

Creative Economy Outlook 2022

*The International Year of Creative Economy for Sustainable Development:
Pathway to resilient creative industries*



**United
Nations**

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Foreword

The creative economy is one of the world's fastest-growing sectors. Creative industries create employment and income, promote innovation and contribute to societies' well-being. Yet more data and innovative and multidisciplinary policy responses are needed to enhance the development impacts of the creative sector. This is essential, as the creative economy provides all countries, particularly developing economies, with a feasible option for development.

The Bridgetown Covenant, adopted at the fifteenth session of the United Nations Conference on Trade and Development, mandated UNCTAD to support developing countries in diversifying production and exports in the creative sector, analyse the creative industries and provide insight into the global creative economy as a means to support countries in exploiting the potential the sector presents. Furthermore, in United Nations General Assembly resolution 74/198 on the International Year of Creative Economy for Sustainable Development, UNCTAD was requested to inform the General Assembly at its seventy-seventh session on the implementation of the resolution, through a dedicated section of the *Creative Economy Outlook*.

This new report offers insights into the survey carried out by UNCTAD with member States on the creative economy highlighting institutional arrangements and national plans and strategies for 33 countries. The findings show how the creative economy has become a sector of growing social, political, and economic importance.

International trade in creative goods and services generates increasing revenues for countries, but creative services exports vastly exceed those of creative goods. The global exports of creative goods represented US\$524 million in 2020, while world exports of creative services reached US\$1.1 trillion. In addition, UNCTAD estimates that, in 2020, creative goods and services represented 3 and 21 per cent of total merchandise and services exports, respectively. The report also shows that creative services were more resilient during the COVID-19 pandemic than other services sectors.

South-South trade in creative goods has almost doubled in the past two decades. In 2020, South-South trade in creative goods represented 40.5 per cent of creative exports by developing economies. On the other hand, developed economies mainly tend to exchange cultural goods among themselves. South-South trade can be important for developing economies to create new trading opportunities and diversify exports.

The report is published at a time when the global community faces some of the most significant challenges in decades: the COVID-19 (coronavirus disease) pandemic, looming climate change and environmental crisis, geopolitical tensions and a major cost-of-living crisis. Despite these challenges, the creative economy remains a critical sector for sustainable development.

It is my hope that this report will provide crucial data for strengthening the creative sector and its contribution towards inclusive economic development.



Rebeca Grynspan
Secretary-General of UNCTAD

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The publication builds on valuable contributions of member States and organizations across the United Nations, including the Food and Agriculture Organization (FAO), International Labour Organization (ILO), International Trade Centre (ITC), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Industrial Development Organization (UNIDO), World Intellectual Property Organization (WIPO), and World Trade Organization (WTO). These contributions showcase the implementation of the International Year of Creative Economy 2021 and how it advances the 2030 Agenda.

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Abbreviations and acronyms

AR/VR	augmented reality/virtual reality
B2B	business-to-business
B2C	business-to-consumer
CCI	cultural and creative industries
COVID-19	Coronavirus disease of 2019
CPC	Central Product Classification
DCMS	Department for Culture, Media and Sport of the United Kingdom
EBOPS	Extended Balance of Payments Services Classification
FAO	Food and Agriculture Organization
G20	Group of Twenty
GATS	General Agreement on Trade in Services
GDP	gross domestic product
GIAHS	Globally Important Agricultural Heritage Systems Programme
GVA	gross value added
HS	Harmonized System
IDB	Inter-American Development Bank
IPR	intellectual property rights
ISIC	International Standard Industrial Classification
ITC	International Trade Centre
IYoCE	International Year of the Creative Economy
LDC	least developed country
MSMEs	micro-, small and medium-sized enterprises
NAICS	North American Industry Classification System
NGO	non-governmental organization
OECD	Organisation for Economic Co-operation and Development
SACO	South African Cultural Observatory
SDGs	Sustainable Development Goals
SIDS	small island developing States
SMEs	small and medium-sized enterprises
UNCTAD	United Nations Conference for Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNIDO	United Nations Industrial Development Organization
US\$	United States dollar
WIPO	World Intellectual Property Organization
WTO	World Trade Organization



Overview

The definition of what constitutes part of the creative economy is still evolving

The notion of creativity and creative economy is evolving. The definition of creativity builds on the interplay between human creativity, ideas, intellectual property, knowledge, and technology, while creative economy encompasses all the industries relying on creative activities. The concept of the creative economy is closely linked with the “knowledge economy,” a key driver of endogenous growth through investment in human capital.

Definitions vary vastly between countries and international organizations. For example, the Inter-American Development Bank (IDB) defines the creative (or orange) economy as “the group of activities through which ideas are transformed into cultural and creative goods and services whose value is or could be protected by intellectual property rights (IPRs).”¹ The United Nations Educational, Scientific and Cultural Organization (UNESCO) focuses on the social and economic dimensions of culture defined according to the concepts of cultural and related domains and the culture cycle.² The World Intellectual Property Organization (WIPO) concentrates on the importance of copyright and categorizes industries according to the extent to which their activities depend on copyright.³

UNCTAD defines creative industries as cycles of creating, producing, and distributing goods and services that use creativity and intellectual capital as primary inputs. They comprise a set of knowledge-based activities that produce tangible goods and intangible intellectual or artistic services with creative content, economic value, and market objectives. The creative economy offers a feasible development option to all countries and in particular to developing economies. More data and innovative and multidisciplinary policy responses are needed to enhance the development impacts of the creative sector.

The creative economy is vital for sustainable development

The 2021 International Year of Creative Economy put creative economy front and centre at a time when creative solutions are needed to overcome global challenges. As highlighted in the United Nations General Assembly resolution 74/198,⁴ the creative economy is contributing to the Sustainable Development Goals (SDGs) in multiply ways, especially to Goals 1 (no poverty), 5 (gender equality), 8 (decent work and economic growth), 9 (industry, innovation, and infrastructure), 10 (reduced inequalities), 11 (sustainable cities), 12 (sustainable consumption and production patterns), 16 (peaceful and inclusive societies) and 17 (means of implementation and global partnerships).

Indeed, cultural and creative industries significantly contribute to the world economy. The cultural sector accounts for 3.1 per cent of global gross domestic product (GDP),⁵ while UNCTAD estimates that in 2020, creative goods and services represented 3 and 21 per cent of total merchandise and services exports, respectively. In addition, cultural and creative industries provide 6.2 per cent of all employment, generating nearly 50 million jobs worldwide,⁶ and employ more young people (15–29-year-olds) than other sectors. The creative economy promotes social inclusion, cultural diversity, and human development. These factors place creative industries as crucial sectors for achieving the 2030 agenda.

Nevertheless, the COVID-19 pandemic had a devastating impact on certain creative industries and deepened their pre-existing vulnerabilities. Reports indicate that during this period, as many as 10 million jobs disappeared from the cultural and creative sectors, which contracted by US\$ 750 billion globally in 2020.⁷ A comparative study about the impact of COVID-19 on the creative sector in Africa showed that the most vulnerable sectors were performing arts, visual arts, and the heritage sector. These sectors have high levels of informality, a high proportion of freelancers, and increased use of short-term contracts.⁸ In addition, companies are of micro and small size, and face-to-face interactions are essential.

Recognizing the creative economy's growing social, political, and economic significance, countries apply different approaches to support its development

In 2021, in the context of the implementation of General Assembly resolution 74/198 on the International Year of Creative Economy, UNCTAD conducted an online survey on the creative economy and creative industries. The responses from 33 countries⁹ provide insights on how the creative economy has become a sector of growing social, political, and economic significance at the national level.

Almost all countries that responded to the survey have at least one entity in charge of the creative economy and creative industries. Still, no two countries are alike in their institutional arrangements. In most countries, several agencies have shared the responsibility of the sector. Countries such as Canada, the Central African Republic, Colombia, Georgia, Germany, Honduras, Nicaragua, Panama, Peru, Slovenia, Turkey, and United Arab Emirates have a single national ministry, vice-ministry, or agency with overall responsibility for the creative economy. Most countries split duties for the creative industries across multiple ministries and agencies, such as ministries of culture, sports, heritage, tourism, youth, trade, foreign affairs, intellectual property, telecommunications, innovation, and education.

Since 2015, the issuance of national strategies, policies and regulations of the sector has rapidly spread throughout the developing world. Most respondent countries established a specific strategy or national plan to support and develop creative industries at the national level. However, national strategies and plans often apply different definitions of what constitutes the creative economy. Among the respondent countries, Cambodia, Central African Republic, Honduras, Latvia, and Trinidad and Tobago were the quickest to recognize the creative economy's social, economic, and political significance. They developed national strategies and plans to develop their creative industries from the mid-2000s to the mid-2010s. Other countries developed their strategies and plans during the second half of the 2010s. In addition, multiple countries drafted national plans for their creative industries in 2020 and 2021 as an integral part of their post-COVID-19 recovery plan.

Countries have increasingly turned their attention to capturing the economic contribution of their creative industries. They produce various statistics about the creative economy, such as contribution to GDP, the share of creative goods and services from total exports and imports, the number of employed persons and enterprises in the creative sector, and participation in culture. Although some countries have adopted similar statistical methodologies, the lack of yearly reporting and divergent definitions and methods applied in different countries make international comparisons difficult. Moreover, whereas reporting on cultural and creative industries (CCIs) in some countries tends to be sporadic, in others, it occurs regularly (*i.e.*, Canada). Some respondents, like Azerbaijan and Georgia, cooperated with UNESCO to estimate their creative economy's economic contribution. Others, like Trinidad and Tobago or Turkey, developed studies with WIPO about the economic contribution of copyright-based industries.

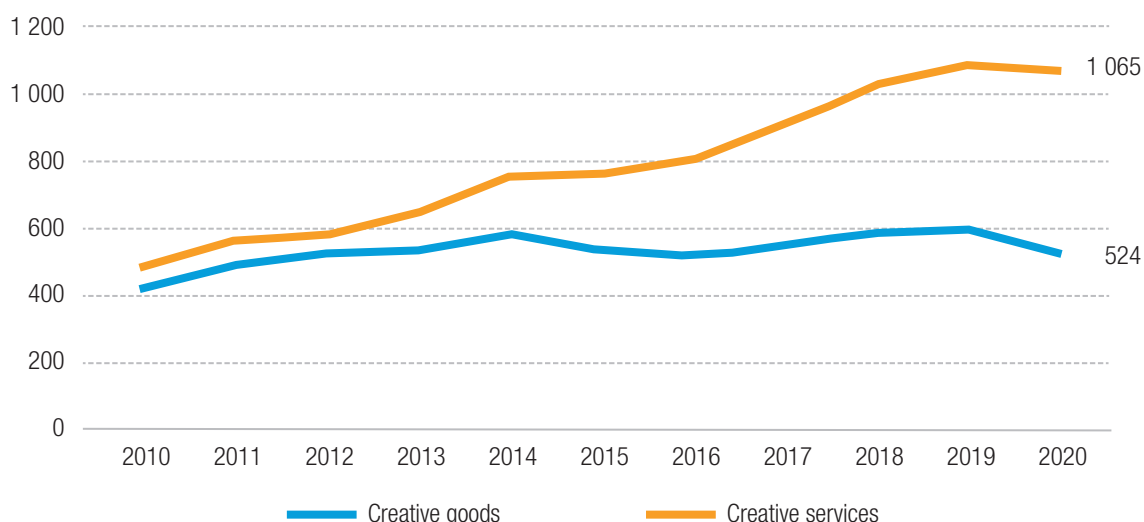
Several respondent countries have identified specific sectors as a priority for international trade. The most often highlighted industries included music (mentioned by 15 of the 33 respondent countries), audio-visual arts and industry, fashion, videogames, design, performing arts, animation and film industry.

