811844f.ivy>

Hungarian Books & Translations Office carries on the activities of the Hungarian Book Foundation. Its aim is to promote classical and contemporary Hungarian authors' works (both fiction and non-fiction) abroad, to cooperate with foreign publishing houses and to take part in financing the translation costs. To do so, the PIM – Hungarian Books & Translations Office issues calls for cooperation for foreign publishers, serves as an information centre for publishers and translators, runs foreign-language webpages about Hungarian literature and attends international book fairs.

### **Magyar Filmunió**

<http://filmunio.hu>

Magyar Filmunió was established in 1992 by the Motion Picture Public Foundation of Hungary for the promotion of the Hungarian cinematography throughout the world. Since 2011, it has been operating as the International Division of the Hungarian National Film Fund. Among other activities, it organises the participation of Hungarian films at international film festivals.

## **Ireland**

### **Culture Ireland**

<http://www.cultureireland.ie/>

Culture Ireland is the national body for the promotion of Irish arts worldwide. It creates and supports opportunities for Irish artists and companies to present and promote their work at strategic international festivals and venues. It develops platforms to present outstanding Irish creative work to international audiences through showcases at key global arts events including the Edinburgh Festivals and Venice Biennales, as well as through special initiatives such as the recently concluded Imagine Ireland initiative in the United States.

### **Enterprise Ireland**

<http://www.enterprise-ireland.com/en/>

Enterprise Ireland is the government organisation responsible for the development and growth of Irish enterprises in world markets. It provides export advice and support to businesses in Ireland, including CCIs.

### **Imagine Ireland**

<http://www.imagineireland.ie/>

Imagine Ireland, Culture Ireland's year of Irish arts in America in 2011, supported the production of over five hundred events in a year-long celebration of Irish creativity and artistic talent.

### **Ireland Literature Exchange**

<http://www.irelandliterature.com/>

Ireland Literature Exchange (ILE) is the national organisation for the international promotion of Irish literature, in English and Irish. Since it began in 1994 ILE has funded the translation of over 1,500

works of Irish literature into 50 languages around the world, increasing the accessibility of Irish literature. ILE represents Irish writers at international events, book fairs and festivals.

#### **Irish Film Board**

<http://www.irishfilmboard.ie/>

IFB is the national development agency for the Irish film industry investing in talent, creativity and enterprise. The agency supports and promotes the Irish film industry and the use of Ireland as a location for international production. Among other support measures, for export the IFB provides:

- International development loans: funding for Irish Producers to enable them to participate in the development of high profile feature films and TV projects initiated by overseas producers.
- International publicity: funding guidelines are due to be published shortly

#### **Music from Ireland**

<http://www.musicfromireland.org/>

Music from Ireland (MFI) is the international arm of First Music Contact, a Dublin-based music resource organisation for pop and rock bands and solo artists. Culture Ireland has been working in partnership with First Music Contact since 2007 in the presentation, promotion and representation of Ireland and Irish music at key international music industry showcases.

### **Italy**

#### **Cinecittà Luce - Filmitalia**

<http://www.filmitalia.org/>

Filmitalia S.p.a. is the *Cinecittà Holding* group company created to promote Italian cinema abroad, and increase the distribution of Italian films on the International market. Functioning under the patronage of the *Ministry of Culture-Direction Cinema*, Filmitalia plays a leading role in the promotion of Italian audiovisual production. Filmitalia's activities include collaboration with all of the major international film festivals like Cannes, Berlin, Venice, Toronto, Shanghai, Locarno, New York and London (it is involved in over 100 international festivals), promotions at major international film markets and organisation of numerous events in countries with strong commercial potential (e.g. Festival of Italian Cinema in Japan, Open Roads – New Italian Cinema in New York).

### **Latvia**

#### **National Film Centre of Latvia**

<http://www.nfc.lv/news/>

The Centre's functions include promoting the distribution of films from Latvia around the world. It publishes a catalogue of Latvian films, compiles annual film statistics and participates in the Baltic films initiative.

### **Lithuania**

#### **Ministry of Culture**

<http://www.lrkmlt/go.php/lt/English>

The International Relations and European Affairs Department is responsible for policy related to international cooperation and promotion of national culture abroad, and organising its implementation. The arts policy is geared to the export of original artistic highlights that would be in line with international intellectual and creative processes, be in demand from abroad, challenge preconceptions, and help shape national identity without explicitly setting out to do so. The participation of Lithuania in international book fairs as a guest country is especially important for the whole cultural sector, when an opportunity is provided to present not only the book culture, but also that of the whole country: its arts, photography, theatre, music, and culinary heritage. As a guest country, Lithuania has participated already in the international book fairs of Frankfurt (2002), Goteborg (2005), Turin (2007), Jerusalem (in 2009) and Bologna (2011).

## **Luxembourg**

### **Centre national de l'audiovisuel**

<http://www.cna.public.lu/>

The CNA mission includes the promotion of Luxembourg audiovisual creation in general, including international promotion.

### **Film Fund Luxembourg**

<http://en.filmfund.lu/>

Film Fund Luxembourg offers different support mechanisms for audiovisual productions carried out by a Luxembourg registered film production company.

