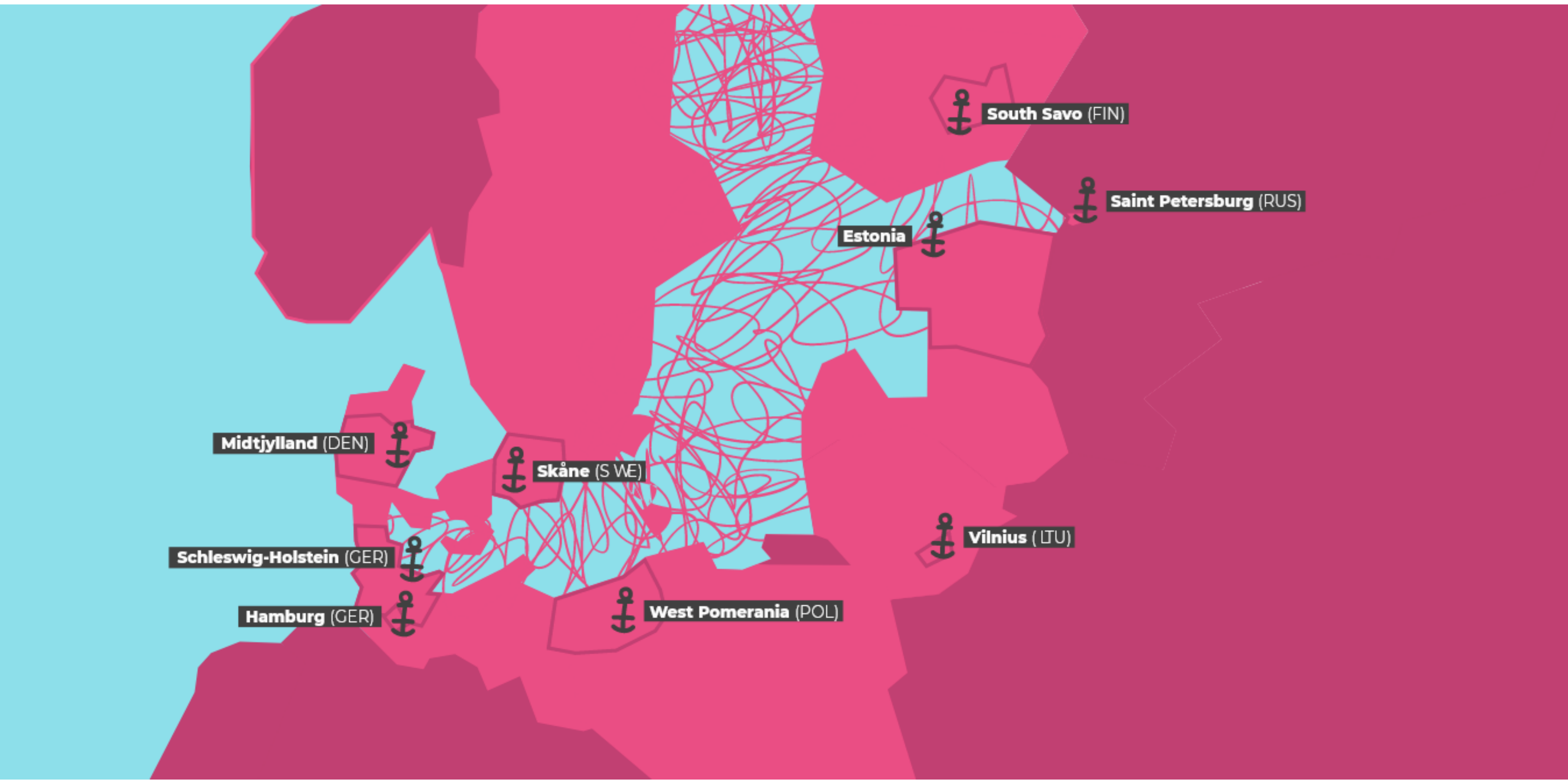
CULTURAL AND CREATIVE INDUSTRIES IN THE BALTIC SEA REGION

Analysis of nine regions participating in the Creative Ports project | 2021



Executive summary

This report is prepared in 2021 on the basis of the information collected within various activities during the Creative Ports project implementation. Creative Ports is a project funded by the Interreg Baltic Sea Region Programme of the European Union. It is a flagship project of the EU Strategy for the Baltic Sea Region (EUSBSR) and PA Culture. The project aims to improve and encourage collaboration between the Cultural and Creative Industries (CCI) actors of the participating countries and to further develop strategies and processes around internationalisation. Data presented in this report is collected during interviews with experts, partners of the Creative Ports project, publications and documents.

The aim of this report is to present consolidated information about Cultural and Creative sectors in 9 regions participating in the project (Saint Petersburg (Russian Federation), Estonia, Lithuania (Vilnius), South Savo region (Finland), Central Denmark region, Skåne region (Sweden), West-Pomerania region (Poland), Hamburg (Germany), and Schleswig-Holstein region (Germany).

Target audience of this document are bodies responsible for CCI support programmes in the partner regions, CCI support organisations, BSR wide CCI multipliers and sectoral networks within and beyond the partnership.

It is important to note that this report has been prepared during the COVID-19 pandemic, which affected Cultural and Creative Industries dramatically. Providing a realistic outlook and forecast in such conditions is a complicated task, given the instability and low predictability of the situation. This has to be taken into account when using the forecasts given in this report. From the Cultural and Creative Industries perspective, the current situation and post-COVID-19 area face enormous challenges, in particular the reassessment of cultural and creative work in a changing society and a new understanding of cultural reproduction, in the CCI and beyond.

BSR – Baltic Sea Region

CCI – Cultural and Creative Industries

GDP – Gross Domestic Product

GRP – Gross Regional Product

REDI - Regional Entrepreneurship and Development Index

SME – Small and medium size enterprises

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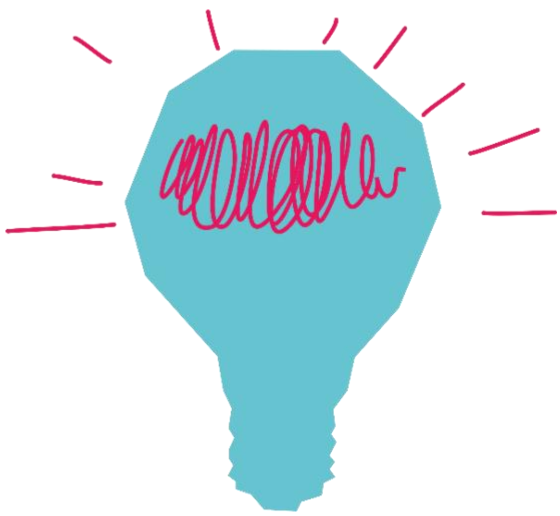