Trade in creative goods and services generates increasing revenues for countries, with services having a dominant role

Trade in creative goods¹⁰ and services¹¹ generate increasing revenues for countries, but creative services exports vastly exceed those of creative goods (figure a). The global exports of creative goods increased from US\$ 419 million in 2010 to US\$ 524 million in 2020, while world exports of creative services increased from US\$ 487 billion to almost US\$ 1.1 trillion during the same period. Creative goods and services exports decoupled in the past few years, driven by a robust increase in the exports of software and research and development services and a so-called “dematerialization” of certain creative goods (due to

digitization, some goods are increasingly becoming creative services). Another factor is that the statistical capturing of detailed services sub-categories has significantly improved in recent years.

Figure a
Global exports of creative goods and services, 2010–2020
 (US\$ billion)

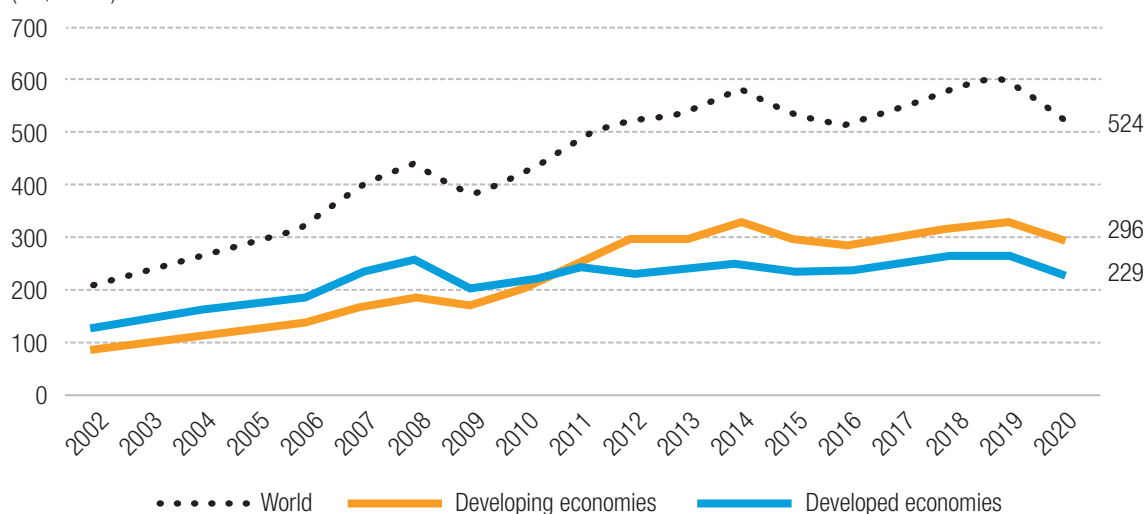


Source: UNCTAD.

Trade in creative goods

Since 2011, developing economies have exported more creative goods than developed economies (see figure b). Furthermore, a small group of economies accounts for more than two-thirds of global creative goods exports. In 2020, China was by far the largest exporter of creative goods (US\$ 169 billion), followed by the United States of America (32), Italy (27), Germany (26), and Hong Kong (China) (24).

Figure b
Exports of all creative goods by developing and developed economies, 2002–2020
 (US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

South-South trade in creative goods has almost doubled in the past two decades. On the other hand, developed economies mainly tend to exchange cultural goods among themselves. In 2020, South-South trade in creative goods represented 40.5 per cent of creative exports by developing economies.¹² It primarily involves exports of jewellery, interior design products, recorded media, fashion, and toys. South-South trade can be important for developing economies to create new trading opportunities and diversify exports.

Globally, the share of all creative goods from total exports slightly declined between 2002 and 2020, decreasing from 3.2 per cent in 2002 to 3 per cent in 2020.¹³ Due to technological development, the composition of creative goods exports changed significantly over the past two decades. The exports of CDs, DVDs, tapes, newspapers, and other printed materials decreased, while the exports of recorded media and video games surged.

Design products dominate trade in creative goods. In 2020, design goods accounted for 62.9 per cent of total creative goods exports, followed by new media products (13.4), art crafts (8), visual arts (6.2), publishing (5.4), audio-visuals (3.1), and performing arts (1). Among design goods, the main exported products are interior design products (20.1 per cent of total creative exports), fashion (15.9), jewellery (15.3), and toys (11.4).¹⁴

Creative goods exports were hit hard by the COVID-19 pandemic and lockdowns worldwide: creative goods exports were down by 12.5 per cent in 2020, while exports of all goods fell by only 7.2 per cent. This can be due to the lack of physical exchanges on the global art market, an important distribution channel for visual arts, and increasing digitization in the audio-visual and publishing sector.¹⁵ Preliminary data show that exports of creative goods began to recover in 2021.

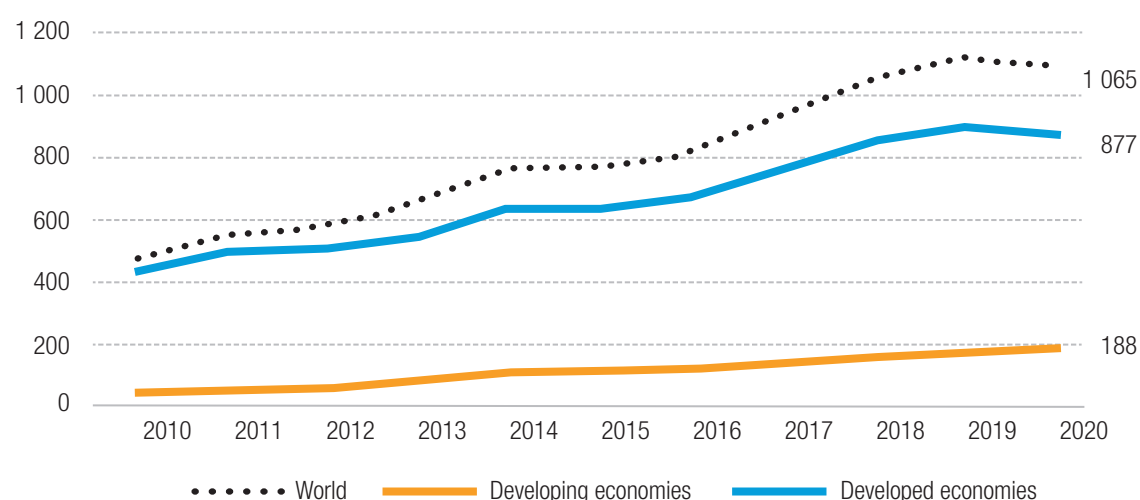
Trade in creative services

Developed countries have been exporting significantly more creative services than developing economies (see figure c), accounting for 82.3 per cent of all creative services exports in 2020. The gap between developed and developing countries has slowly decreased over the past decade. In 2020, the United States of America, and Ireland were the largest exporters of creative services with US\$ 206 billion and US\$ 174 billion, respectively. In Ireland, multinational companies strongly contribute to creative services exports, especially in computer services. The next largest creative services exporters are Germany (US\$ 75 billion), China (59), and the United Kingdom (57).

Figure c

Exports of all creative services by developing and developed economies, 2010–2020

(US\$ billion)



Source: UNCTAD.

The relative importance of creative services exports is on the rise. The share of all creative services from total services exports increased from 12.3 per cent in 2010 to 17.4 per cent in 2019. Furthermore, due to a dramatic fall in global trade in travel services, the share of creative services further increased to 21.4 per cent in 2020.¹⁶ This may last if changed consumer behaviour and business operating habits caused by the COVID-19 pandemic stay permanent.

Software services (accounting for 39.3 per cent of total creative services exports in 2020) and research and development (33.2) are the most exported creative services. They are followed by advertising, market research, and architecture (14.8), audio-visual (8.6), information (3.5), and cultural, recreational, and heritage services (0.5). Developed countries dominate exports in all services categories and export different services categories compared to developing economies. For example, developed countries account for over 90 per cent of global exports of research and development and audio-visual services, involving significant export revenues from sales and licenses.¹⁷

Creative services were more resilient during the COVID-19 pandemic than other services sectors. Exports of creative services were down by only 1.8 per cent in 2020, while exports of all services fell by 20 per cent (mainly driven by travel and transport services, which contracted by 62.5 and 20.3 per cent in 2020, respectively). All creative services categories experienced some losses in exports in 2020 during the COVID-19 pandemic, except software services (which registered an annual growth of 5.6 per cent).¹⁸

Developing countries face several barriers to participating in services trade, including creative services. Firstly, the lack of fundamental skills and infrastructure can hinder developing economies from becoming competitive players in creative services. The world's most significant exporters of creative services, both developed and developing economies, score high in indicators that measure human capital, physical, and digital infrastructure. Secondly, developing countries face services trade restrictions, and access to the most important creative services markets remains governed by commitments in the World Trade Organization's (WTO) General Agreement on Trade in Services (GATS). However, WTO members have so far made limited use of the GATS to encourage the removal of trade restrictions or to guarantee existing levels of access. Multilateral services commitments —including creative services— are, overall, modest.

The lack of harmonised definitions and methodologies and lack of data remains a challenge for measuring the creative economy

Several frameworks exist to measure the creative economy with patterns of common industries and products covered (*i.e.*, arts, audio-visuals, publishing, music, performing arts, photography), but also differences due to national or regional classifications; activity or product coverage; methodology and guidelines; and types of activities and products covered (*i.e.*, cultural and related, creative, auxiliary, interdependent). The most frequently used guidelines are the 2009 *UNESCO Framework for Cultural Statistics*, WIPO's 2015 *Guide on Surveying the Economic Contribution of the Copyright-Based Industries*, guidelines for cultural satellite accounts by the Andrés Bello Organization Agreement (widely used among Latin American countries), and the Guide to Eurostat culture statistics (used in the European Union). Considering UNCTAD's mandate as the focal point of the United Nations system for the integrated treatment of trade and development, in terms of measurement, UNCTAD focuses on international trade and compiles data on international trade in creative goods and services.