### **Ministère de la Culture**

<http://www.mc.public.lu/index.html>

The Luxembourg Ministry of Culture offers a number of funding mechanisms to support the international touring and promotion of arts and artists from Luxembourg. The Federation of Editors of Luxembourg Books participates in international book fairs with support of the Ministry of Culture.

## **Malta**

### **Creative Malta**

<http://www.creativemalta.gov.mt/internationalisation>

<http://www.creativemalta.gov.mt/internationalisation/exporting-creative-malta>

Creative Malta presents the National Strategy for the Cultural and Creative Industries. A key objective is to position Malta as an attractive, contemporary and stimulating creative hub within the Mediterranean region, with strong emphasis on exchange and access to international markets. Data on cultural exports are available on the site, as well as a SWOT analysis of Malta's current position. Exporting Creative Malta proposes various initiatives including strengthening financial and fiscal incentives aimed at enabling creative producers to internationalise their products and services, Maltese participation in large international events such as book Fairs, Design Festivals and Film Pitching sessions and a Cultural Diplomacy Fund.

## **Netherlands**

### **Amsterdam Economic Board**

<http://www.iamsterdam.com/nl-NL/Business/Amsterdam-Economic-Board>

This city body for Amsterdam provides strategic business support, both in terms of inward investment (information in English) and business development abroad for Amsterdam companies (information in Dutch). The Creative Industries are identified as a particular cluster, with strategies for growth and development, based on studies undertaken.

### **Buma Cultuur**

<http://www.bumacultuur.nl/en>

Buma Cultuur is dedicated to music from the Netherlands, founded by the Dutch collecting society Buma. It supports and promotes Dutch music copyright in both The Netherlands and key export markets for Dutch music. The aim is to increase the percentage of Dutch music in the Dutch market and to raise revenue flow by stimulating the use of Dutch music copyright on foreign markets.

### **CLICKNL**

<http://www.clicknl.nl/>

The new funding programme and information platform for the Dutch creative industries focused on entrepreneurship and innovation, CLICK NL was created through the designation of the creative sector by the government as a top sector for growth potential and specific investment.

### **Creative Factory**

<http://www.creativefactory.nl/>

Creative Factory in Rotterdam is a project that brings together creative and business companies in one building to help them grow faster through partnerships. It is cited as a good practice example in the KEA study for CREA.RE, *Measuring Economic Impact of CCIs Policies*, in particular for the outcome of successful collaboration with university students based on active participation, e.g. export projects for creative goods.

### **Dutch Design Fashion Architecture (DutchDFA)**

<http://www.dutchdfa.com/>

The DutchDFA programme aims to strengthen the international position of Dutch design, fashion and architecture, by building long-lasting international partnerships, while addressing issues facing today's world through design. The four-year strategic programme (2009-2012) takes place in a selection of focus countries (India, China, Germany and Turkey). A selection of research relevant to the internationalisation of Dutch design has been undertaken. One interesting strategy is the setting up of dedicated Dutch Design Workspaces in [Mumbai](#) and [Shanghai](#), offering a home base for visiting Dutch designers wanting to set up partnerships and enter the Indian and Chinese markets. The [Dutch Design Desk Europe](#) is based in Maastricht and helps Dutch firms of the creative sector (Design, Fashion, Architecture, New media, etc.) to find German business partners. The [Dutch Design Desk Istanbul](#) is for Dutch designers and design companies aiming to enter the Turkish market and for Turkish parties interested in collaborating with Dutch designers. The Dutch DFA programme is a joint public-private initiative, supported by the Dutch Ministries of Economic Affairs, Agriculture & Innovation, of Education, Culture & Science and of Foreign Affairs. Involved are the sector-specific organisations Premisla, Dutch Institute for Design and Fashion, and the Netherlands Architecture Institute; professional branch associations BNO, BNA, BNI, and MODINT; and the Dutch creative hubs of Amsterdam, Arnhem, Eindhoven, Rotterdam, The Hague and Utrecht. The future of the programme is under review after 2012.

### **Dutch Foundation for Literature – Nederlands Letterenfonds**

<http://www.letterenfonds.nl/>

The Dutch Foundation for Literature supports writers and translators and promotes Dutch literature abroad. It offers grants for writers, translators, publishers and festivals, and contributes to the production and distribution of Dutch and Frisian literature at home and abroad. In the past two decades, Dutch literature and the Dutch book have featured as the focal theme of organized literary events at many international book fairs, such as those in Frankfurt (1993), Barcelona (1995), Gothenburg (1997), London (1999), Tokyo (2000), Turin (2001), Paris (2003) and the Beijing International Book Fair in 2011, where the Netherlands was the country of honour. The Foundation for Dutch Literature annually invites a number of 'guest editors' to come to Amsterdam, to meet publishers, authors and translators, arranging appointments for its visitors with Dutch publishers. Every year, a number of editors from leading foreign publishing firms are invited to visit Amsterdam within the framework of the Amsterdam Fellowship for International Publishers (AFIP) so they can familiarise themselves with Dutch literature and the Dutch book trade.