1. Overview of the BSR and its Cultural and Creative Industries (CCI)

Baltic Sea Region involves nine countries in the area that surrounds the Baltic Sea in Northern Europe. The countries that have shorelines along the Baltic Sea are Denmark, Estonia, Latvia, Finland, Germany, Lithuania, Poland, Russia, and Sweden (Figure 1). The Baltic Sea and countries surrounding it form a unique European macro-region, characterized by strong cooperation ties and competition (Palmowski, 2021). These nine countries of the Baltic Sea Region account for approximately 14% of the territory and 5% of the world's population. The region has a rich cultural heritage, as well as national and linguistic diversity and varied cultural and artistic production. The region also has some experience in cultural cooperation and exchange, as well as several professional networks in all sectors of society (NDPC, n.d.). At the same time leading international organisations of CCI have recognised that cultural and creative industries are at the core of the European identity, recognised as an indispensable driver of growth and jobs and cherished as facilitator of innovation throughout the economy (ECBN, 2020). CCI also spur innovation across the economy, as well as contribute to numerous other channels for positive social impact (well-being and health, education, inclusion, urban regeneration, etc.) (OECD, 2020). The region has great potential for tourism activities and cultural events, as it unites historical cities with outstanding cultural heritage. Each region has its unique and distinctive tourists' attractions (nature, castles, medical tourism, spa centres, etc.). Promotion and preservation of cultural assets is of high importance.

Fig.1 Map of the Baltic Sea Region
Source: Interreg Baltic Sea Programme

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1.1 Key figures & statistics

According to the EU Strategy for the Baltic Sea Region, the region unites eight EU Member States around the Baltic Sea, representing 80 million inhabitants or nearly 16 % of the EU population: 8 EU Member States: Estonia, Denmark, Finland, Germany (Berlin; Brandenburg; Hamburg; Mecklenburg-Vorpommern; Schleswig-Holstein), Latvia, Lithuania, Poland and Sweden. In addition, cooperation with non-EU countries from the region, namely Belarus, Iceland, Norway and Russia in actions and projects of common interest is welcomed (EUSBSR, n.d.). The sub-regions analysed in this report include: Saint Petersburg (Russian Federation), Estonia, Vilnius region (Lithuania), South Savo region (Finland), Central Denmark region, Skåne region (Sweden), West-Pomerania region (Poland), Hamburg (Germany), and Schleswig-Holstein region (Germany). Further in this chapter key figures and data for each sub-region is presented. In addition, in order to fulfil an important gap, data about Latvia has been provided, despite no region from Latvia and the country as a whole was not officially involved in Creative Ports project.

St. Petersburg, Russia

Key figures:

- Population – 5.38 mln people
- Territory - 1,439 km2
- GDP per inhabitant - €11,033 (2017)
- GDP growth rate - 1.4% (2017)
- Unemployment rate - 1.4% (May-July 2019)

St. Petersburg has most necessary prerequisites for the future development of CCI. There is a community of creative entrepreneurs and hubs, which is constantly expanding, as well as sites and facilities that can be adapted to the needs of CCI (3S Development, 2017). Cultural and creative industries have been actively developing since 2017: St. Petersburg's CCI contribute about 7% of the GRP and 10% of jobs within total industrial production of the region (Centre of Analytics, 2017). The most significant contributions to the city's economy come from theatres, film companies and art spaces, including architects, software developers and academics.
In 2019, the aggregate revenue of CCI organizations in St. Petersburg, according to the Agency of Strategic Initiatives, amounted to 12 billion EUR. GRP in 2019 amounted to 56 billion EUR. Of these, the architecture industry earned almost 5.2 billion; 2.7 billion - software developers/games industry;

1.5 billion - companies that are engaged in research and development in various fields (education, science, art, etc.). (Vylegzhanina, 2020)

Estonia

Key figures:

- Population – 1.32 mln people;
- Territory - 45,227 km2
- GDP per inhabitant - €19,737 (2018)
- GDP 3.9% growth (2018); unemployment rate - 5.0% (2019)
- Regional Entrepreneurship Development Index – REDI: 45.3 (2017)
- NUTS regional code: EE0 Estonia

The Estonian creative economy sector reflected the following features in 2019: the total revenue of the CCI sector is 1.481 million € (2.9% of GDP). 30,681 people (4.8% of the total employed in Estonia) work in the creative industries. 9,098 companies and institutions operate in the creative economy sector (11.6% of companies) (Pallok, 2020). Active growth is supported by municipalities for the sustainable development of this industry. CCI in Estonia aim to develop export potential by providing industry workers with opportunities to develop the television and film industry, which requires a high-skilled creative workforce: writers, artists, designers, actors, photographers, etc. (Siil, 2019).

Latvia

Key figures:

- Population - 1.92 mln people (2019)
- Territory - 64,559 km2
- GDP per capita - € 15,799 (2019)
- GDP growth rate - 2.8% (2019)
- Unemployment rate - 6.3% (2019)
- Regional Entrepreneurship Development Index (Latvia) – REDI: 39.3 (2019)
- NUTS regional code: LV0

In **Latvia**, CCI can be characterized as micro and small enterprises with few employees. In 2011 about 90% of creative industries enterprises were in micro-enterprise category, another around 5% are small enterprises (Baltija Konsultacijas, 2013).

CCI are characterized by intrinsic heterogeneity in terms of presentation of industries, types of business, economic performance, business management and resource requirements. This diversity poses challenges for the development of support tools suitable for the different needs of CCI.

During 2016-2020, the number of people employed in CCI has decreased by 25% (-12,287 people), The drop in the total number of people employed in CCI was significantly greater than in Latvia as a whole (25% and 14%, respectively). The average number of employees in a CCI company decreased from 9 to 5 in 2015-2019. This is caused by the fact that CCI narrowed their work (employing less people, working with less turnover), partly possibly because of the introduction of the micro tax, limiting the annual turnover to not more than € 96,000 and the maximum number of employees – 5 per enterprise. (Baltija Konsultacijas, 2013).

Vilnius region, Lithuania

Key figures:

- Population - 810,538 people (2019)
- Territory - 401 km2
- GDP per inhabitant - € 25,400 (2019)
- GDP growth rate - 4% (2019)
- Unemployment rate - 4.6 % (2018)
- Regional Entrepreneurship Development Index (Lithuania) – REDI: 32.8 (2017)
- NUTS regional code: LT011

In **Lithuania**, CCI are important for economic growth and development not only through job creation or increased economic activity, but also for their role in fostering economic evolution through their contribution to behavioural, social and institutional evolution. However, a baseline measurement can be made taking into account the role of CCI in job creation, GDP and export growth, which is typical for the Lithuanian CCI (NACCI, 2014). The strongest export areas of the Lithuanian CCI are publishing, music, cinema. There has seen a special growth also in the areas of new media and video game creation. Exports of products created by the creative industries account for 4.3% of total EU-27 external exports

(NACCI, 2014). Cultural and creative enterprises in Lithuania's GDP grew from 5.2% in 2009 to 5.3% in 2019. Creative and cultural enterprises grew by 8.3% in 2007-2017. The number of employees in this sector has grown by 7%. (Kregzdaite et al, 2017)

South Savo region, Finland

Key figures:

- Population - 143,744 people (2019)
- Territory - 18,768 km^2
- GDP per inhabitant - € 30,496 (2016)
- GDP growth rate - 2.8% (2016)
- Unemployment rate - 9% (2019)
- Regional Entrepreneurship Development Index (Northern and Eastern Finland) – REDI: 43.2 (2017)
- NUTS regional code: FI1

In **Finland**, CCI create added value of € 7.3 billion annually which accounts for 3.6% of GDP, while there are 135,000 people employed in the sector. Compared to other industries, CCI are characterized by a high number of entrepreneurs – 27% (CreativeFinland). South Savo region's share in Finland's financial and cultural resources forms about 2-6%. Region's share of SMEs' establishments of the region's value added amounted to 61% in 2018. In the same year, there were 1,338 persons employed in cultural and creative industries and 282 new enterprises established in the field of culture. Education and cultural activity operating costs amounted to € 275,208,000 and income was € 23,589,000 (Statistics Finland). In recent years, the main CCI sectors were newspapers and magazines, news agencies, printing, libraries, archives and museums, as well as artist, stage and concert activities.

Central Denmark Region

Key figures:

- Population – 1.31 million people
- Territory - 13,053 km^2
- GDP per inhabitant - € 32,400 (2016)
- GDP growth rate - 1.7% (2016)
- unemployment rate - 5.3% (2017)
- Regional Entrepreneurship Development Index (Denmark) – REDI: 58.2 (2017)
- NUTS regional code: DK04

In **Denmark**, in 2016 the creative sector employed 117,000 people (Erhvervsministeriet, 2019), approximately 3.9% of all privately employed persons. Central Denmark region accounted for more than 20.7% of the total Danish GDP in 2018, only behind the Capital Region of Denmark (Eurostat, 2020). Aarhus, Denmark's second-biggest city, is one of the country's largest business hubs with a multinational environment. Main industries include ICT, food, architecture, and design. In East Jutland region there are more than 50,000 people employed in creative sector (Aarhus 2017 Foundation, 2018). In 2017 Aarhus together with other municipalities of Central Denmark benefitted from being European Capital of Culture. This has led to increased investments in culture that generated value for the region for several areas. Since this time the interest and visitors (domestic and from abroad) have generated a turnover of € 156 million and 1,403 full-time jobs have been created in the Central Denmark Region. The gross value added increased by 81 million € in the Central Denmark Region. Public sector revenues increased by € 27 million EUR. Aarhus is a very international city with one of the highest concentrations of students in northern Europe - more than 50,000. Also, the city has the highest start-up survival rates in Denmark. For over 5 years, Aarhus start-ups have created more than 8,500 new jobs locally. This is ensured by advanced business support opportunities and easy procedures for establishing a business in Denmark. (Business Aarhus, 2019)

Region Skåne, Sweden

Key figures:

- Population – 1.36 mln people
- Territory - 10.968 km^2
- GDP per inhabitant - € 40,100 (2016)
- Unemployment rate - 7.1% (2018)
- NUTS regional code: SE224

In **Sweden**, CCI are making an ever-increasing contribution to Swedish exports. In September 2015 the government launched an export strategy with 22 initiatives aimed to increase Swedish exports and Sweden's attractiveness for investment, tourism and talent. One of the initiatives was to increase internationalisation in CCI and promote exports of cultural goods and services. In 2018, CCI in Skåne region represented 2.1% of the total business sector turnover, which corresponds to € 1.8 billion. Of the cultural and creative industries turnover, media accounts for more than half (58%) of Skåne's total turnover for that year. In addition, film, design and fashion make up sales of 24%. In 2016 all CCI companies of Skåne made up of 11.8% of CCI sector in Sweden (Tillväxtverket, 2016). In 2017 South Sweden had high youth unemployment rate (21.1%) (OECD, 2020).

West Pomerania Region, Poland

Key figures:

- Population – 1,7 mln people
- Territory - 22,897 km^2
- GDP per inhabitant - € 18,100 (2018)
- Unemployment rate - 7.8% (January 2019)
- Regional Entrepreneurship Development Index – REDI: PL 4 Północno-Zachodni: 51.5 (2017)
- NUTS regional code: PL42

In the **West Pomerania** region, there are about 3,950 people employed in the field of culture, entertainment and recreation, with the majority (3,650) working in the private sector, 245 people working in the public sector (Tomczyk & Spychalska-Wojtkiewicz, 2018). According to the Bureau of the General Statistical Office, in 2019 there were 800 design organizations (interior design, furniture design, art and design bureaus, graphic design, music production or advertising) and affiliates, which include: commercial organizations related to design, a culture that combines art and entrepreneurship. The main industries are advertising, publishing, television and film. The structure of these companies in terms of size is micro-enterprises with up to 9 employees. Industry mapping shows that these are mostly advertising companies.

Hamburg, Germany

Key figures:

- Population – 1.82 mln people
- Territory – 755 km²
- GDP per inhabitant - € 49,332 (2016)
- GDP growth rate - 2.4% (2016)
- Unemployment rate - 6.1% (2016)
- Regional Entrepreneurship Development Index (Hamburg) – REDI: 69.5 (2017)
- NUTS regional code: DE60 (NUTS 2)

Hamburg is the second largest City in Germany and besides Berlin and Bremen, among the few federal city states. Hamburg's CCI are among the most financially viable and dynamic in Germany due to high concentration of enterprises, for example, around 17,000 media companies in the advertising and publishing sector, in the cultural sector, print and broadcasting media, or in music, TV and film industries are established in Hamburg (Hamburg Chamber of Commerce, 2015). Since 2009, the total number of employees working in Hamburg's cultural and creative industries increased significantly by 14.3% (+5,965 employees) (Hamburg Chamber of Commerce, 2015).

About 134,000 people work in the field of culture and creativity in the Hamburg metropolitan area. This is 4.7% of all employed in the economy as a whole in Germany; 69% of them work in Hamburg. Lüneburg county accounts for 3.2%, Lübeck 2.8%, and the six direct suburbs of Hamburg together account for 14.1% of the workforce for 2019.

In 2019, sales in the cultural and artistic sector amounted to almost € 14.6 billion, with an added value of at least € 5.7 billion. It is important to note that 97% of this added value was created by self-employed people and companies with an annual turnover of more than

€ 17,500, that is, almost half of all self-employed people and companies in the field of culture and creativity. Sales of CCI has increased by 10% from 2012 to 2019. Added value has grown by 7%.

Thus, the main sphere of CCI is developed in the metropolitan area, i.e., companies with a turnover of more than € 17,500. The growth was driven by the Hamburg region, with a turnover increase of € 1.3 billion (+ 12%) and an increase in value added of € 328 million (+ 8 percent). In other sub-regions, growth in revenue and value added was significantly lower, and in some cases decreased in Germany. (Metropolregion Hamburg, n.d.)