Developing countries measure the economic contribution of their creative sector in diverse ways. For example:

- The creative economy is an increasingly important sector for **Indonesia**. Based on the 2009 Indonesian Business Classification (KBLI) and the International Standard Industrial Classification of All Economic Activities (ISIC), the country identified sixteen creative industries: architecture; interior design; visual communication design; product design; film, animation, and video; photography; crafts; gastronomy; music; fashion; gaming; publishing; advertising; television and radio; performing arts; and fine arts. In addition, using Harmonized System 2012 codes, seven main product groups were identified as

relevant to capture international trade in creative goods, including film, animation, and video; crafts; gastronomy; music; fashion; publishing; and arts.¹⁹

- Like several Latin American economies, **Mexico** produces culture satellite accounts to estimate the economic dimensions of its creative sector. The methodology is based on international statistical standards such as the 2008 System of National Accounts, UNESCO Framework for Cultural Statistics, and the Culture Satellite Account Compilation Guide of the Andrés Bello Organization Agreement. The culture satellite accounts include statistical tables on production, income generation, jobs, and people employed by gender and non-monetary indicators. Cultural productive activities are defined using Mexico's System of National Accounts (SNA) and the North American Industry Classification System (NAICS). The ten main activities include performing arts and shows; visual and plastic arts; crafts; design and creative services; books, impressions, and press; audio-visual media; music and concerts; material and natural heritage; education and cultural diffusion in educational institutions; and cultural production of households.²⁰
- In 2022, **South Africa** carried out its third mapping exercise to capture its creative economy's economic and social dimensions. South Africa's approach is based on UNESCO concepts and methodologies to identify cultural industries and the UNCTAD list of products to measure international trade, adapted to the country's statistical system and available data. With the help of new data about the creative economy, South Africa could track the impact of COVID-19 on the sector and international trade in creative goods and services.²¹

The lack of harmonized definitions and comparable statistics makes estimating the full weight of the creative economy difficult. The General Assembly resolution 74/198 stresses the importance of regular, reliable, and comparable data on the contribution of the creative economy to the achievement of the SDGs. However, difficulties in measuring the domestic production and international trade in creative products and services remain challenging for most developing countries.

The traditional separation between goods and services may be inadequate when measuring trade in creative products. Creativity is an intangible which may be embodied into a good or service. This good or service can be consumed locally or exported. Therefore, the measurement challenge is to estimate the domestic and imported creative content of all domestically produced and exported products, rather than classifying the whole item as "creative" or "non-creative." The current UNCTAD definition may not capture fully trade in goods with actual creative content and lead to an over-estimation of trade. Design goods, such as interior, fashion, jewellery, and toys, dominate trade in creative goods based on the current UNCTAD product composition.

Better and more disaggregated data is required to gain more insights into the role of services in economic transformation and their potential for developing economies for services-led diversification. Services trade, including creative services, is becoming too important not to be measured. Services can be means for structural transformation and competitive advantage. Countries need to measure services to monitor and manage servicification, the increasing reliance of non-services sectors such as manufacturing on services.

Lack of data is a critical problem, especially in developing economies. Developing countries face several challenges in quantifying services. They often lack the appropriate statistical infrastructure, including business registers to compile data. They do not have the institutional arrangements to let data compilers access multiple potential data sources and lack financial resources, IT infrastructure, and trained experts. Even if data exists, processing, formatting, and publishing them may be challenging. There is a need for more funding and capacity building to strengthen countries' statistical capabilities.²²

Moving forward, UNCTAD is currently in two groups to facilitate further discussions on defining and measuring the creative economy. UNESCO and UNCTAD are co-leading a sub-group for the clarification on cultural products resulting from creative industries as part of the Task Team on International Trade

Statistics, facilitated by the United Nations Statistics Division. The group will prepare a guidance note to be incorporated into the updated International Merchandise Trade Statistics Manual. UNCTAD also created an Informal Working Group on Creative Economy, bringing together experts from developed and developing countries to discuss evolving issues around the creative economy. The working group aims to review and potentially create a new working definition of the creative economy and creative industries for UNCTAD. Regarding capacity building for better services trade statistics, the recent ninth session of UNCTAD's Multi-Year Expert Meeting (MYEM) on Trade, Services and Development²³ in July 2022 proposed to create an informal working group of services data experts to discuss data needs, identify gaps and potential funding opportunities in support of developing countries.

New and emerging technologies are fundamentally changing some creative industries. Developing countries must catch up by providing adequate digital infrastructure and a regulatory environment

The use of industry 4.0 technologies opens new opportunities for the creative economy. Three-dimensional (3D) printing, artificial intelligence, augmented reality and virtual reality (AR/VR), blockchain, cloud computing, drones, and the Internet of Things (IoT) are driving the fourth industrial revolution. They have created new avenues for producing, distributing, and consuming creative goods and services (*i.e.*, e-commerce and streaming) while reaching a more comprehensive range of consumers globally.²⁴ For example, online platforms use artificial intelligence to personalize music and film preferences. Additive manufacturing, or 3D printing, can be used to produce crafts. Augmented reality allows for fashion shows to feature invisible models. Blockchain technology (*i.e.*, non-fungible tokens) can help certify the originality and ownership of unique artworks. Drone technology significantly impacts media production, including advertising, broadcast and photojournalism, television, and filmmaking. Virtual reality can promote an immersive experience in computer games and performing arts.

The COVID-19 pandemic accelerated the shift towards e-commerce and digital platforms and the scope for the transformation of the creative economy. It is still to be seen if the new consumer behaviours and business operating habits become permanent. However, the International Data Corporation (IDC) estimates that, due to the COVID-19 pandemic, 65 per cent of the world's GDP will be digitized by 2022.²⁵

Nevertheless, global digital divides persist with repercussions on the creative economy. For example, the International Telecommunication Union estimates that as of the end of 2021, over a third of the world's population, 2.9 billion people, do not use the Internet.²⁶ The majority of them are women and girls.²⁷ Many of them live in the least developed countries (LDCs), landlocked developing countries (LLDCs), and small island developing States (SIDS). In addition, only 39 per cent of rural households have access to the Internet. This gap mainly affects the creative economy's ability to be genuinely inclusive, especially for developing countries, least developed countries, and small island developing States that still need to benefit from the digital dimension of the creative economy.

In addition, producers of creative products, especially small- and medium-sized enterprises (SMEs), face several hurdles in accessing global markets. This includes limited access to online payment solutions, high logistics costs, lack of reliable information technology companies to whom SMEs could outsource the website development, limited availability of regional and international marketplaces, poor connectivity in rural areas, and lack of skills related to market research, digital marketing and branding, website and marketplace design, logistics, payments, and customer service.

The scope and application of IPRs in the digital environment are unclear.²⁸ IPRs protect creativity in original works. But the IPR system was designed for an analog environment. Digital reproductions, multiple sharing, and new business models like streaming represent a value in the digital domain but a challenge for copyright experts and policy makers.

The following policy areas could contribute to developing creative economies through new and emerging technologies:

- Human skills are crucial in pursuing the digital transformation of the creative economy. Developing human capacities requires investment in the education system, including schools, universities, colleges, and training providers. Digital competencies are essential, but generic and complementary skills, such as literacy and numerical skills, skills in design, marketing, and entrepreneurship, are also needed for most professions in digitalized creative industries. A specific characteristic of the creative sector is that some artists and craftspeople may have negative attitudes towards business, marketing concepts, or new technologies. Policies can create places such as fabrication laboratories (or fab labs) for artists and designers to test and experiment with new technologies.²⁹ With the rise of e-commerce, skills to participate in digital trade are essential for creative professionals and micro-, small and medium-sized enterprises (MSMEs). Education policies must be accessible and inclusive to all,³⁰ including women, people with disabilities, and different age groups. Life-long learning is becoming an essential tool.
- Overcoming infrastructure barriers to digitalization is crucial. This is particularly important because digital technologies are paramount in accessing markets. Universal and affordable access to the Internet is the first step, even if providing connectivity to crafts sectors in rural areas is a challenge. However, connectivity alone is not sufficient. Other infrastructures such as access to financial services, postal services, and transport networks are also required.³¹ Potential synergies exist as digitalization facilitates access to several other services, such as digital financial services.³²
- Creating an enabling environment for creative industries may involve several policy areas, including incentives. It may include giving the private sector fiscal incentives and creating funding programmes to support research and development in creative industries. Some high-risk segment content sectors may need government support to have better access to capital. Other creative activities may be considered commercially non-viable public goods that need non-commercial public support to exist. It is vital to strike the right balance between intellectual property protection on the one hand and prevention of abuse of IPR on the other. Appropriate competition and intellectual property policy are key to preventing abuse of IPR and maintaining open and competitive markets in the creative economy, which could facilitate and not deter entry by new firms.

Putting creative economy front and centre: celebrating the 2021 International Year of the Creative Economy

In December 2019, the United Nations General Assembly adopted resolution 74/198 on the International Year of Creative Economy for Sustainable Development, 2021. The resolution “requests the secretariat of the United Nations Conference on Trade and Development and in consultation with UNESCO and relevant entities of the United Nations system, to inform the General Assembly at its seventy-seventh session of the implementation of the present resolution, through a dedicated section of the Creative Economy Outlook, elaborating in particular on how the resolution is aligned with and advances the 2030 Agenda.”

UNCTAD and partners organised 44 events during the International Year of Creative Economy for Sustainable Development 2021. These activities allowed UNCTAD to implement the resolution by raising awareness about the creative economy, promoting cooperation and networking, encouraging the sharing of best practices, and promoting an enabling environment for all stakeholders in the creative economy.

One of UNCTAD’s key events was the Creative Economy and Digitalization Forum, jointly organised with the Government of Barbados. The Bridgetown Accord³³ adopted by the forum, highlights “the inequality at the root of the cultural, creative and technological systems of the world and the need to identify more inclusive ways of industrializing creativity, technology and innovation for a more equitable future.”

UNCTAD was informed about 82 events held by civil society during the International Year of Creative Economy in 2021.³⁴ The focus of the all-year campaign went beyond the traditional cultural economy to

include sciences and industrial production. This new focus allows policymakers to expand their range and style of creative economy-related policies. These policies require more horizontal types of inter-ministerial government interventions in education and the promotion of public-private research and development partnerships. In addition, it involves specific support measures that governments may provide to various forms of artistic or cultural expression.

UNESCO's actions for the celebration of the 2021 International Year of Creative Economy for Sustainable Development involved a multitude of events, such as the Abu Dhabi Summit 2021,³⁵ ResiliArt Movement³⁶ in 2020, and a variety of projects globally via the International Fund for Cultural Diversity.³⁷ These activities encouraged decision-makers to reflect on concrete actions post-2021, explored ideas and challenges of developing a resilient and collaborative creative ecosystem, and raised awareness of the ramification of COVID-19 across the creative sector. It also led to a global discussion with key industry professionals on the experience of artists in the field and collaboration with national governments.