### **EYE International**

<http://international.eyefilm.nl/homepage.html>

The new institute for film in the Netherlands, since 2010, EYE Film Institute Netherlands unites *Holland Film*, the *Filmbank*, the *Dutch Institute for Filmeducation* and the *Filmmuseum* in one organisation. EYE International (former *Holland Film*) is responsible for the international marketing & promotion of Dutch films. It offers a wide variety of services for Dutch filmmakers and producers to enhance the perception and visibility of Dutch filmmaking worldwide. EYE is involved in every stage in the life of a Dutch film abroad, from its selection at a recognized film festival to its presentation at an international market.

### **Federation of Dutch Creative Industries**

<http://dutchcreativeindustries.com/>

Created in 2009, Dutch Creative Industries represents an alliance of sector bodies.

### **Government of the Netherlands: Entrepreneurship and Innovation strategy**

<http://www.government.nl/issues/entrepreneurship-and-innovation/investing-in-top-sectors/creative-industry>

<http://www.top-sectoren.nl/creatieveindustrie>

The government has earmarked the creative sector as a top sector in view of its current strong position and scope for growth. The government, industry and science will target investment in this sector. A top team has been created for each top sector. It comprises a scientist, a senior official, an innovative SME entrepreneur and a standard bearer for the sector.

### **Music Centre of the Netherlands**

<http://www.muzyiekcentrumnederland.nl/en/about-mcn/>

MCN ran the successful MusicXport.nl (MXP) programme to improve the international position of Dutch bands and to enlarge their possibilities in foreign countries. However, MCN is losing its subsidy and the organisation is currently in liquidation. MCN is working hard to ensure that its international activities are continued after 2012, by working with two other organisations, Theater Instituut Nederland (also closing at the end of 2012) and Bureau Promotie Podiumkunsten, an existing marketing organisation for the performing arts. The aim is a new bureau which will be dedicated to the collective international promotion of the Dutch performing arts, including all styles of music. A decision is due in autumn 2012 about future international promotion activities.

### **Netherlands Film Fund**

<http://www.filmfonds.nl/nieuws/extra-pagina-s/english>

The Netherlands Film Fund is the national agency responsible for supporting film production in the Netherlands. It offers support for international co-production involving Dutch partners and film market promotions and provides grants towards international distribution costs and dubbing support for Dutch feature films to enable international market distribution. NFF publishes annual 'Film Facts and Figures' with information on international distribution of Dutch films.

### **Premsele Netherlands Institute for Design and Fashion**

<http://www.premsele.org/en/>

From 2013, the Netherlands Architecture Institute (NAi); Premsele, the Netherlands Institute for Design and Fashion; and Virtueel Platform (the sector institute for e-culture) will merge to form a new institute for architecture, design and e-culture. One of the new institute's objectives will be:

National and international promotion. The institute will organise and encourage promotion, international exchanges, and representation at important international events, such as biennials and fairs. Instruments will include the International Visitors' Programme, international exhibitions, and business matchmaking.

### **SICA Dutch Centre for International Activities**

<http://sica.nl/en>

SICA Dutch Centre for International Cultural Activities promotes the Dutch cultural sector's international activities and ambitions and creates a platform for opinion forming on international cultural policy. It also provides information and advice on funding possibilities, networks, regions and visas for all artistic disciplines. SICA acts as the implementing body for the Dutch Ministry of Education, Culture and Science and the Dutch Ministry of Foreign Affairs. SICA serves as the gateway to the Dutch cultural sector for Dutch embassies and cultural organisations abroad.

## Poland

### **Adam Mickiewicz Institute**

<http://www.iam.pl/>

Adam Mickiewicz Institute is a state cultural institution whose task is to promote Polish culture around the world and actively participate in international cultural exchange. The main goal is to increase the value of Poland's brand as a cultural asset and boosting Poland's effectiveness and efficiency in the area of culture.

### **Polish Film Institute**

<http://www.pisf.pl/pl>

The Institute was established in 2005. Its principal task is to provide the Polish film industry with a modern mechanism of support – from the development of film projects, through production, to promotion, distribution and circulation of Polish and European films. It supports films from concept to screening, with particular emphasis on international co-productions. The International Relations Department takes care of foreign promotion of Polish cinematography and international cooperation. Its tasks include: submitting Polish films to festivals, cooperation with diplomatic institutions, publication of promotional materials, presenting Poland at international festivals, and supporting international film events with the participation of Polish and foreign filmmakers.

### **The Book Institute**

<http://www.bookinstitute.pl/>

The Book Institute is a national institution established by the Polish Ministry of Culture in 2004. One of its aims is to promote Polish literature worldwide. It organises literary programmes to promote Polish books at national and international book fairs.

## Portugal

### **ADDICT Creative Industries Portugal**

<http://addict.pt/>

ADDICT promotes the development of the creative industries by researching, informing and coordinating the sector. Support for the internationalisation of its associates/creative entrepreneurs is part of the organisation's core mission. Two export related actions are currently planned for 2013:

- Organisation of a trade mission to Brazil in early 2013, a project which has benefited from relations developed as a result of the Year of Portugal in Brazil in 2013: <http://www.addict.pt/pt/noticias/missao-empresarial-ao-brasil-em-2013-addict-quer-aproximar-industrias-criativas-ao-mercado-brasileiro/>
- Partnership with an associate organising a trade mission/trade fair participation in Macau: <http://www.addict.pt/calendario/detalhe.php?id=356>

### **AEP – Chamber of Commerce and Industry, Portugal**

<http://www.aeportugal.pt/>

AEP organises trade missions and provides export and internationalisation support, operating across all economic sectors in Portugal. It has exhibited at international trade fairs in fields such as jewellery, interior design and furniture.