Region Schleswig-Holstein, Germany

Key figures:

- Population - 2.89 mln people
- Territory - 15,763 km^2
- GDP per inhabitant - € 32,342 (2016)
- GDP growth rate - 1.2% (2016)
- Unemployment rate - 4.9% (2016)
- Regional Entrepreneurship Development Index – REDI: 47.0 (2017)
- NUTS regional code: DEF0 (NUTS 2)

The creative economy in the State of **Schleswig-Holstein** is an important economic factor with about 40,000 employees and a turnover of almost € 2.2 billion in 2019. One of the strongest and most dynamic CCI submarkets is software and games, applications and others. Most recently, it employed 6,600 people, which is about 18% of the workforce in the CCI in Schleswig-Holstein. Employment in this market grew by more than 30% from 2009 to 2017. This makes the software / games industry the second largest market after the press market in Germany. The third largest market is the design industry, which employs about 4,800 people. (Schleswig-Holstein state portal, 2021)

Overall, CCI in Schleswig-Holstein employ a large number of people, as evidenced by comparisons with other sectors of the economy. For example, less people work in food production and mechanical engineering industries. (Schleswig-Holstein state portal, 2021)

1.2 Defining the CCI and related activities (sub-industries)

There is no commonly accepted definition of CCI in the Baltic Sea Region. Several countries have a list of industries acknowledged in official documents, but not all of them. Often regions and countries in focus use the definition given by the United Kingdom Government's Department for Culture, Media and Sport (DCMS) as “those industries which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation through the generation and exploitation of intellectual property" ('Creative Industries Mapping Document', DCMS, 2001). Several CCI related definitions and concepts vary across the countries based on their history, legal system and traditions. This chapter gives an overview of the industries that regions classify as related to culture and creative sector.

In **Denmark** 11 business sectors together constitute the creative and cultural industries and each one represents a cohesive system of producers, associated businesses and services: architecture, books and press, design, film and video, digital content production and computers, arts and crafts, music, fashion and clothing, furniture and interior design, radio and TV, and advertising. (OECD, 2014)

Sweden has no single official definition of CCI. The most commonly used approach originates with The Knowledge Foundation (KK-stiftelsen) and includes architecture, computer and TV games, design, film, photography, the arts, literature, the media, marketing and communication, fashion, music, cuisine, scenic arts, tourism and experience-based learning. The definition of cultural and creative industries was originally developed by Region Skåne together with Sweco for the report entitled Cultural and Creative Industries 2016. The number of industry groups has been increased from seven to eight, with “Architecture” separated from “Form, Design and Fashion”. Incidentally, “Culture and Experience” includes libraries, archives, museum activities and cultural heritage institutions, along with amusement parks and botanical gardens which are also included in this industry group. The industry group “Literary and Artistic Creation’ brings together individual artists and writers. “Moving Image, Film and Photography” includes photo and film. The industry group “Media” covers all types of media such as printing, publishing of books, radio and advertising. “Performing arts” gathers activities such as music, dance and circus and finally “Game Development” includes publishing computer games. (Region Skåne, 2020)

In **Estonia** CCI sector officially includes architecture, audio-visual, design, entertainment ICT, publishing, music, art, cultural heritage, performing arts and advertising. In 2021 more sub-sectors are expected to be included.

In **Germany**, the definition is compatible with both the European core definition of the EU Commission (LEG Task Force Cultural Employment) and the worldwide reference model, the concept of British creative industries.

In 2009, the Conference of Economics Ministers (WMK) of the Bundesländer (Federal States) defined the concept of the cultural and creative industries as follows:

“The cultural and creative industries include those cultural and creative enterprises which are predominantly commercially orientated and are concerned with the creation, production, distribution and/or media distribution of cultural/creative goods and services. The unifying core of any cultural and creative-economic activity is the creative act of artistic, literary, cultural, musical, architectural or creative content, works, products, productions or services. This includes all creative acts, no matter whether in the form of an analogue unique piece, live performance and/or serial, or digital production or service. Creative acts may be protected by copyright (patent, copyright, trademark and designer rights) in a comprehensive sense".

In **Finland** there is no officially established definition of CCI, In a report published in 2018 by the Government of Finland, the creative industries were divided into four sections: creative and cultural products, creative content, creative services and actors focused on creative environments and platforms. The base for this categorization is the modified UNCTAD (United Nations Conference on Trade and Development) Creative Economy Network definition of creative sectors.

In **Saint-Petersburg (Russian Federation)**, the concept of CCI, which is used by the city authorities, largely corresponds to the UK approach and definition: “The creative industries include music, visual arts, cinema, performing arts, gallery business, fashion, publishing, advertising, design, architecture, the Internet and computer technology, and cultural tourism”.

Lithuania also follows the UK approach, as CCI are defined as “industry underpinned by types of activity-based on the creativity, ability and talent of an individual”. CCI include architecture, handicrafts, performing art, design, interactive computer programs, clothes design, the art and antiques

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market, music, movie and image production, publishing, television and radio, programing equipment and computer services, advertising. CCI in Lithuania do not include tourism, sport, museums, archives, heritage protection and other cultural activities - they belong to the category of cultural economics (Creative Metropoles, 2012)

In **West Pomerania region (Poland)** the discussion concerning which activities should be contained in the concept of creative industry has been going on for years. Following the definition of 'creative industry' adopted by the British government, it is commonly acknowledged that creative industries are "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property".

For a support structure there is no official definition. Within Creative Ports project it is defined as an organisation that operates as intermediary between a funding organisation and the end client that can be either an individual participating in CCI with his or her creative and artistic activities or an organisation/company operating in cultural and creative activities. In some countries the support organisations are funded by the state, in others by a local municipality or regional government while in some cases also private funding exists.

1.3 Existing support organisations and their role

This chapter gives and overview of the existing support opportunities in the regions as well as description of the most noticeable and active organizations.

CCI as a sector is emphasized in many EU strategies, publications and policy recommendations. Its importance and contribution to the development of innovations and society is recognized in every EU region. In the times of advanced digitalization some sub-sectors are extremely important to support. Paradoxically, now, during the COVID-19 crisis, the importance of the CCI increases and at the same time it is the most vulnerable sector.

CCI stimulate innovations and create spill-over effects creating benefits to other industries. CCI also contribute to positive social impact, by being active in such spheres as education, inclusion, urban regeneration, etc. (OECD, 2020). When looking at the current statistics, we notice that CCI are among the most affected by the current crisis, with jobs at risk ranging from 0.8 to 5.5% of employment in Europe (OECD, 2020).

Currently, in every analyzed region there are different support organizations aiding the development of CCI. Government as a support organization is most often represented by a specific ministry on a national level and/or an agency on the regional level. Networks, business hubs, accelerators, and agencies are the most popular type of organizations in the analyzed regions. Some of them are aimed at supporting businesses in general, some of them only offer help to the CCI organizations and others – to specific CCI subsectors (music, IT, design, etc.).

Overall, types of support can be characterized as regulatory, financial and institutional types. Regulatory support measures are provided by legal conditions. Financial support is the support offered in forms of grants and investments, loans and etc. Institutional type of support means support from various organizations providing services for businesses (consultations, mentoring, networking, education, etc.).