The United Nations Industrial Development Organization (UNIDO) partook in 4 major events for the creative economy in 2021 and facilitated a broad scope of technical assistant projects. One of UNIDO's side events for the 19th Session of the UNIDO General Conference³⁸ allowed international experts from Armenia, Lebanon, Tajikistan, and Tunisia, to name a few, to discuss how artisanal expertise and cultural heritage can become drivers of social change. Through new employment and entrepreneurial opportunities, cultural and creative activities can improve livelihoods for vulnerable social groups and rural communities.

UNIDO's partnerships with other international organizations looked at digital innovation. Together with UNCTAD and Sound Diplomacy, UNIDO held a dialogue called *Create, innovate, recover: digitalizing creative industries for a sustainable recovery in Africa*³⁹ to explore the importance of innovation and digital transformation in the creative sector. UNIDO also partnered with the European Brand Institute (EBI) for the 17th Brand Global Summit⁴⁰ highlighting brands' role as significant game-changers in boosting post-pandemic economic recovery while also unleashing creativity and innovation in the era of digitalization.

WIPO organised 12 major events to promote the creative economy in 2021. The activities helped WIPO to form partnerships, collaborate with the private and public sectors, and facilitate capacity building activities, which aimed at raising awareness on copyright and intellectual property among creative communities, government policy makers, the business community, and civil society. It launched WIPO for Creators⁴¹ to raise awareness about creators' rights and related processes. WIPO also organized bi-weekly webinars on copyright infrastructure and works with member States and creative industry stakeholders on strengthening legal and licensing frameworks in support of effective and efficient copyright and related rights management.

WIPO also organised capacity building activities at the national, regional, and international levels. For example, it facilitated various meetings on creative industries with members States of the African Regional Intellectual Property Organization (ARIPO), Antigua and Barbuda, Kazakhstan, Kyrgyzstan, Poland, the Philippines, and Trinidad and Tobago. The meetings focused on conceptual issues, the role of intellectual property, capacity building for trainers on intellectual property, data collection and analysis, and specific creative sectors, such as the audio-visual sector, book publishing, mobile applications, music, and video games.

Many governments have seen the positive contribution of the creative economy and have invested in multiple programmes and activities throughout the International Year of Creative Economy. Slovenia highlighted the importance of culture and creativity in political dialogues, concrete cultural projects and communication campaigns. Slovenia's "Creativity4Sustainability" video campaign⁴² raised public awareness on the cross-cutting contribution of culture and creativity to SDGs. Indonesia consistently attaches importance on developing and promoting an inclusive creative economy. Throughout 2021, it carried out various activities at national, bilateral, regional, and multilateral levels, through collaboration with various stakeholders.

Efforts to promote dialogue and inclusion within the creative industries have also started in the least developed countries. For example, the second edition of The Biennale of Luanda – “Pan-African Forum for the Culture of Peace,”⁴³ a joint initiative of UNESCO, the African Union and the Government of Angola in partnership with UNCTAD, was held in December 2021. The initiative aims to promote the prevention of violence and the resolution of conflicts, by encouraging cultural exchanges in Africa and dialogue between generations.

Main findings and recommendations

The concept and definition of the creative economy are diverse, representing countries’ cultural diversity, but also due to different economic structures, statistical methodologies, and classifications used. Each concept has a particular rationale, depending on underlying assumptions about creative industries’ purpose and mode of operation. They often lead to a different basis for categorization into “core” and “peripheral” industries within the creative economy. While no one definition fits all countries’ needs, existing frameworks and classifications can help countries conceptualise their creative economy and industries in a more harmonised way. Considerations for countries who wish to conceptualise or re-define their creative economy and creative industries:

- Recognise the importance of the creative economy by building on definitions and classifications of international and regional organisations and conceptualising creative industries in ways that consider national and regional economic structures; and
- Governments are encouraged to work with international organisations like IDB, UNCTAD, UNESCO, and WIPO towards a more harmonised concept and scope for the creative economy and industries.

It is essential to map and measure the creative economy and industries, including their contribution to international trade. Measuring the creative economy can provide evidence and insights for policy makers to design, plan and implement policies targeting the creative industries and inform investors. Other benefits may include maximising job creation opportunities, identifying the critical clusters that can lead to economic growth and increased export revenues, identifying the spatial characteristics of the creative industries, and fostering cultural and creative tourism. Considerations for countries who wish to start work on mapping and measuring their creative economies or improve their process:

- Mapping processes should include setting clear objectives, bringing together relevant stakeholders, conceptualising and defining the scope of creative industries, identifying parameters to measure and available data sources, collecting and analysing data; and
- Use already available definitions, classifications, methodologies, and guidelines by international and regional organisations like UNCTAD, UNESCO, and WIPO.

More and better data is needed to measure creative industries’ economic contribution and international trade flows in creative goods and services. Some countries have made significant progress in measuring the economic contribution of the creative economy, especially to GDP, employment, and international trade. Others cooperated with international organizations like UNESCO and WIPO to prepare joint reports. But lack of data may lead to some creative industries and activities being overlooked by analysis, policy design, and development. There is a significant creative trade data gap between developed and developing countries. Trade classification systems based on the product’s physical characteristics are not always helpful in capturing cultural and creative value. The issue with services trade data is its complexity and lack of statistical capacities in developing countries and LDCs. Recommendations to improve data and statistics on the creative economy and creative industries:

- Involve authorities and institutions working in the cultural and creative sector, national statistical offices, and central banks to identify already existing data sources and compile data for measuring the contribution of the creative economy to GDP, employment, trade, and well-being;

- Mobilize funding and dedicate financial and human resources to regularly collect, produce and disseminate official data on the creative economy;
- Build statistical capacities to measure international trade flows in creative goods and services. In general, measuring servicification and international trade in creative services is increasingly important to monitor and measure structural transformation;
- For inclusive policies targeting creative industries, collecting and analysing data on women, youth, informal workers, and other marginalised groups working in the creative sector is essential to inform policy making. There is a need for more disaggregated data. For inclusive data collection, it is also necessary for national statistical offices to provide guarantees of the independence and confidentiality of statistical reporting; and
- International organisations can contribute with knowledge sharing, developing statistical guidelines, carrying out joint studies to measure countries' creative sectors, providing capacity-building activities in developing countries, and mobilising resources.

Creative services represent an increasing share of global services exports and generate substantial export revenues. However, developed economies largely dominate creative services exports. Services, creative and non-creative, are potent enablers for economic diversification. They have the potential to generate more significant income, productivity, employment, investment, and trade. The increased reliance of national economies and international trade on services as inputs, also known as servicification, represents opportunities for developing countries to join global value chains and generate export revenues. Creative services are becoming increasingly important because, with technological innovation, there is an accelerating shift from producing creative goods to delivering creative services. However, new UNCTAD data show that developing countries are vastly under-represented in the exports of creative services, especially in the export of those related to research and development. Policies to boost creative services in developing countries:

- Create and modernize the legal framework related to the creative economy, for example, by creating creative economy laws and updating intellectual property laws;
- Strengthen institutional capacities of government agencies in charge of promoting the creative economy;
- Identify and address challenges that hinder entrepreneurs and MSMEs from participating in digitally deliverable services, an increasingly important type of delivery since the COVID-19 pandemic. The most significant challenges that policy makers could address include poor connectivity in rural areas, lack of appropriate digital skills and competencies, limited access to online payment solutions, and high logistics costs;
- Provide a copyright regime that balances the protection of copyrights and the right of access to culture and creative products and services, where the enforcement, collection, and distribution of royalties can take place systematically; and
- Improve developing country service providers' access to creative services markets in developed and developing countries, for example, by opening services markets to foreign providers.



Introduction

The 2021 International Year of Creative Economy put creative economy front and centre at a time when creative solutions are needed to overcome global challenges. Culture and creativity contribute significantly and increasingly to the global economy and international trade. The creative economy can foster income generation, export earnings and job creation while promoting social inclusion, cultural diversity and human development. Creative industries embrace economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives. It is a feasible development option calling for innovative multidisciplinary policy responses and inter-ministerial action (UNCTAD, 2008). The concept of the creative economy is closely linked with the “knowledge economy”, a key driver of endogenous growth through investment in human capital.

The contribution of the creative economy to sustainable development was highlighted in the United Nations General Assembly resolution 74/198, which recognised that it aligns with the three dimensions of sustainable development – economic, social, and environmental. The creative economy is contributing to the Sustainable Development Goals (SDGs) in multiply ways, especially to Goals 1 (no poverty), 5 (gender equality), 8 (decent work and economic growth), 9 (industry, innovation, and infrastructure), 10 (reduced inequalities), 11 (sustainable cities), 12 (sustainable consumption and production patterns), 16 (peaceful and inclusive societies) and 17 (means of implementation and global partnerships).

Chapter I of this report looks at different definitions for the creative economy and presents latest global trends, including results of a survey conducted by UNCTAD among 33 countries on institutional arrangements for the creative economy, national strategies and policies, and measurement of creative industries. The chapter also provides the latest trends in the international trade of creative goods and services.

Chapter II presents different frameworks, approaches, and methodologies to measure creative industries in national economies. The chapter shows case studies about how some developing economies measure their creative industries, provides guidance on how others can follow, and discusses data challenges.

Chapter III discusses how new and emerging technologies, especially increasing digitalisation in every aspect of life since the COVID-19 pandemic, contribute to fundamentally changing creative industries. The case studies in the chapter also highlight how new technologies are enabling different technical cooperation projects by United Nations agencies on creative industries.

Chapter IV responds to General Assembly resolution 74/198 by reporting on the implementation of the International Year of Creative Economy and how it advances the 2030 Agenda. The chapter builds on valuable contributions of countries and organizations across the United Nations, including the Food and Agriculture Organization (FAO), International Labour Organization (ILO), International Trade Centre (ITC), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Industrial Development Organization (UNIDO), World Intellectual Property Organization (WIPO), and World Trade Organization (WTO).

Chapter V summarises the main findings and provides recommendations to help countries and the United Nations system to accelerate their efforts in the implementation of the 2030 Agenda through the creative economy, in line with General Assembly resolution 74/198.





Chapter I

Global picture trends

Cultural and creative industries make a significant contribution to the world economy. The cultural sector accounts for 3.1 per cent of global gross domestic product (GDP) (UNESCO, 2022), while this report estimates that in 2020, creative goods and services represented 3 and 21 per cent of total merchandise and services exports, respectively. In addition, cultural and creative industries provide 6.2 per cent of all employment generating nearly 50 million jobs worldwide, although many of these are short-term and low-paid. They employ more young people (age group of 15–29-year-olds) than any other sectors (UNESCO, 2022). Employment in these industries favours women and youth. These factors place creative industries as crucial sectors for the achievement of the 2030 agenda.