### **aicep Portugal Global**

<http://www.portugalglobal.pt/EN/Pages/Home.aspx>

Trade & Investment Agency, under the Ministry for Foreign Affairs, was created in 2007 and focuses on encouraging the best foreign companies to invest in Portugal and contribute to the success of Portuguese companies abroad in their internationalization processes or export activities.



**ANJE - Associação Nacional de Jovens Empresários (National Association of Young Entrepreneurs)**

<http://www.anje.pt>

Established in 1986 and representing over 5,000 members, ANJE is active in internationalisation activity with trade missions to China and Mozambique on 2012 programme. Information on support for fashion, architecture and other creative industry sectors feature on its website. Offers grants to SMEs for trade fair participation and other internationalisation activity.

**APGA – Portuguese Association of Art Galleries**

<http://www.apga.pt/galerias/?id=4>

Under a protocol between APGA and the Ministry of Culture, grants are available to APGA members for internationalisation, through their participation in selected international contemporary art fairs. The list of fairs for which grants were available in 2011 were: ARCO, Madrid; ARMORY, New York; ZONA MACO, Mexico City; ART BRUSSELS; São Paulo ARTE; ART BASEL, Basel; ARTFORUM, Berlin; FRIEZE, London; FIAC, Paris; ARTISSIMA, Turin; ART BASEL MIAMI BEACH, Miami.

**DG Artes**

<http://www.dgartes.pt/contents.php?month=8&year=2012&sectionID=159&sectionParentID=27&lang=pt>

Apoio à Internacionalização das Artes 2012: grant programme offering support for internationalisation of the arts, including touring and project development.

**DGLB - General Directorate for Book and Libraries**

<http://www.iplb.pt/sites/DGLB/English/livro/divulgacaoEstrangeiro/Pages/EdicaoEstrangeiroNew.aspx>

The DGLB promotes a series of actions for the dissemination of Portuguese literature abroad, and the promotion of Portuguese authors and African authors from the Portuguese speaking countries:

- Organizes a translation grant program that funds the translation of literature from Portugal and the Portuguese speaking African countries into foreign languages;
- Funds the publication of Portuguese illustrated books for children and comic strip in foreign countries;
- Provides financial support for the publication of Portuguese authors in Brazil,
- Supports the presence of the authors in international residences, festivals, book fairs and other literary events abroad;
- Attends the major world book fairs.

**GEPAC – Gabinete de Estratégia, Planeamento e Avaliação Culturais (Bureau for Planning, Evaluation and Strategy)**

Operating under the Secretary of State for Culture, GEPAC publishes a Guide of programmes and support for culture and creativity (*Guia de Apoios a Cultura e Criatividade*) which lists a number of internationalisation support measures.

**Instituto do Cinema e do Audiovisual - ICA**

<http://www.ica-ip.pt/pagina.aspx?pagina=558>

The Cinema and Audiovisual Institute for Portugal supports the creation, production, exploitation and dissemination in the area of cinema and audiovisual fields. It has offered support for participation in international festivals and markets but this programme did not run in 2012 due to change of government and financial crisis measures.

## Romania

**Romanian Film Promotion**

<http://www.romfilmpromotion.ro/>

Romanian Film Promotion is an NGO established in 2001, encouraged by Romanian National Film Center. It supports young filmmakers and promotes Romanian films across the country and abroad. It

publishes promotional information on Romanian films as well as a guide to promote Romania as a film location for foreign productions.

## **Slovakia**

### **Slovak Film Institute**

<http://www.sfu.sk/home.php>

The Foreign Department is in charge of the following promotion activities of the Slovak film abroad:

- Organizes festivals and retrospective screenings of Slovak films in the world and arranges the participation of Slovak (feature, documentary and animated) films in festivals abroad
- Invites filmmakers and manages their participation at various events
- Manages foreign language translation services for dialogues and comments to Slovak films
- Establishes and maintains contacts with partner film institutions abroad and with foreign cultural institutions in Slovakia.

## **Slovenia**

### **Slovenian Book Agency**

<http://jakrs.si/eng>

The Slovenian Book Agency strives to ensure that Slovenian publishing is represented at book fairs, particularly in Frankfurt, Leipzig and Bologna. It also organizes a translation seminar, attended by translators into Slovenian from across the globe. It prepares information for foreign publishers.

### **Slovenian Film Centre**

<http://www.film-center.si/>

The promotion of Slovenian film around the world is one of the main tasks of the Slovenian Film Centre. To this end the Centre occasionally organises retrospectives of Slovenian film abroad. It also presents Slovenian films at festivals worldwide. The Centre's tasks include:

- ensuring the promotion and exploitation of film and audiovisual activities in the Republic of Slovenia and abroad
- carrying out the tasks with regard to film location marketing in the territory of the Republic of Slovenia with the aim of encouraging economic development, set out in the annual work programme and financial plan.