In **Central Denmark**, as well as in other regions, financial support distributed through autonomous art councils, independent cultural institutions and bodies are in place to maintain the independence of arts and culture from economic and political interests. According to Statistics Denmark, in 2020 the most publicly funded activities were in the fields of Media, Library and Literature and Sports and Recreation (Statistics Denmark, 2020).

In **Denmark**, CCI activities are in many cases financed fully or partly from public sources. The subsidies are divided between two levels of public administration: the central government and municipal councils. Regulatory, institutional and financial support is available. (UNESCO, 2016)

The Danish Arts Council, a governmental institution that provides financial support for promotion, and awards grants based on applications, such as the participation of Danish artists in events abroad and visiting programs for artistic or cultural representatives from abroad. The Danish Arts Council also supports the presentation of significant foreign art in Denmark through a grant-program for artists-in-residence called DIVA, and supports foreign artists in the visual arts, music, performing arts and literature, invited by Danish culture and arts institutions to work and exhibit locally.

In **Skåne (Sweden)** CCI are supported by private organizations with specialties and governmental support structures. For instance, the Creative Ports partner Media Evolution is one such private organization; it is an innovation centre for media development, providing incubation services open to several fields of business, and having sector expertise in creative, cultural and digital industries. The hub has a specialty in start-ups in the cultural sector and open innovation with industry.

The regional cultural plan for Skåne 2021-2024 focuses on five cross-cutting development areas that are common to the entire sector: participation and co-creation, artistic creation, rooms and places of culture, children and young people's inclusion, digital development. Region Skåne supports and develops culture by providing operational support to cultural actors and study associations, project support and special support. Project support can be distributed as production support, development support and thematic support. (Region Skåne, n.d.)

A national authority, Swedish Agency for Economic and Regional Growth (Tillväxtverket) is a national authority aiming to promote sustainable industrial development and regional growth; to strengthen the companies' competitiveness and implement the EU Structural Fund programs. Business Sweden is an organization jointly owned by the Government of Sweden and representatives from the Swedish business community, offering skills enhancement initiatives for internationalization. Business Sweden focuses on computer games, film, music, fashion, design, marketing communication and literature.

In **Estonia** CCI support organizations are mainly represented by incubators, mentoring entities and co-working spaces. The most popular specializations are IT, music, media and design. There are around 20 supporting organizations, which is quite a high number taking into account the size of the country.
In 2015, CCI support structures and companies were supported with € 193 million. The most important contributors to the creative sector are: Ministry of Culture, Estonian Cultural Endowment, Enterprise Estonia, Gambling Tax Council, in the case of libraries also the Ministry of Education and Research. Support is provided also by technological institutions like the Software Technology and Applications Competence Centre, Tartu Science Park, and the Smart City initiatives. Overall, in Estonia there are regulatory, financial and Institutional types of support are present.

In **Hamburg**, thanks to its strong economy and diversified economic structure, there are a lot of opportunities for young businesses. There are a lot of networks and events that enable startups to meet other start-up businesses, investors and potential partners or customers. Federal Government's cultural policy aims to ensure the integration the principles of participation and integration in cultural institutions sponsored by the Federal Government (The Federal Government Commissioner for Culture and the Media, 2018).

The Hamburg Chamber of Commerce offers businesses free consulting services and information aimed specifically to meet the needs of (young) entrepreneurs. These services include consulting and various informative events. Also, the Gründungswerkstatt Hamburg (Hamburg Start-up Workshop) offers an online tool to help business founders – develop and improve their business plan together with a personal tutor. (Hamburg Chamber of Commerce, 2015)

The Hamburg's film funding institution "Filmförderung Hamburg Schleswig-Holstein" contributes to stable development of the city's film and broadcasting industry. The institution connects and supports local companies and markets in order to raise interest of national and international production companies. (Hamburg Chamber of Commerce, 2015)

The opportunities for external funding for start-ups or companies that have already been active in the market for a while longer go far beyond those offered by traditional bank loans. Venture capital investors or crowdfunding are just a few examples. Extensive public financial aid is also available for start-ups and takeovers, as well as for companies looking to expand or consolidate their business.

In **Schleswig-Holstein (Germany)** the state's financial support is regulatory and is mostly based on legal requirements and funding guidelines.
The state supports outstanding institutions of arts and culture, promotes activities such as artistic festivals and projects that are aimed to protect cultural heritage or promote cultural education, as well as artist grants and socio-cultural initiatives. Innovative projects on new social developments also receive start-up aid from the state. The Service Agency for Cultural Funding Schleswig-Holstein particularly supports smaller and voluntary cultural actors in need of suitable funding.

One of the federal government supports initiative "Initiative Kultur- und Kreativwirtschaft" provides support for CCI by a range of measures, information and events. The support opportunities in Schleswig-Holstein as well as in the whole Germany are big and well established. All forms of possible support are present: networking, funding, incubators, accelerators, education, etc. It is complicated to present as an example or highlight one or several CCI support organizations, as the region has a big number of them. But one organization mentioned in the public official resources is the Digital Economy Schleswig-Holstein (DiWiSH) - a central network of the IT, media and design industry in Schleswig-Holstein. It unites more than 200 members and is partially financed by funds from the state's economic programme. The tasks of the DiWiSH cluster management are knowledge transfer & exchange of expertise, Employment & Location

Marketing, Cooperation & Projects, and Public Relations. (DiWiSH official website, 2021).

South-Savo (Finland) draws on Finland's strong cultural infrastructure. There is a broad consensus on central and local government level about providing culture with funding and support. A funding system for the sector is well-functioning, however, support and funding structures are lagging behind the development of some sectors and new activities. Various foundations are providing more funding for cultural activities, but there has been a decrease in other sources of private funding. At the same time, agencies have been subject to spending cuts, some of which have been quite substantial. (Ministry of Education and Culture, 2017)

CCI Support Organizations provide the following types of support: consulting, co-working, trainings and networks. Approximately € 448 million was allocated for the arts and culture in the 2019 Budget. Ministry of Education and Culture and its agencies in the framework of policy until 2030 will focus on supporting the foundations of culture and education in society (Ministry of Education and Culture, 2019.) Outside of the programme the Ministry supports product and service development, creative expertise, exports and market entries, and cultural tourism. Funding for arts and culture provided by the Ministry of Education and Culture and the Arts Promotion Centre, is aimed mainly to support the production of artistic contents.

To increase creative expertise, training is provided within projects funded by the centres for economic development. For cultural exports, the Ministry of Education and Culture provides knowledge exchange targeted at commodification, marketing, networking and branding for small enterprises in the field of culture. The commodification productisation of cultural tourism is supported by grants too (Ministry of Education and Culture, n.d.). In 2026, a Finnish city will become the European Capital of Culture and receive financial support from the Creative Europe programme. In June 2020, Savonlinna, a city of South Savo region, was one of the cities who proceeded in the evaluation process of the 2026 European Capital of Culture competition (Ministry of Education and Culture, n.d.).