However, the COVID-19 pandemic had a devastating impact on certain creative industries and deepened their pre-existing vulnerabilities. In fact, reports indicate that during this period as much as 10 million jobs disappeared from the cultural and creative sectors, which contracted by US\$ 750 billion globally in 2020 (UNESCO, 2022). A comparative study about the impact of COVID-19 on the creative sector in Africa showed that the most vulnerable sectors were performing arts, visual arts, and the heritage sector (Bunketi Buse, 2020). These sectors have high levels of informality, a high proportion of freelancers, and extensive use of short-term contracts. In addition, companies tend to be micro and small size, and face-to-face interactions, like attending performing arts events, are essential to their business models. UNCTAD estimates that, in 2020, exports of creative goods shrank by 12.5 per cent year on year globally, almost twice as much as exports of all commodities, while exports of creative services fell by 1.8 per cent year on year.

The chapter explores the evolving concepts and definitions for the creative economy. Based on a 2021 UNCTAD survey, the chapter then provides a global picture of how countries manage and monitor their creative economies through different national institutions; strategies and policies; studies; and priority creative industries for international trade. Finally, the chapter looks at the latest trends in the international trade of creative goods and services.

A. Defining the creative economy and creative industries

The notion of “creativity” is evolving. The definition of creativity builds on the interplay between human creativity, ideas, intellectual property, knowledge, and technology. Definitions vary vastly between countries as there is no simple definition of “creativity” that encompasses all the various dimensions of this phenomenon.

Definitions cannot be considered set in stone. Today, creative activities have moved from including mainly traditional arts and crafts to encompassing designing smartphone applications. This creates thousands of jobs for designers and programmers worldwide in both developed and developing countries. More traditional activities like fashion are also impacted by new technologies. Designers have moved from paintbrushes to pixels. Even the heritage activities preserving old traditional techniques can –if properly organised – benefit from advances in technologies for various aspects of the product cycle, from training and knowledge sharing to procurement and commercialization.

In general, creativity can be broken down into the following (UNCTAD, 2008):

- artistic creativity which involves imagination and a capacity to generate original ideas and novel ways of interpreting the world, expressed in text, sound and image;
- scientific creativity which involves curiosity and a willingness to experiment and make new connections in problem solving; and

- economic creativity which is a dynamic process leading towards innovation in technology, business practices, marketing, etc., and is closely associated with the concept of “knowledge economy”, a key driver of endogenous growth through investment in human capital.

Regardless of the way in which creativity is interpreted, there is no doubt that, by definition, it is a key element in defining the scope of the creative industries and the creative economy. Before we further examine the creative economy, it is important to understand the difference between *creative industries* and *creative economy*.

The term “creative industries” has been in use since the 1990s, when the United Kingdom government attempted to define and analyse the direct impact of creative industries on the British economy (Newbigin, 2014). Looking closely at the creative industries, it can include a multitude of industries: advertising, architecture, arts and crafts, design, fashion, film, video, photography, music, performing arts, publishing, electronic publishing, research and development, software, computer games, and television and radio, which are the lifeblood of the creative economy. These industries create employment and promote innovation. On the other hand, they produce a series of non-economic benefits by maintaining and promoting cultural and artistic values that contribute to societies’ well-being.

The concept of “creative economy” was later developed in 2001 by John Howkins (Howkins, 2001). Creativity, according to Howkins, is about using an idea to generate another idea, an endless cognitive and emotional process of creation, exploration, and innovation. The creative economy comprises all the interconnected creative industries. Governments around the world started to recognise creative industries, with their emphasis on innovation, as much more inclusive concept of a wider creative economy (British Council, 2010).

Other researchers, governments, and organisations carried out further work to understand the complexities of this topic. The list below highlights various concepts of the creative industry in the chronological order of their publication:

- Richard E. Caves examines the economics of art, focusing specifically on how art comes to the market and how artists get remunerated for their work. He identifies the principal characteristics of creative activities, such as the uncertainty of demand, the “art for art’s sake” attitude of artists, or the infinite variety of products (Caves, 2000);
- David Throsby proposes the so-called concentric circles model. (Throsby, 2000). He suggests that the cultural value of cultural goods and services distinguishes these industries and places them closer to the centre of the cultural concentric circles. Creative ideas and influences diffuse outwards in the model through different layers or concentric circles. The cultural and commercial content ratio decreases as one moves outwards from the centre;
- The Department of Culture, Media, and Sports of the United Kingdom (DCMS) defines creative industries as “those industries which have their origin in individual creativity, skill, and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS, 2001). In 2013, DCMS adopted a model with a new approach based on the creative intensities of occupations developed by Nesta (Bakhshi *et al.*, 2013);
- WIPO focuses on the importance of copyright and categorizes industries according to the extent to which their activities are dependent on copyright. The first category, core copyright industries, are wholly engaged in the creation, production, performance, exhibition, communication or distribution, and sales of copyright-protected materials. The three other industry categories are inter-dependent copyright industries, partial copyright industries, and non-dedicated support industries. WIPO published the first edition of its guidebook in 2003 and later revised it in 2015 (WIPO, 2015);
- UNESCO focuses on the culture, defined as “the set of distinctive spiritual, material, intellectual and emotional features of society or a social group, that encompasses not only art and literature but lifestyles, ways of living together, value systems, traditions, and beliefs.” UNESCO’s six cultural domains

represent a set of economic and social activities that are regarded as cultural. Two related domains also include partially cultural and recreational or leisure activities (UNESCO, 2009);

- Canada first released its culture satellite account in 2011 and updates it regularly. The culture satellite account is sponsored by the federal Department of Canadian Heritage and its various partners and is developed and maintained by Statistics Canada. Culture is defined as “creative artistic activity and the goods and services produced by it, and the preservation of heritage” (Statistics Canada, 2011); and
- The Inter-American Development Bank (IDB) refers to the creative economy as “orange economy”. It is “the group of activities through which ideas are transformed into cultural and creative goods and services whose value is or could be protected by intellectual property rights (IPRs).” The creative economy includes activities related to three main concepts: (i) traditional and artistic activities, (ii) the creative industry, and (iii) activities that provide creative support to traditional industries (IADB, 2017).

Taking into account the above and the UNCTAD mandate as of the focal point of the United Nations system for the integrated treatment of trade and development, UNCTAD’s definition of creative industries and the creative economy can be summarized as follows (UNCTAD, 2008 and 2010).

Creative industries:

- are the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs;
- constitute a set of knowledge-based activities, focused on but not limited to culture and heritage, potentially generating revenues from trade and intellectual property rights;
- comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives; and
- stand at the crossroads of the artisan, services and industrial sectors;
- are at the heart of the creative economy.

The creative economy:

- is an evolving concept based on creative assets potentially generating economic growth and development;
- fosters income generation, job creation and export earnings while promoting social inclusion, cultural diversity and human development;
- embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives;
- is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy;
- is a feasible development option calling for innovative, multidisciplinary policy responses and inter-ministerial action.

The concept of the creative economy is evolving and all industries involve some level of creativity and innovation. Table 1 compares the coverage of the different approaches and definitions. Each model has a particular rationale, depending on underlying assumptions about the creative industries’ purpose and mode of operation. Each one leads to a somewhat different basis for classification into “core” and “peripheral” industries within the creative economy.

Table 1

Examples of industries covered in different cultural and creative economy concepts

<p>Canadian culture satellite account</p>	<p>Culture sub-domains: archives, libraries, cultural heritage; natural heritage; performing arts; festivals and celebrations; original visual art; art reproductions; photography; crafts; advertising; architecture; design; books; periodicals; newspapers; other published works; film and video; collected information; broadcasting; interactive media; sound recording; music publishing</p> <p>Transversal domains: education and training; governance, funding and professional support</p>
<p>Concentric circles model</p>	<p>Core creative arts: literature; music; performing arts; visual arts</p> <p>Other core creative industries: film; museums; galleries; libraries; photography</p> <p>Wider cultural industries: heritage services; publishing and print media; television and radio; sound recording; video and computer games</p> <p>Related industries: advertising; architecture; design; fashion</p>
<p>DCMS creative industries</p>	<p>Creative industries: advertising and marketing; architecture; crafts; design and designer fashion; film, TV, video, radio and photography; IT software and computer services; publishing; museums, galleries and libraries; music performing and visual arts</p>
<p>IDB orange economy</p>	<p>Traditional and artistic activities: visual arts; performing arts</p> <p>Creative industry: crafts; publishing; audio-visual; phonographic; interior design; graphic arts; illustration; jewellery; video games; advertising; fashion</p> <p>Activities of creative support: product design; packaging design; marketing</p>
<p>UNCTAD creative economy</p>	<p>Creative goods: art crafts; audio-visuals; design; new media; performing arts; publishing; visual arts</p> <p>Creative services: research and development licenses and services; software licenses and services; audio-visual licenses and services; information services; advertising, market research and architecture; cultural, recreational and heritages services</p>
<p>UNESCO cultural economy</p>	<p>Main cultural domains: cultural and natural heritage; performance and celebration; visual arts and crafts; books and press; audio-visual and interactive media; design and creative services</p> <p>Related domains: tourism; sports and recreation</p>
<p>WIPO copyright industries</p>	<p>Core copyright industries: press and literature; music; theatrical productions, operas; motion picture and video; radio and television; photography; software, databases and computer games; visual and graphic arts; advertising services; and copyright collective management societies</p> <p>Interdependent copyright industries: manufacture, wholesale, and retail of: TV sets, radios, CD-DVD-Blu-Ray players, electronic game equipment, and other similar equipment; computers and equipment; tablets and smartphones; and musical instruments</p> <p>Partial copyright industries: apparel, textiles, footwear; jewelry and coins; other crafts; furniture; household goods, china, and glass; wall coverings and carpets; toys and games; architecture, engineering, surveying; interior design; and museums</p>

Source: UNCTAD based on DCMS (2016), IDB (2017), Statistics Canada (2011), Throsby (2008), UNESCO (2009), and WIPO (2015).