## **Spain**

### **Barcelona Design Centre**

<http://www.bcd.es/en/page.asp?id=1>

It runs the BCN Design Export programme: <http://www.bcd.es/en/page.asp?id=143>, an internationalisation programme which aims to promote the Barcelona Design brand (products and services made in Barcelona), as well as Barcelona's professionals and companies through participation in fairs, conferences, missions and business bridges, and other promotional events in the design world.

### **Catalan! Arts**

<http://www.catalanarts.cat/web/?q=en/about/catalonia>

Catalan! Arts aims to identify and internationally disseminate the production of cultural companies based in Catalonia: record companies and labels, publishers, art galleries, performing arts companies, audio-visual and multimedia companies. Catalan! Arts was created in 2005 to respond to the need to promote the Catalan cultural industry at international fairs and markets and is hosted by ICEC Catalan Institute for the Catalan Companies, with a network of offices across Europe.

### **ICEX**

<http://www.icex.es>

Spanish government body for export and investment. The Cultural Industries are a designated sector with information and market reports.

### **Instituto de la Cinematografía y de las Artes Audiovisuales (ICAA)**

<http://www.mcu.es/cine/index>

ICAA is an autonomous body within the Ministry of Culture, financed solely by Government funds. It:

- regulates and gives financial support to cinematographic and audio-visual activities in Spain, i.e. production, distribution and exhibition of films;
- promotes Spanish cinema and audio-visual arts both nationally and internationally;
- promotes and supports participation of Spanish productions in festivals abroad and organizes events involving Spanish cinema in other countries;
- negotiates international co-production agreements, and represents Spanish cinema in co-production programmes and regional organisations.

### **Ministerio de Asuntos Exteriores y de Cooperación**

<http://www.maec.es/en/MenuPpal/Actualidad/NotasdePrensa/Paginas/28NP20110406EN.aspx>

The Ministry of Foreign Affairs and Cooperation presented with the then Ministry of Culture the first joint National Foreign Cultural Action Plan in April 2011. The plan establishes common strategies to internationalise the cultural and creative industries.

### **Secretaría de Estado de Cultura - Ministerio de Educación, Cultura y Deportes**

<http://www.mcu.es/>

Responsible for planning and implementation of cultural policy. Various programmes to support internationalisation of CCIs in Spain. The Ministry, with major governmental and other partners, contributed to [SPAIN arts & culture](#), a new showcase branding of cutting edge arts and culture from Spain across the USA in late 2012.

## **Sweden**

### **Export Music Sweden**

<http://www.exms.com/>

Export Music Sweden – ExMS – operates within the music industry to bring Swedish artists into commercial and cultural contact with players on the international music market. It supports and coordinates Swedish participation in international trade fairs, seminars, festivals and other such activities around the world.

### **Generator Swedish Creative Industries**

<http://generatorsverige.se/in-english>

Generator Swedish Creative Industries is a non-profit association devoted to developing and promoting the cultural and creative industries in Sweden.

### **Swedish Film Institute**

<http://www.sfi.se/>

The Swedish Film Institute Foundation works to promote film across the board – from idea to finished product, during launch in Sweden and around the world. The international department works in partnership with producers to provide funding for international launches of current Swedish feature, short and documentary films. In 2011 Swedish films were presented at major festivals across Europe, in the USA and Abu Dhabi. The Film Institute collects and publishes annual statistics on the Swedish film industry, including data on sales of Swedish film abroad.

## **United Kingdom**

### **Arts Council England**

<http://www.artscouncil.org.uk/funding/apply-for-funding/strategic-funding/grant-programmes/artists-international-development-fund/>

The Artists' international development programme is a £750,000 fund, jointly funded by the British Council and Arts Council England. The programme offers early stage development opportunities for individual freelance and self employed artists based in England to spend time building links with artists, organisations and/or creative producers in another country. The programme is for individual artists and, while not framed as cultural export support, it targets artists whose work will benefit from

launching better international networks - either artistically or in terms of developing an audience for their work and those who can demonstrate an interest in their work from an overseas partner/host.

#### **British Council**

<http://www.britishcouncil.org/>

The British Council creates international opportunities for the people of the UK and other countries.

The [British Council Creative and Cultural Economy](#) programme connects people who work in and inform the creative and cultural industries around the world with those in the UK. The Young Creative Entrepreneur (YCE) programme seeks to celebrate, support and connect emerging innovative and entrepreneurial leaders in the creative and cultural industries around the world.

[British Council Film](#) is the link between UK films and filmmakers and new international audiences. Together with the British Council's global network overseas it works to profile the innovation, diversity, creativity and excellence of British films around the world, and work to find opportunities for creative exchange between UK filmmakers and international counterparts.

In 2012, the British Council organised [UK Now](#), a major 8-month festival of British arts and creative industries in China.

#### **British Fashion Council**

<http://www.britishfashioncouncil.com/>

The British Fashion Council was formed in 1983. It showcases British designers and develops London's position as a major player in the international fashion arena. As a result, London Fashion Week ranks alongside New York, Milan and Paris as one of the 'Big Four'. It is committed to developing excellence and growth in a sector that is a significant contributor to the British economy, by nurturing, supporting and promoting British fashion talent to a global market.