In **Saint Petersburg (Russian Federation)** there are over 60 creative "spaces" acting as CCI support organizations, mainly represented by co-working facilities and creative clusters. All types of support are available for entrepreneurs, including funding, legislation and institutions. The most demanded business support organization in the region is the Center for the Development and Support of Entrepreneurship. It provides expert consulting assistance on all issues of business creation and development as well as financial support. The organization also includes a subdivision named the Center for the Development of Creative Industries, which areas of activities are: creation and improvement of an educational base for training and retraining of qualified personnel in industries, development of innovative educational programs, applied training, internships, etc.; development of networking mechanisms, etc.

The most noticeable government support measures for the industries provided by policies are provision of the reduced rental rates and supporting education and skills development activities. IT subsector is prioritized in strategic documents at national and regional levels. Privately owned support organizations are also present, but not to a large extent. One of the examples of such organization is the AGAT Foundation – a private non-profit foundation that offers free practical assistance for entrepreneurs: mentoring, loans up to approximately € 16,500 and business planning services. Big companies like YOTA, Microsoft Kaspersky Lab, etc. contribute to CCI support system by providing access to specialized labs and sharing their equipment.

In **Vilnius (Lithuania)** support measures are represented by start-up accelerators, consulting, networking services, grants and funding, incubation and space provision. Aiding actions are provided by governmental organizations and privately owned ones.
Lithuanian Council for Culture provides funding for culture and arts projects through the Culture Support Fund by offering culture and arts fields and programs. These programs are designed to support the culture of communities, dissemination of culture and arts in Lithuania and presentation of Lithuanian culture in foreign countries, promotion of international cooperation, giving meaning to historical and cultural memory (The Lithuanian Council for Culture, n.d.).

National Association of Creative and Cultural Industries of Lithuania, an umbrella organization that unites creative industry associations, incubators, individuals, institutions of higher education, cultural, creative business and many other organizations. It focuses on knowledge and competencies sharing and building, network creation and representation of companies (NACCI, n.d.)

A privately owned company Workland, which is registered in Estonia, but operating in Baltic countries, provides modern workspaces, professional support services and a supporting community for businesses to develop. Vilnius Factoring Company, a private lending company in Lithuania, withing an agreement with the European Investment Fund (EIF) offers microloans of up to €25,000. Lithuanian micro-enterprises with no more than 9 employees can get these funding opportunities under the EU Programme for Employment and Social Innovation (EaSI). Arts Printing House is an incubator with a priority for contemporary performing arts. Creatives can stay and work elsewhere temporarily by participating in artist-in-residence programs and other residency opportunities (working facilities, network, audience, etc.). (European Interest, 2021)

In **West Pomerania (Poland)** the organisations most engaged in supporting CCI in the region are incubators, accelerators and universities, communities and co-working spaces, providing all types of support. Significance of CCI development is acknowledged by Polish national strategic documents. For example, strategy Poland 2030 underlines the importance of the development of intellectual capital and the knowledge-based economy as crucial challenges that Poland needs to address. In 2018 public expenditures on culture and national heritage protection amounted to € 2.433 million (6.7% more in comparison to 2017 – 2.281 million EUR). The largest part of these expenditures was allocated to activities of museums (30.7%); protection and preservation of monuments and other historical monuments' protection activity (15.5%); and to activity of centres for culture and art (11.5%). From the local government units budgets, a majority of expenditures were spent on the activities of cultural centres and establishments, including clubs and community centres (30.7%); libraries (17.6%); museums (10.8%); and theatres (9.3%). (Statistics Poland, 2019).

The main tools for creating and disseminating knowledge in the Westpomerania region are: R&D investments, universities, technological cooperation between companies, diffusion of technologies, and broadband access. In the region, government support for SMEs is: talent development (making money on talents), education (training), investment (co-financing of training, studies, innovations), tax incentives, a digital one-stop shop, integration policy (one office representing specific interests), development of clusters (building nodes to reduce market access costs), access to finance for SMEs (cheap loans to reduce capital barriers), branding (brand establishment at a city and national level), market access (trade fairs, festivals and international trade), IP development (diplomatic and legal support).

While the public administration controls most support schemes, the co-working spaces are privately owned. Targeted funding opportunities, according to experts, are lacking. The main spots supporting CCIs in the area of Szczecin are the Academy of Art, and the cultural incubator, Technopark Pomerania where the ICT cluster is located. All of them are situated in Szczecin. There is also the department of Design at the Technical University in Koszalin.

Analysis of situations in the nine regions of the BSR has shown that to different extent all regions have all types of support and there are government and privately owned organizations. This means that CCI organizations have foundations for further development and growth. It is extremely important these days to provide financial support in different forms to the CCI to ensure their survival and therefore contribution to the recovery of economies. According to the experts, CCI in all regions can use regional and/or national level support programmes. Prioritized sub-sectors differ, but a trend towards supporting digitalization, media and software subsectors can be seen.

2. Challenges, opportunities, and measures for growth of the CCI in the BSR

According to OECD the cultural and creative sectors are, together with the tourism industry, among the most affected by the current COVID-19 crisis due to the sudden and massive loss of revenue opportunities. This is especially the case for more fragile players such as smaller companies and freelance professionals. At the same time, culture and creativity is ever more important for society. Cultural content contributes to mental health and well-being and is especially important when people are becoming more isolated during the contact and travel restrictions of society. For this reason, sustainable business models during and after the initial crisis are imperative, and the current challenge is to design public support instruments that alleviate the negative impacts in the short term and help identify new opportunities in the medium term for different public, private and non-profit actors engaged in cultural and creative production.

It has been recognized that the concept of cultural and creative industries encompasses many industries with different degrees of maturity, different potential and different market and production conditions. This means that the needs for the different industries look different, for example, regarding access to producers, agents and broker functions, sales channels, networks, meeting places etc. The rapid technological development and digitalisation have also led to the recognition that traditional business models are no longer functional for CCI. For instance, the games industry is probably the industry that has managed best as this industry is by its intrinsic nature based on digital form, while most of other industries have a hard time surviving, such as publishers and performing artists. And the hospitality industry, on the other hand, is characterized by the fact that it is often depending on an individual entrepreneur, such as an art gallery owner or food culture producer who implements an idea and who takes the entire risk while the environment changes due to spreading effects (e.g. COVID-19 pandemic) and the actors who have forced these changes do not take any risk themselves.

As expressed by CP project partner from **Skåne (Sweden)** they see that each individual sub-industry has its challenges, and the region needs to gather strength in these individual issues to meet these sub-industry-specific needs. For this purpose the regional support structures need to be linked together to become more flexible, faster and more supportive in order to create better conditions for exports for these industries.

In **Denmark** several companies move faster towards digitalization and their challenge here is how to transform so that their traditional customers will be also involved in newer digital solutions. As an example, a local company, *Useeum*, that places itself as 'an app company' by making digital solutions for museums, experienced an openness from international partners which chose these new digital solutions and now the company is experiencing that its business is thriving.