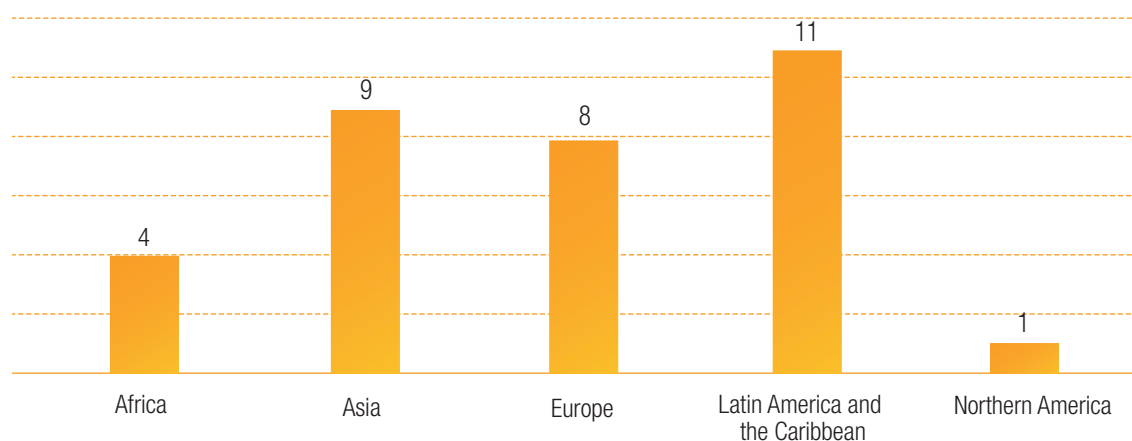
B. Results of the 2021 UNCTAD survey on the creative economy

In 2021, in the context of the implementation of General Assembly resolution 74/198 on the International Year of Creative Economy, UNCTAD conducted an online survey on the creative economy and creative industries. The responses from 33 countries⁴⁴ provide insights on how the creative economy has become a sector of growing social, political and economic significance at the national level. The responses include information about national agencies overseeing creative industries, related policies and useful references to studies about the economic contribution of the creative economy. As figure 1 shows, 72 per cent of the respondents are developing economies, while the rest are developed economies. Most regions of the world were represented in the survey.

Figure 1

Regional distribution of the participants in the UNCTAD survey

(Number of countries)



Source: UNCTAD.

The survey included the following questions under four categories:

Institutional arrangement

1. Does your country have a government ministry and/or national agency with overall responsibility for the cultural and creative industries?
2. Which department(s)/institution(s) deal with matters concerning specific cultural and creative industries?

National strategy

3. Which surveys, studies or assessments that evaluate the contribution of the creative economy/industries to the economy of your country have been carried out recently?
4. What national plan/strategy does your country have to promote/support the creative economy/industries?
5. Which creative economy sectors/industries have been identified as priorities in terms of their international trade potential?
6. What specific policy measures have been introduced to promote/support the creative economy/industries?

Measures to tackle the COVID-19 crisis

7. What COVID-19 emergency policy measures have been introduced to promote/support the creative economy/industries?
8. What survey/studies have been undertaken to assess the impact of COVID-19 on the creative economy/sectors/industries in your country?

Participation in the 2021 International Year of Creative Economy

9. What events/initiatives in support of 2021 International Year of Creative Economy did your country plan?

The Annex 2 presents the complete answers to the survey. While the perception survey does not provide a comprehensive picture of the state of the global creative economy and industries, it gives a snapshot of the ways countries envision the creative economy and the approach they use to support its development.

1. Institutional arrangements

Almost all countries that responded to the survey (28 out of 33) have at least one entity in charge of the creative economy and creative industries. But in most countries, several agencies have shared the responsibility of the sector. Countries such as Canada, the Central African Republic, Colombia, Georgia, Germany, Honduras, Nicaragua, Panama, Peru, Slovenia, Turkey, and United Arab Emirates have a single national ministry, vice-ministry, or agency with overall responsibility for the creative economy. Ten countries have dedicated ministries of culture, the most often mentioned institution. Most countries split duties for the creative industries across multiple ministries and agencies, such as ministries of culture, sports, heritage, tourism, youth, trade, foreign affairs, intellectual property, telecommunications and innovation, and education. No two countries are alike in their institutional arrangements.

Figure 2 shows all the authorities mentioned in the survey that have a role in formulating creative economy policies in respondent countries. The more often an institution was mentioned, the larger it is in the figure. The responses provide a snapshot of the national organization *vis-à-vis* the creative economy at the government policy level.



during the second half of 2010s. In addition, multiple countries drafted national plans for their creative industries in 2020 and 2021 as an integral part of their post-COVID-19 recovery plan. Some countries, like Latvia, Portugal, Oman and Turkey included creative industries in their long-term national development or sustainable development strategies.

The survey results summarized in table 2 allow for a comparison of the dates when institutional support for the creative economy was first formally established. Since 2015, formal institutional recognition of the sector has rapidly spread throughout the developing world. It has, most recently, become firmly established in the Middle East. Box 1 highlights the focus and content of some of the national strategies and plans for the creative economy:

Table 2
National strategies and plans for creative industries

Country	National plan or strategy for creative industries	Year effective
Central African Republic	National Cultural Policy Document	2005
Latvia	Sustainable Development Strategy 2030	2010
Cambodia	National Policy for Culture	2014
Honduras	National Strategy to Revitalize the Tourism and Culture Industry	2014
Trinidad and Tobago	Strategic Plan for the Fashion Industry	2015
Georgia	Cultural Strategy 2025	2016
Mongolia	National Program on Cultural Production	2016
Russian Federation	Russian Cultural Policy Strategy to 2030	2016
Canada	Creative Canada Policy Framework	2017
Chile	National Culture Policy	2017
Chile	National Plan for the Promotion of the Creative Economy	2017
Morocco	Sectoral plan of the Ministry of Culture	2017
Poland	Creative Industries Package	2017
Trinidad and Tobago	Strategic Plan for the Music Industry	2017
Azerbaijan	State Program on Protection and Development of Carpet Art	2018
Canada	Creative Export Strategy	2018
Latvia	Cultural Education Sector Strategy	2018
Russian Federation	The National Project "Culture"	2018
Trinidad and Tobago	Strategic Plan for the Film Industry of Trinidad and Tobago	2018
Cambodia	Strategic Plan of the Ministry of Culture and Fine Arts	2019
Colombia	Protection and Promotion of the Culture and Development of the Orange Economy	2019
Ecuador	Comprehensive Plan for the Promotion of Culture – Creative Ecuador	2019

Table 2
National strategies and plans for creative industries (continued)

Country	National plan or strategy for creative industries	Year effective
Mexico	México Creativo	2019
Panama	Cultural Diplomacy Strategy	2019
Turkey	11th Development Plan	2019
Central African Republic	Reviewed National Cultural Policy Document	2020
Colombia	Orange Economy Integral Policy	2020
Myanmar	National Export Strategy (2020–2025) (Handicrafts)	2020
Nicaragua	National Strategy for Creative Economy	2020
Peru	National Cultural Policy	2020
Poland	Strategy for Social Capital Development (Cooperation, Culture, Creativity)	2020
Portugal	Strategic Vision for the 2020–2030 Economic Recovery Plan for Portugal	2020
Andorra	Development Plan for the Audio-visual Industry	2021
Guatemala	Orange Economy Commission of the Guatemalan Exporters Association (AGEXPORT)	2021
Latvia	National Development Plan of Latvia 2021–2027	2021
Oman	Oman Vision 2040	2021
Peru	Recovery Plan for Cultural and Arts Industries	2021
Russian Federation	Strategy of Development of Musical Instrument and Sound Equipment Industry	2021
United Arab Emirates	United Arab Emirates 10-year Cultural and Creative Industries Strategy	2021
Myanmar	Myanmar 4.0; E-Commerce; Digital Economic Development	Under development

Source: UNCTAD based on survey responses.



Box 1

Examples of national strategies and plans for the creative economy: Cambodia, Canada, Nicaragua and United Arab Emirates

Cambodia: The Strategic Plan of the Ministry of Culture and Fine Arts 2019–2023 focuses on increasing the conservation and development of cultural heritage to attract national and international tourists; promoting Cambodia to become a centre for performing arts and cultural products, and become a location for foreign film productions; creating employment opportunities in the field of culture; supporting and encouraging new creation in all areas such as music, audio-visual, film, publishing, performing arts, craft, painting, traditional weaving, design, and architecture; organizing festivals for exhibitions of new creative works and products of cultural and creative industries. The plan also seeks to expand the cultural market and products by promoting creativity and innovation in music, film, visual arts, handicrafts, traditional weaving, and design to artists and producers.

Canada: The Creative Canada Policy Framework of the Department of Canadian Heritage aims to invest in creators and cultural entrepreneurs. These framework targets professionals who contribute to the creation and production of work. It also promotes the discovery and distribution of Canadian content and aims to strengthen public broadcasting and support local news. Additionally, the Creative Export Strategy is the Government of Canada's main mechanism for supporting export in the creative sector. It was launched in 2018 in partnership with Global Affairs Canada, Canada's foreign affairs and trade ministry. The Strategy offers creative businesses and organizations funding, business opportunities through trade missions and trade programming at domestic and international cultural events, and support in Canadian embassies abroad through the Canadian Trade Commissioner Service at Global Affairs Canada.

Nicaragua: The National Strategy for Creative Economy and the National Creative Nicaragua Program, overseen by the National Commission for Creative Economy, foster entrepreneurship and the use of science, research, and technology for innovation in production systems. It aims to strengthen micro, small and medium-sized companies by helping them scale up, making them more competitive and focusing on human development that promotes identity, social inclusion, and cultural diversity. The Cultural Policy of the Government of Nicaragua recognizes the right of the population to create and enjoy art and culture. It supports opening spaces, instruments, exchanges, and possibilities at the local level for knowledge, appreciation, education and specialized training, and defence of all forms of art and culture.

United Arab Emirates: The Ministry of Culture and Youth launched the 10-year Cultural and Creative Industries Strategy to develop the sector and increase its size and activity. The strategy aims to put the country on the cultural and creativity map and enhance global competitiveness. The strategy positions the creative economy among the top ten economic sectors in the country to contribute to 5 per cent of the GDP. The national strategy, a first of its kind in the region, highlights the country's pivotal role in empowering and inspiring creative thinking and as a destination of choice for cultural practitioners and creative entrepreneurs worldwide. Additionally, the country's Talent Support Policy for the Cultural Sector aims to support cultural talent throughout different life cycles of products, services, and activities.

Source: UNCTAD based on survey responses.



3. Studies on the economic contribution of the creative economy

In recent years, some countries have increasingly turned their attention to capturing the economic contribution of their creative industries. Annex 2 provides details of and links to each of the national studies and surveys countries reported.

Countries produce various statistics about the creative economy: contribution to gross domestic product (GDP) or gross value added (GVA), sometimes disaggregated by creative subsectors such as art, audio-visual, film industry, etc.; share from total exports and imports; the number of employed persons and share from total employment sometimes disaggregated by creative industry, age and gender; the number of enterprises in the creative sector and their turnover disaggregated by industry and enterprise size; and statistics about participation in culture.

Although some countries have adopted similar statistical methodologies (such as Culture Satellite Accounts or the Eurostat guidelines for culture statistics in the European Union), the lack of yearly reporting and divergent definitions and methods applied in different countries make international comparisons difficult. For example, some countries try to measure the significance of “culture and creative industries” while others of “copyright-based industries”.