#### **British Film Institute**

<http://industry.bfi.org.uk/>

The BFI is now the lead body for film in the UK which includes responsibility for funding film development and production; distribution and exhibition. The BFI publishes research into the economic impact of the UK film industry. Formerly under the UK Film Council (now closed, whose responsibilities have been taken on by the BFI) the Export development team supported the export of UK films, talent and services internationally. The Export Strategy set out by the UK Film Council included a range of initiatives, including identification of key export development territories.

#### **Creative England**

<http://www.creativeengland.co.uk/>

Creative England opened in 2011, with the core purpose of supporting the sustainable growth of independent creative businesses, and the talent that feeds them, in every part of England outside London. It is the first agency to provide dedicated support to Film, Television, Games and Digital & Creative Services in the English regions outside London.

#### **Creative Scotland**

<http://www.creativescotland.com/investment/international>

Over the next 10 years Scotland is seeking a step change in its ability to engage internationally and in its capacity to exploit the international market place. Creative Scotland has determined that there is a critical role for the creative and cultural sector to play in achieving this goal. The **International** programme has been designed to develop the skills and expertise of the sector, building knowledge, capacity and networks for the future.

#### **Design Business Association**

<http://www.dba.org.uk/>

A membership organisation providing a range of services to UK design businesses, including advice and training on export and international business development. DBA produces Country Guides, tips and case studies for the creative industries, available as free downloads and currently covering China, Brazil, Hong Kong, India, United Arab Emirates, USA and France. Business briefing events on particular export target countries are organised for members.

### **Film Export UK**

<http://www.filmexportuk.com/>

Film Export UK is the trade body for companies with UK offices selling, marketing & distributing independent feature films around the world.

### **Film London**

[http://filmlondon.org.uk/business\\_and\\_training/export\\_promotion](http://filmlondon.org.uk/business_and_training/export_promotion)

London UK Film Focus (LUFF) is a British export event that was created as an initiative for the promotion of British films and talent. The four-day annual showcase is for domestic and international buyers, and film festival directors. LUFF is the only event in the UK to support the export of completed UK films. Its primary funders are Film London and the BFI and it is produced in partnership with the Mayor of London, Film Export UK and UK Trade & Investment.

### **UK Trade & Investment**

<http://www.ukti.gov.uk/export/sectors/creativemedia.html>

UK Trade & Investment helps UK-based exporters succeed in international markets and assists overseas companies to bring high quality investment to the UK. It offers a wide range of export services to UK companies. During the London 2012 Olympic Games, it ran the British Business Embassy, with a series of industry-specific events. The [Global Business Summit on Creative Content](#) held on 31 July 2012 was a unique event focused on exploring the core theme of commercialising creativity in the international marketplace. The programme offered sessions on the UK's expertise and experience in commercialising creativity in the Fashion, Film, Games, Music, Publishing and TV sectors. [Creative & Media](#) is one of the industry sectors for the Export Programme of UKTI.

### **Wales Arts International**

<http://www.wai.org.uk>

Wales Arts International fosters international artistic excellence in Wales and ensures international impact and recognition for the arts and culture of Wales. The International Opportunities Fund offers grants to artists seeking to present work at significant international venues, events and showcases abroad.

## ANNEX 2

### CCI trade promotion events

This Annex presents a listing of some of the major international events where CCIs from EU Member States and elsewhere promote and present their products and services. The focus is on trade fairs and other international export promotion opportunities. The listing is compiled of events mentioned by national and regional bodies in the EU which support the export and internationalisation of the cultural and creative industries. In many cases, these are seen as the premier events in the industry sub-sector. Grants may be offered by the relevant national industry body or other export promotion agency for attendance, trade fair presentation, showcase promotions etc.

The listing is not intended to be comprehensive nor as a recommendation list; rather it intends to present a current snapshot of the most visible and quoted events.

### Audiovisual Sector / Film Festivals

There are a large number of international film festivals, with specialised events for documentary, short film, experimental, animation, children's cinema and feature films, among others.

Additional examples of international film festival participation supported by funding agencies:

2011 list of film festivals for which the Austrian culture ministry BM: UKK offers participation support: [http://www.bmukk.gv.at/medienpool/17799/festivalliste\\_2011.pdf](http://www.bmukk.gv.at/medienpool/17799/festivalliste_2011.pdf)

2011 film festivals for which Wallonie Bruxelles Images offers support for Belgian participation: [http://www.audiovisuel.cfwb.be/fileadmin/sites/avm/upload/avm\\_super\\_editor/avm\\_editor/documents/diffusion\\_et\\_promotion/Promo-dif\\_Regles\\_2011.pdf](http://www.audiovisuel.cfwb.be/fileadmin/sites/avm/upload/avm_super_editor/avm_editor/documents/diffusion_et_promotion/Promo-dif_Regles_2011.pdf)

FIAPF accredited film festivals: <http://www.fiapf.org/intfilmfestivals.asp>

#### Annecy International Animation Film Festival

<http://www.annecy.org/>

The Festival includes the Mifa International Animation Film Market which over the past 25 years has established itself as the leading event on the industry calendar.

#### Berlinale – International Filmfestspiele Berlin

<http://www.berlinale.de/en/HomePage.html>

The Berlinale is one of the most important dates for the international film industry. It includes the European Film Market and the Berlinale Co-Production Market.