The similar challenges have been also experienced by the partner from **St. Petersburg (Russia)** where museums will become omni-channel, i.e., a combination of online and offline formats has become mandatory setting. Also, the competition between cinemas and streaming platforms will intensify, therefore, cinemas will have to choose their specialisation, they have to look for new formats (for example, car cinemas) as international streaming platforms have already become active players in the content production market.

Financial challenges are dominant among many companies in all partner regions. For example, in **South-Savo (Finland)** the challenge for many CCI companies is their small size and relatively small turnover, which has excluded them from applying for some of the financial measures. The sole entrepreneurs' challenging situation has been eased through measures that help them to access unemployment benefits without having to close their businesses and through small financial support (2,000 €) that is granted by municipalities. In Finland, nationwide, the Ministry of Education and Culture hands out support for creative industry, art, culture and cultural heritage communities. There are specific support measures, for example, the arts industry through which actors and organizations can create new services and exhibitions, but these do not cover monetary losses that have already taken place. But the challenges remain as there is a risk that CCI students will not be able to get necessary training and work experience, which would be negative for the industry as a whole.

In November 2020 **Lithuania** applied multiple measures – specific and general – to support cultural and creative sectors affected by COVID-19 pandemic. Specific measures to support CCI sectorwise are allocated to film industry, culture and art organizations, art professionals, music organisations, libraries, cultural organisations financed by the ministry of culture and municipal cultural organisations – altogether €75 million. Also, as a measure for self-employed residents whose economic activity is included in the list of economic activities most affected by COVID-19 (for example, photography, cinemas, museums, libraries, arts, creative activities, art objects' restoration etc.), this group will be exempted from default tax interest, and no tax recovery actions were initiated until 31 December 2020.

In **Germany** *Neustart Kultur* is a special national financing support beside other mechanisms. This rescue program (in amount of€1 billion) provides funding for a wide range of cultural and media sectors. The focus is primarily on cultural institutions that are predominantly privately financed. The aim is to enable them to reopen their venues and resume programs in order to offer artists and creative people prospects for employment and the future.

In **Schleswig-Holstein** special regional support has been granted to artists in the event industry and for freelancers in the cultural industry, also sold tickets have been compensated by the region's authorities for the events which were cancelled. According to Dümcke (2021), in recent years, almost all governments in Europe, including Germany, have promoted the CCI for their contribution to growth, innovation, entrepreneurship, tourism, social cohesion and identity. COVID-19 has now exposed many actors in all artistic, cultural and creative fields without exception as particularly vulnerable. The widespread switch to digital platforms and content in the "lockdown" has led to an increase in free cultural offers, changing the social evaluation of art and culture. Discussions are underway as to how to react to the changed post-corona "culture consumers".

Hardship of COVID-19 situation has also challenged **Estonia** where national support measures have been allocated to mitigate the impact of COVID-19 virus outbreak in cultural and audiovisual sector of the country. The region has recently approved a new set of strategies which covers also the CCI. Within the National Research, Development and Innovation Plan, knowledge transfer and the business environment will be under focus for 2021-2035 while the "Culture 2030" development plan underlines culture and creativity as core values in the society. The national development strategy "Estonia 2035" envisions the region as innovative, trustworthy, caring and people centered.

The challenges exposed in the BSR region by the partners of the project show that COVID-19 crisis has caused enormous revenue losses and unemployment in CCI. In order to survive and manage in the future the application of sustainable business models is necessary. In the current situation that lasts already for the second year this can happen through carefully designed public supports, where the financial input comes from regional and national level. This kind of support has to take into account different sub-industries and their specifics, thereby common efforts of several support structures and organisations are necessary to meet the expectations of CCI.

Education and training of new creative persons in universities and other educational institutions in different formats cannot be stopped, this can have serious consequences to CCI and society in general. As cultural and creative industries have started to transform into new and different formats, the challenge will be also to start to understand the needs and expectations of the people who can be labeled as ‘post-corona culture consumers’ as the return to pre-corona settings seems unfortunately very unlikely in most of CCI activities.

Challenges and opportunities of CCI are summarized in Table 1.

Table 1. Challenges and opportunities of CCI in the Baltic Sea Region

Challenges	Opportunities
to design public support instruments	sustainable business models
needs for the different industries look different	competition between cinemas and streaming platforms will intensify
traditional business models are no longer functional for CCI	measures that help entrepreneurs to access unemployment benefits
to transform to involve traditional customers in newer digital solutions	specific measures to support CCI sector wise are allocated
financial challenges	tax recovery measure for self-employed residents
CCI students will not be able to get necessary training and work experience	special regional support has been granted to artists in the event industry and for freelancers in the cultural industry
focus is primarily on cultural institutions that are predominantly privately financed	knowledge transfer and the business environment will be under focus for 2021-2035
CCI development and values need to be recognized as ‘system relevant’	“Culture 2030” development plan underlines culture and creativity as core values in the society
missing solutions for specific cases where general policies cnnot be applied	strategy “Estonia 2035” envisions the region as innovative, trustworthy, caring and people-centered

3. Foresights of the CCI in BSR

This chapter provides an overview of possible developments in the state of CCI in the regions in question based on the data provided by the partner organizations of the Creative Ports project. The data was collected during interviews, project meetings and communication with project partners. Documents analysis has been also carried out.

2020 was in many ways a dramatic year that changed the conditions for all parts of society. The opportunities in fostering the collaboration of CCI with traditional sectors of industry hold the potential for cross-innovation which cannot be neglected when sustainable development, securing employment opportunities and large-scale transformations are in focus.

We have to note that the different sub-sectors in the CCI vary greatly in terms of size and development. This is why, it has been understood that for the CCI its core of value creation is based on cultural creation, cultural competences and creative processes, rather than based on one common business logic. The CCI consists of industry groups that differ from each other according to their business activities. It is therefore always challenging to do the foresight analysis. The parts affect the whole. It is often difficult to identify the reason for a particular development by looking only at the cultural and creative industries as a whole. A broader view is necessary.

A foresight for the future will be that cross innovation will play an important role to capitalise on the untapped potential in integrating CCI and other industries. For example, in **Sweden** where health and social development structure *Region Skåne* is taking a leading role with the regional development agency called *Innovation Skåne* (which has already a dialogue with the regional authority *Cultural Administration* via the large EU project "Cross4Health") and the industry organizations. The *Cultural Administration* (that acts under guidelines of regional culture council called *Culture Committee*) also has close relations with *Kreativ Gesellschaft* in Hamburg, which runs an EU-funded project on the theme of Cross Innovation and is building a cross-border European network around this. *Region Skåne* can contribute to developing production and innovation ecosystems and meeting places for CCI companies. The *Culture Committee* already finances a number of such (the collective workshops, the Ceramic Center and the Ifö Center) and there is a potential in strengthening and developing them so that they have even more meeting opportunities through new collaboration hubs. They can also be a clearer resource in the above-mentioned Cross Innovation where altogether European, regional, municipal, CCI and industry dimensions become integrated. According to the NDPC recent study, including 121 companies which were questioned across the BSR in 2020, 35% noted that they had experienced cross innovation for several decades already. The same study also confirmed that 38% of the companies who participated benefitted from public support. (NDPC, 2021).