Whereas reporting on cultural and creative industries (CCIs) in some countries tends to be sporadic, in others, it occurs regularly. For example, Canada updates its Culture Satellite Account every year, developed by Statistics Canada with the support of a diverse group of partners referred to as the Culture Statistics Strategy Consortium. Countries like Colombia, Guatemala, Mexico, Peru, and Portugal have also developed Culture Satellite Accounts.

Some countries have carried out mapping exercises and specialized surveys to identify firms and actors in certain creative industries and estimate their economic contribution. Chile, for example, recently conducted a mapping of the music and entertainment industry sector and a mapping of companies providing virtual and augmented reality services.

Several studies in Latin America and the Caribbean highlight the importance of the regional dimension. For example, in 2017, Bolivia, Colombia, Ecuador, and Peru carried out the first study on the contribution of creative industries at the regional level for the Andean Community (*Ministerio de Culturas y Turismo de Bolivia et al.*, 2018). Another study reviews the creative and cultural industries in twenty-two Ibero-American countries (*Fundación Iberoamericana de las Industrias Culturales y Creativas*, 2018).

Some countries, like Azerbaijan and Georgia, cooperated with UNESCO to estimate their creative economy’s economic contribution. Others, like Trinidad and Tobago or Turkey, developed studies together with WIPO about the economic contribution of copyright-based industries.

Figure 3 highlights some recent facts and figures about the creative economy in countries that participated in UNCTAD’s survey.

Figure 3

Measuring the creative economy: recent facts and figures

Azerbaijan

As of 2018, the value added by **cultural and creative industries** to the GDP amounts to

1%

The percentage of employment directly related to **culture** is

3.8%

Belgium

In 2014, **cultural and creative economy** represented

4.3%

of the GDP of Brussels.

Cultural and creative economy accounted for

4.7%

of employment in Brussels only, about

32,200

people.

Canada

In 2019, **culture and sport** represented

3%

of the GDP and employed

672,000

people.

Culture represented:

2.5%

of total exports

2.9%

of total imports

Chile

In 2018, **creative economy firms** were:

micro-enterprises

76%

small enterprises

19%

In 2011, over

409,400

persons worked in **creative industries**.

Colombia

Between **January and September 2021**, over

490,770

persons worked in Colombia's **orange economy**.

In Bogota, **cultural industries** of the **orange economy** account for

25.1%

Arts and heritage sector for

11.2%

Ecuador

In 2014, the estimated contribution of **copyright industries** to the GDP was

4.5%



Figure 3

Measuring the creative economy: recent facts and figures (continued)

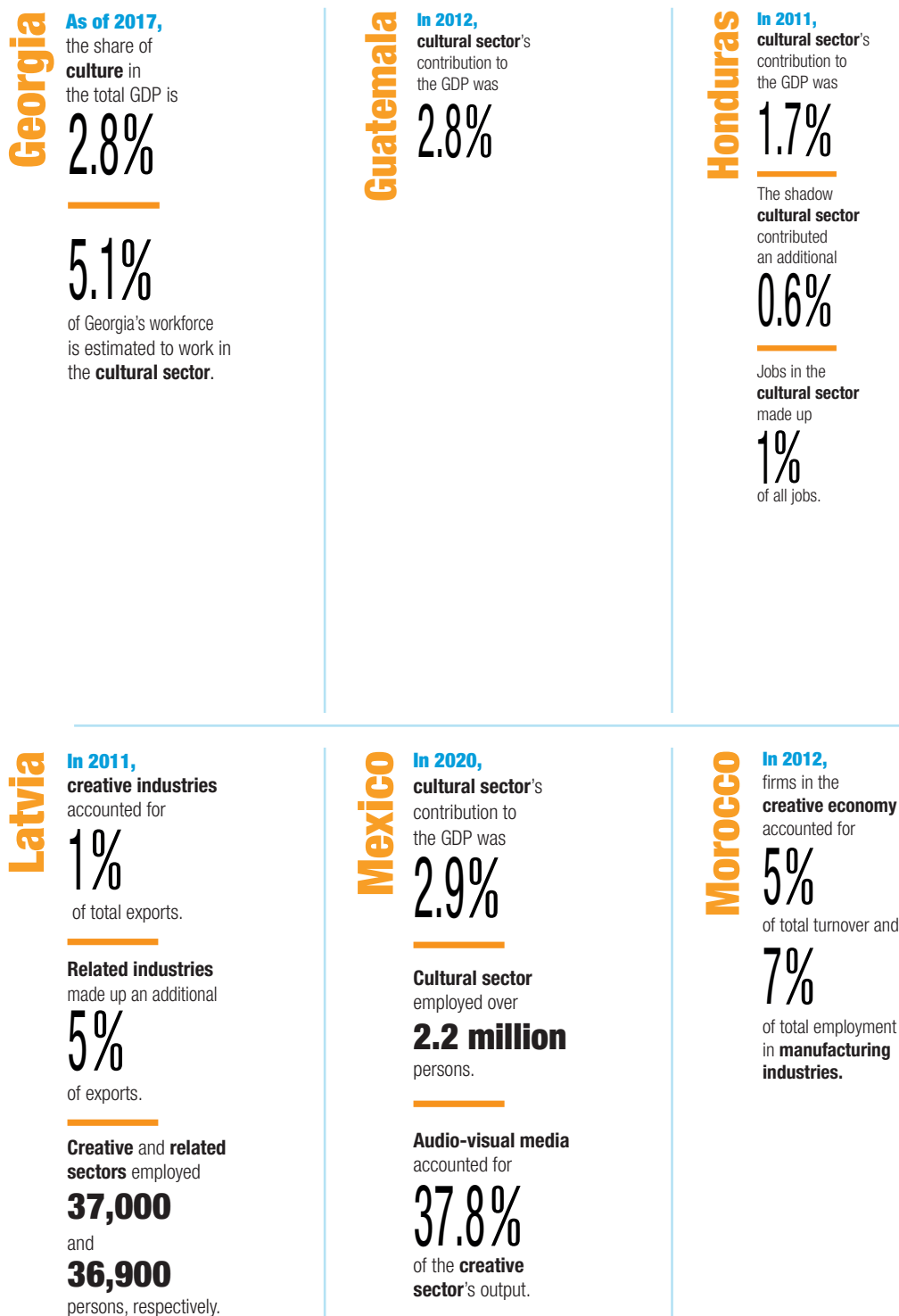


Figure 3

Measuring the creative economy: recent facts and figures (continued)

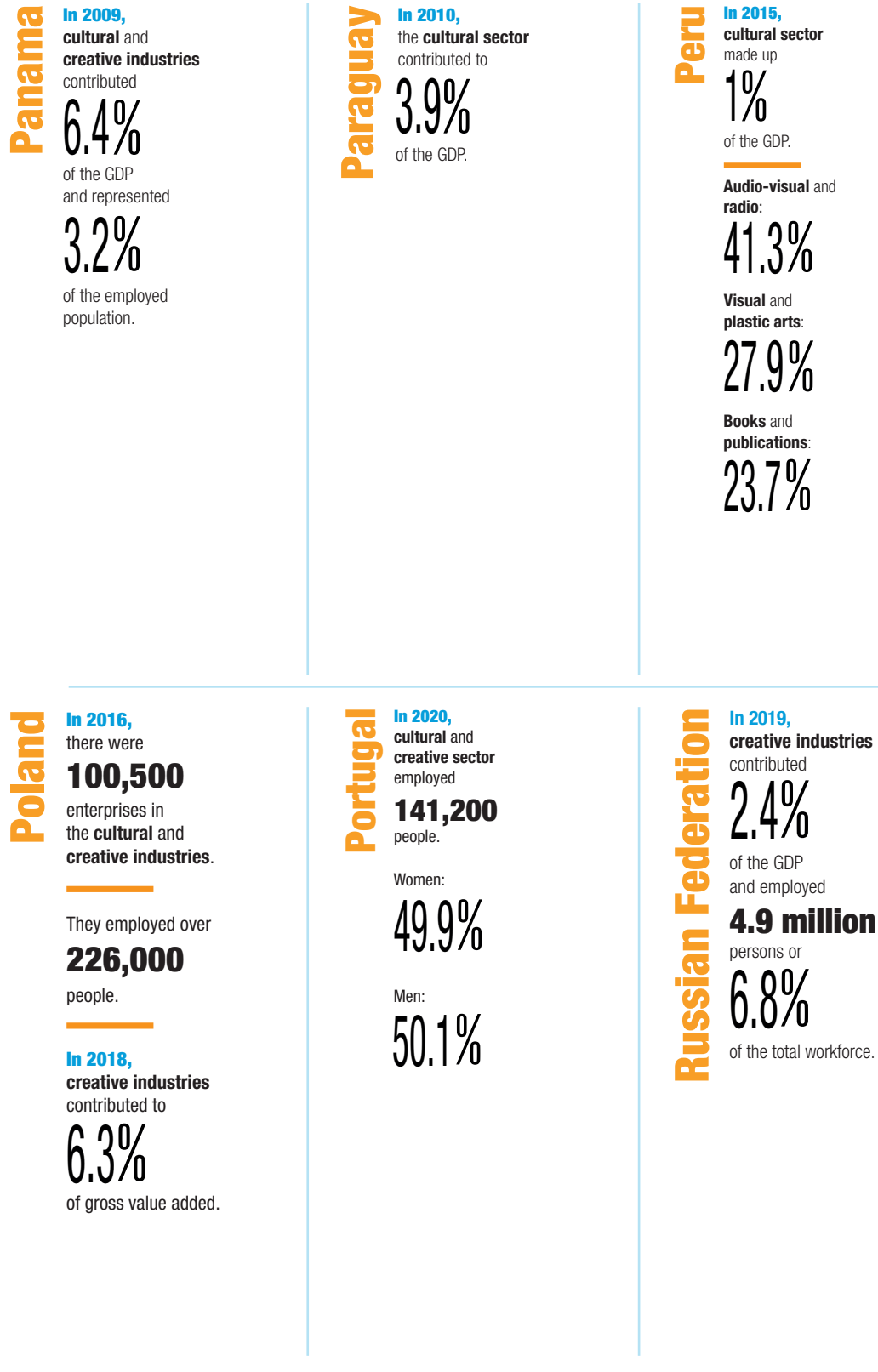
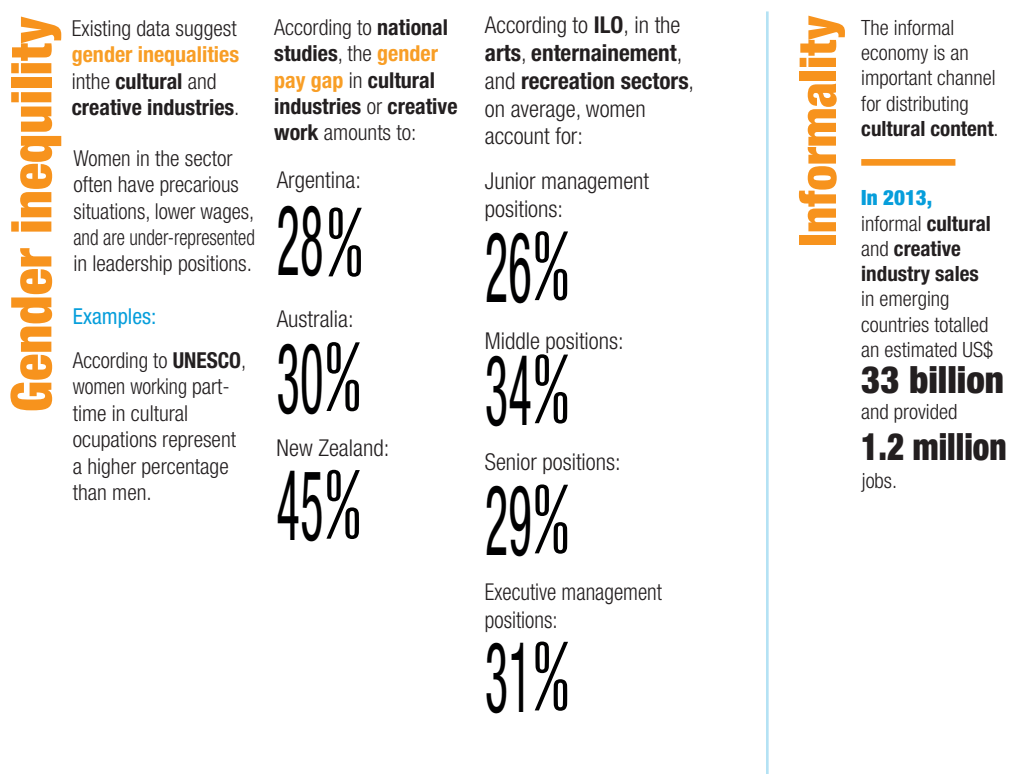