#### CFC Worldwide Short Film Festival, Toronto

<http://worldwideshortfilmfest.com/>

Currently "on hiatus" under evaluation, following most recent festival in June 2012.

#### Festival de Cannes

<http://www.festival-cannes.fr/>

From a very early stage, the Festival de Cannes has placed an emphasis on its Marché du Film as a way of promoting the dual cultural and economic nature of cinema. Today, boasting in excess of 10,000 participants and 4,000 films, it is the world's leading market, serving to add dynamism to the global film industry.

#### MIPWorld

<http://www.mipworld.com/en/homepage/>

With MIPCOM and MIPTV, MIPWorld in Cannes is described as the world's greatest gathering in TV and Media. MIPCOM is the global content event where 12,500+ participants and 4,300+ buyers from 102 countries gather to create a new world of entertainment.



**Toronto International Film Festival**

<http://tiff.net/>

**Venice Film Festival**

<http://www.labiennale.org/en/cinema/>

## **Books & Publishing**

**Beijing International Book Fair**

<http://www.bibf.net/>

19<sup>th</sup> edition in 2012. The Netherlands was country of honour in 2011.

**Bologna Children's Book Fair**

<http://www.bookfair.bolognafiere.it/>

The most important international event for children's publishing and multimedia industry.

**Frankfurt Book Fair**

<http://www.frankfurt-book-fair.com/en/>

Major world event for the publishing industry with over 7,000 international exhibitors in 2012.

**London Book Fair**

<http://www.londonbookfair.co.uk/>

Global marketplace for rights negotiation and the sale and distribution of content across print, audio, TV, film and digital channels.

**São Paulo International Book Biennale**

<http://www.bienaldolivrosp.com.br/>

Forecast to attract more than 800,000 visitors in 2012.

## **Computer Games**

**gamescom**

Cologne, Germany

<http://www.gamescom-cologne.com>

Europe's biggest trade fair for interactive games and entertainment, gamescom is the epicentre for games and gamers and Europe's leading B2B entertainment trade fair. The entire industry will be presenting itself not only to the general public at the trade fair, but also to trade visitors.

**GDC – Game Developers Conference**

San Francisco, USA

<http://www.gdconf.com/>

The Game Developers Conference is the world's largest and longest-running professionals-only game industry event. It attracts over 19,000 attendees – programmers, artists, producers, game designers, audio professionals and business decision-makers. GDC events run in China and Cologne in 2012.

**Nordic Game**

Malmö, Sweden

<http://nordicgame.com/>

9<sup>th</sup> edition in 2012, Nordic Game conference is all about building: games, market knowledge, your skills, your network and your company. The conference is part of the Nordic Game Program.

**Tokyo Game Show**

<http://tgs.cesa.or.jp/english/>

22<sup>nd</sup> anniversary in 2012, TGS aims to become the world's largest event. Trade Fair, B2B activities attract over 220.000 visitors. Conferences include the TGS Forum and Asia Game Business Summit.

## **Design & Architecture**

In Fashion Design, the sector works intensively through 'Fashion Weeks' presenting the next season collections, most importantly Paris, Milan, London, New York and, increasingly, fashion weeks in Asia and elsewhere.

### **International Contemporary Furniture Fair**

New York

<http://www.icff.com/>

North America's premier showcase for contemporary design, in 2012 it attracted exhibitors from 34 countries.

### **Maison&Objet**

<http://www.maison-objet.com/>

A major international trade fair in the 'home-fashion' field, it attracts exhibitors from the design and contemporary crafts sectors. Takes place in Paris with over 85,000 professional visitors in 2012, including nearly half from outside France.

### **Prague Quadrennial of Performance Design and Space**

<http://www.pq.cz/index.html>

The Prague Quadrennial is held in Prague every four years since 1967. The main PQ event includes international meetings, exhibitions and projects, and supports the exploration of practical, theoretical, and curatorial aspects of contemporary performance design and scenography. The most recent Prague Quadrennial in 2011 attracted more than 40,000 visitors from over 70 countries.

### **SOFA CHICAGO**

<http://www.sofaexpo.com/>

International art fair presenting masterworks of contemporary and modern arts and design, it attracts galleries and contemporary craft showcase exhibitors.

### **Venice Architecture Biennale**

<http://www.labiennale.org/en/architecture/index.html>

## **Music**

### **Eurosonic Noorderslag**

Groningen, Netherlands

<http://festival.eurosonic-noorderslag.nl/en/>

Key exchange and networking platform for European music, European artists, international music industry and interactive professionals, companies and organisations, Eurosonic Noorderslag hosts over 3,000 delegates, showcases by 300 artists, a large conference programme and other events.

### **midem**

Cannes, France

<http://www.midem.com/>

For 46 years, midem has been the annual international b2b event dedicated to the new music ecosystem, with a tradeshow, conferences, competitions, networking events and live performances. 7,000 participants from 75 countries expected in 2013.

### **MUSEXPO**

Los Angeles, USA

<http://www.musexpo.net/>

Described as the “United Nations of Music and Media”.

### **Popkomm**

Berlin, Germany

<http://www.popkomm.de/en/>

The International Music Business Market, Popkomm is one of the largest international meeting places for the sector. While the focus is on Germany and Europe, Popkomm attracts exhibitors from the USA, Australia & South America. The Popkomm conference focuses on key music industry issues.