In order to avoid the collapse of the cultural ecosystem, **Germany** has progressively adapted support measures and developed strategic interventions, such as a Voucher system that was initiated already in March 2020 accompanied by tax measures and bridging aid. Also, salaries of workers in public cultural organisations are being paid via the "cultural worker fund" (*Kurzarbeitergeld*) and *Neustart Kultur* already mentioned before (Dümcke, 2021).

For the South-Savo region in Finland the short-term perspective as envisioned by the support organizations sees that the crisis will continue to affect **South-Savo's** CCI sector negatively. The effect will be strong on micro entrepreneurs and freelancers in particular despite financial resources which have been allocated locally and nationwide. For 2021 a key project for developing South-Savo's CCI is Savonlinna's application to be a Capital of Culture in 2026. The success of this project is seen to be vital for the region. In general, the support organizations forecast more internationalization for the industry in the longer term, which means that re-building the industry will mean having to build new competencies and infrastructure, which will require lots of work, time and resources. Hence, the industry will not bounce back in the same form as was before COVID-19. There is a risk that today's CCI students will not be able to get necessary training, internship and work experience, which would be negative for the industry as a whole.

At the same time according to Ministry of Economics of Finland (European Creative Business Network, 2021) currently the universities have continuously a role in CCI innovation while at the same time because of digitalization the companies have much more to do with innovation than before. Several technical (e.g. IT, VR, AR) solutions and services with data access possibilities empower the companies to innovate much easier than a couple of years ago. These processes were ongoing already before the pandemic, but their implementation within CCI has become much more crucial today.

Based on the developments in the Baltic Sea Region countries, and their regions, but also in other countries globally, the following forecasts for longer term, about content and perspectives by sectors can be made.

Longer term perspective of CCI can be described by the following foresights:

- There will be acceleration of the industry digitalization in general (including CCI). Thereby traditionally "analogue" sectors such as theaters, museums and cultural centers will be under focus.
- Hybrid models and multi-channel forms of performing artists are the options for future developments. However, the online format will never replace the offline one in sectors where emotions and personal presence are important (e.g. performances, concerts).
- The role of culture will change: cultural objects will help to take care of the psychological health and emotional state of people in addition to entertainment, leisure and educational functions.
- Convergence and collaboration between CCI: the emergence of new professional associations, the adoption of technologies (for example, video game technologies in museums and cinema), which will lead to an increase in diversity and the emergence of new formats. (OECD 2020a).

Forecast about new practices of content production and consumption:

- Demand for online content will grow, at the same time the share of paid online content will increase because of growing demand.
- Offline formats return slowly due to health concerns (of performers and audience). At the same time, offline content in the short term will be focused more on the needs of local users.
- As the demand for personalized and interactive content will grow, it places additional pressure on data security and personal safety issues which become more sensitive than now.
- The number of intermediaries between the content creators and the consumers will be reduced. Performers will communicate more directly with the viewers, earning on contributions from stream visitors and developing video blogging skills.
- Professions in demand: content and media design specialists, screenwriters, technical directors, digital marketers, community managers, culture managers (curators, producers). (OECD, 2020a)

Forecast by the sectors:

- Performing arts – digital concerts and performances will not replace live performances, but they will also find their audience. New types of interactive formats will emerge: virtual halls, cross-platform formats, integration into a virtual gaming environment (Rogers, 2020).
- Movie industry – as competition between cinemas and streaming platforms will intensify the cinemas will have to choose specialization and look for new formats (European Parliament, 2020).

- Fashion – as awareness among consumers will raise in respect of sustainability and circular economy in general – the number of collections will decrease, the trend for resale and second-hand will increase, demand for virtual clothes will increase (CRPP, 2021).
- Museums will start mostly operating in omnichannel setting. As a result, communication with their audience will go beyond the boundaries of just visiting the museum and continues beyond it (social networks, live broadcasts, games, quizzes, podcasts, interactive exhibitions, etc.). (Useeum, 2021; UNESCO, 2021).

4. Conclusions and recommendations

Within this chapter the authors would like to give some recommendations based upon the COVID-19 measures taken and CCI related situation in the Baltic Sea Region. Based on the above presented challenges and forecasts, one of the key strategies for all the CCI in the BSR and elsewhere will remain supporting of the development of CCI companies so that they survive the pandemic. It is important not to let them just to wait and put all their hope on external support. Since the spring of 2020 a lot of companies and staff who lead these have been changed their approach already, there are successful examples as we know from the BSR sub-regions presented above. For example, as an outcome of Creative FLIP project, cultural & creative professionals build the bridge with students of all types of educational institutions in 11 European countries (FLIP, 2021). At the same time larger and smaller companies need different type of support. This support needs to be targeted; specific support networks have to be created for smaller companies.

At the same time the regional support organisations need to be linked to reach international business opportunities for internationalisation for their CCIs. Transnational cross innovation (between CCI and other industries) will be one of the possible channels for that, while digitalization will act as a tool to facilitate the ongoing CCI internationalization processes. In parallel not only specific training programs, but also full innovative entrepreneurship modules which involve competences in cross innovation for CCI are under preparation. These study programs are targeted for bachelor and master level students who need to be educated with skills both of management and arts competences in order to become a successful intermediary after completing these studies (LoovEesti, 2021).

Our regional examples show that while all countries provide financial aid for private persons or companies, still their reopening remains challenging. New forms which have been forecasted have already become reality despite some sectors/activities are stronger influenced than others. Regional and national strategies focus in some cases on the issues related to the continuity of higher level CCI related education (South-Savo), also on providing new digital and international skills to all levels of pupils and students in order to meet the needs which have arisen and to manage with the competition (Vilnius). These are valuable signs of long-term perspective strategies. Estonia's strategies point out in addition to modern technical skills also the values like caring, tolerance and humanity. These have to be linked to broader international activities together with inevitable digitalization processes in the industry.

On the European level ECBN is and will be one of the leading transnational organisations where experiences of the countries or regions are shared all over Europe and beyond. At the same time the Interreg Baltic Sea Region project Creative Ports has established a strong and vital network from 9 regions around the Baltic Sea. Learning modules as main outcomes of this project are published in order to support the internationalization efforts of CCI support organisations in the Baltic Sea region and elsewhere. In addition, the project created CCI Contact Desk, a body acting as a hub for new contacts and exchange of knowledge. It operates as an entry point providing international connections and offers guidance to help CCI find the right internationalisation tools.
A full set of recommemdations for public authorities and decision makers to adjust and improve CCI policies, strategies and support schemes is published under: https://www.creativeports.eu/tools-resources/policy-recommendations

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Creative Ports is a project part-financed by the Interreg Baltic Sea Region programme from January 2019 to December 2021. The views expressed in this publication are the sole responsibility of the authors named and do not necessarily reflect the views of the European Commission or of the Managing Authority/Joint Secretariat.

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Creative Ports is a flagship project of the EU Strategy for the Baltic Sea Region.