### **SXSW**

Austin, Texas, USA

<http://sxsw.com/>

The South by Southwest® (SXSW®) Conferences & Festivals offer the unique convergence of original music, independent films, and emerging technologies. The SXSW Trade Show is the heart of the converging industries experienced at SXSW, linking media, technology, creators and consumers.

### **The Great Escape**

Brighton, UK

<http://escapegreat.com/>

Since being founded in 2006, The Great Escape has been firmly established internationally as the leading event for showcasing new music.

### **WOMEX**

Nomadic European event: 2009-2011 – Copenhagen; 2012 – Thessaloniki; 2013 – Cardiff

<http://www.womex.com/>

The most important international professional market for world music of every kind, WOMEX brings together professionals from the fields of folk, roots, ethnic and traditional music with showcases, conference and a large trade fair. It also includes a film market for world music documentaries.

## **New Media**

### **Ars Electronica**

Linz, Austria

<http://www.aec.at>

The ARS ELECTRONICA FESTIVAL premiered in 1979 and has developed into one of the world's most important media art festivals. Several hundred network nomads, theoreticians, artists and technologists from all over the world convene in Linz each year, and about 550 journalists and bloggers report from the event.

### **Transmediale**

Berlin, Germany

<http://www.transmediale.de/>

transmediale is a Berlin-based festival and year-round project that draws out new connections between art, culture and technology. In the course of its 25 year history, the annual transmediale festival has turned into an essential event in the calendar of media art professionals, artists, activists and students from all over the world.

## **Performing Arts**

### **APAP**

New York, USA

<http://www.apapnyc.org/Pages/default.aspx>

APAP|NYC, the annual conference of the Association of Performing Arts Presenters, is the world's largest networking forum and marketplace for performing arts professionals. More than 3,500

presenters, artists, managers, agents and emerging arts leaders from 28 countries convene in New York City for five days of professional development, business deals and performances.

### **Festival d'Avignon**

Avignon, France

<http://www.festival-avignon.com/en/>

Founded in 1947 by Jean Vilar, the Avignon Festival is today one of the most important contemporary performing arts events in the world. Since 2004 the Directors have strengthened the links with Europe, making the Festival even more a crossroads of European culture. The Festival also accompanies the artistic teams in the technical and financial production of their work as well as in their circulation in France and abroad.

### **CINARS**

Montreal, Canada

<http://www.cinars.org/>

Since 1984, CINARS organizes every two years in Montreal, one of the most important international performing arts conferences in the world, with nearly 1000 professionals from 40 countries including 270 show presenters, some of the most influential in the business. For a week, over 100 shows from Quebec, Canada and abroad grace the stages while workshops, networking events, as well as an exhibition hall are teeming with participants. After 14 editions, the CINARS Biennale has become a key worldwide event in performing arts touring. The 15th edition of CINARS is in November 2012.

### **Edinburgh International Festival**

Scotland, UK

<http://www.eif.co.uk/>

The Festival has been continually ranked as one of the most important cultural celebrations in the world. Its annual programme features classical music, opera, theatre and dance. The EIF was founded in 1947.

### **Internationale tanzmesse nrw**

Dusseldorf, Germany

<http://www.tanzmesse-nrw.com/>

The internationale tanzmesse nrw is a biennial marketplace and festival platform for communicating and networking in the field of contemporary dance. Dance companies and artists present their work live on stage and choreographers, dancers, agencies, presenters and cultural institutions worldwide network in a lively marketplace. Over 1000 dance professionals from 42 countries attended in 2010.

### **Fira Tàrraga**

Catalonia, Spain

<http://www.firatarrega.cat/en>

A major international meeting point, showcase and business network opportunity for street theatre companies, productions, artists and festivals.

## **Visual Arts**

In the visual arts, the number of high profile Biennales, Triennales and Art Fairs in contemporary arts expands on an annual basis. New growth areas are in Asia, Latin America and the Gulf States with China, Hong Kong, Brazil, Argentina, Uruguay, United Arab Emirates, Singapore, Korea, India, Taiwan and Japan having a strong presence on the international visual arts map and vying with some of the older events to attract national presentations and gallery attendance from Europe. Good sources of up-to-date information on such events are:

Universes-in-Universe: <http://universes-in-universe.org/eng/index.html>

Asia Art Archive: <http://www.aaa.org.hk/>

**ARCO**

[http://www.ifema.es/ferias/arco/default2\\_i.html](http://www.ifema.es/ferias/arco/default2_i.html)

Madrid

**The Armory Show**

<http://www.thearmoryshow.com/>

New York

**Art Basel**

<http://basel.artbasel.com/>

Basel, Hong Kong, Miami

**Documenta**

<http://d13.documenta.de/>

Kassel, Germany

**FIAC – International Contemporary Art Fair**

<http://www.fiac.com/?lg=en>

Paris

**Frieze Art Fair**

<http://friezelondon.com/>

London

**Sao Paulo Bienal**

<http://www.bienal.org.br/fbsp/en/Pages/home.aspx>

Sao Paulo, Brazil

**Shanghai Biennale**

<http://www.shanghaibiennale.org/en>

China

**Venice Biennale**

<http://www.labiennale.org/en/art/index.html>

Italy

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