Figure 3

Measuring the creative economy: recent facts and figures (continued)



Source: UNCTAD based on survey responses; ILO (2019); and UNESCO (2015 and 2021a).

Note: For references, please see page 95.

4. Priority industries for international trade

Several respondent countries have identified specific sectors as a priority for international trade. The most often highlighted industries included music (mentioned by 15 out of the 33 respondent countries), followed by audio-visual arts and industry (12), fashion (9), videogames (9), design (7), performing arts (6), animation (6) and film industry (5). Figure 4 shows the creative industries highlighted by countries. The more often a sector was mentioned, the larger it is in the figure.

Figure 4
Priority creative industries in terms of their international trade potential
 (Word cloud based on the UNCTAD survey)



Source: UNCTAD based on survey responses.
 Created with wordart.com.

C. International trade trends in creative goods and services

Trade in creative goods and services are generating increasing revenues for countries. Exports of creative goods increased by more than 2.5-fold over the past two decades, while those of creative services also doubled over the last decade. Total exports in creative services surpassed exports of creative goods. While the share of creative goods from total exports slightly decreased over the years (representing 3 per cent of total trade in goods in 2020), the percentage of creative services from all services exports has shown a spectacular growth from 12 per cent in 2010 to 21 per cent in 2020.

International trade in creative goods and services is regionally unbalanced and concentrated in a handful of economies. The top ten exporters capture 68.2 per cent of the creative goods exports, while the ten largest creative goods importers capture 63 per cent of imports. Developing countries account for the majority of creative goods exports, while developed countries account for most imports. The same concentration is true for creative services, but with developed countries largely dominating creative services exports. The ten largest exporters account for 70 per cent of total creative services exports.

This chapter uses UNCTAD data as of May 2022. It is important to note that there are important data availability challenges. Trade in creative goods data have relatively good availability and country coverage. However, many developing countries have no available data or do not report data at the necessary granularity.⁴⁵ More could be done in data collection and reporting to capture developing countries' participation.

1. International trade in creative goods

UNCTAD has set up the definition of what may be creative goods in international trade based on the Harmonized Commodity Description and Coding System, generally referred to as "Harmonized System (HS)" and measures the trade flows according to official data reported to the United Nations COMTRADE Database. There are 197 creative goods⁴⁶ identified at the HS 6-digit level that fall under the following sub-categories:

- art crafts (carpets, products related to celebration, other crafts, paperware, wickerware, and yarn);
- audio-visuals (films and CDs, DVDs and tapes);
- design (architecture, fashion, glassware, interior, jewellery, and toys);
- new media (recorded media and video games);
- performing arts (musical instruments and printed music);
- publishing (books, newspapers, and other printed matter); and
- visual arts (antiques, painting, photography, and sculpture).

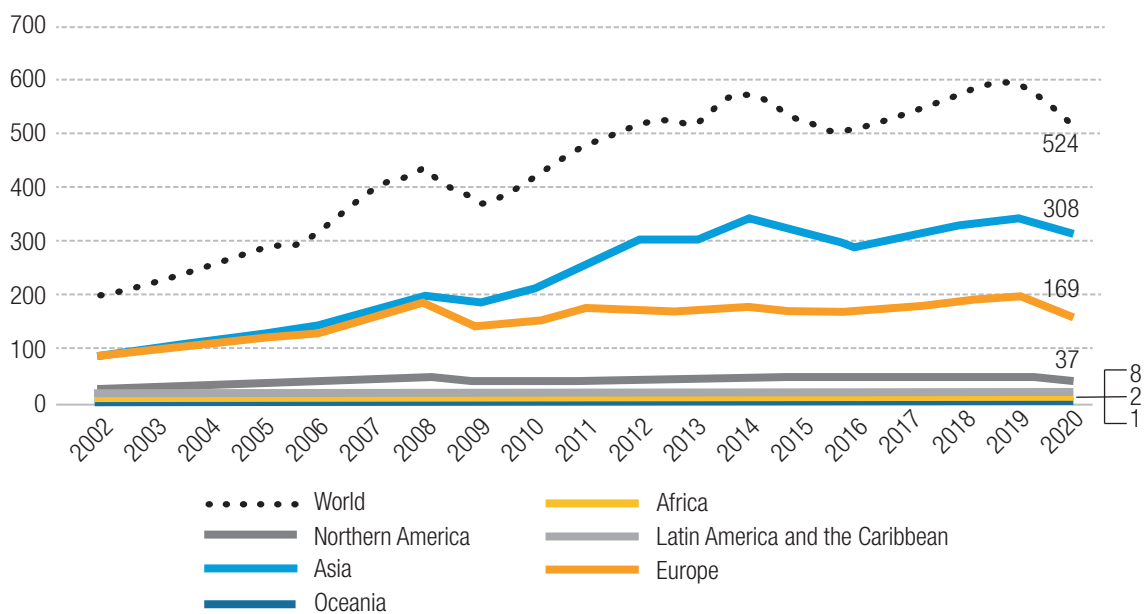
While the COMTRADE Database continuously receives updated reports from countries, as of May 2022, only 76 countries have reported their trade in goods data for 2021. This will limit the reliability of data when aggregated according to geographical regions or country groups. Data availability up to 2020 is significantly better. Therefore, unless otherwise indicated, this report will consider trade in creative goods between 2002 and 2020.

Global trends in creative goods exports

Creative industries make a significant contribution to international trade in goods. World exports of creative goods increased from US\$ 208 billion in 2002 to US\$ 524 billion in 2020 (figure 5). Since 2007, Asia has been the largest exporter of creative goods (with the exports of creative goods amounting to

US\$ 308 billion in 2020), followed by Europe (US\$ 169 billion), Northern America (US\$ 37 billion). Asia's dominant role in creative goods exports is driven by China, which alone accounted for 32 per cent of global creative goods exports.

Figure 5
Exports of all creative goods by region, 2002–2020
(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

Creative goods exports on average grew by 3.5 per cent a year from 2006 through 2020, compared to a 2.4 per cent average annual growth of total exports (see table 3). As shown in figure 6, creative goods exports were more resilient in 2009 during the global financial and economic crisis and in 2015–16 during a global trade slowdown. Growth in the exports of creative goods slowed down between 2016 and 2020. One of the reasons is a “dematerialization” in creative trade: due to digitization, creative goods are increasingly becoming creative services. Another factor is that global merchandise exports already started to slow down in 2019. Merchandise exports decreased by 2.8 per cent in 2019, while creative goods exports grew by only 2.6 per cent the same year. The COVID-19 pandemic intensified these trends.

Creative goods exports were hit hard by the COVID-19 pandemic and lockdowns around the world: creative goods exports were down by 12.5 per cent in 2020, while exports of all goods fell by 7.2 per cent. This can be due to the lack of physical exchanges on the global art market, an important distribution channel for visual arts, and increasing digitization in the audio-visual and publishing sector (UNESCO, 2022).

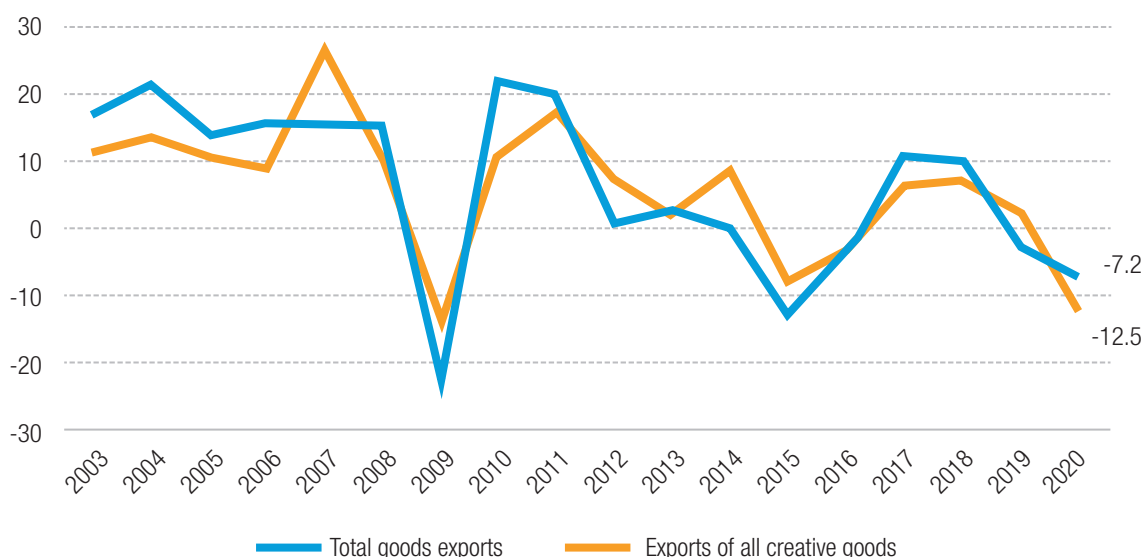
Preliminary data show that exports of creative goods began to recover in 2021 and surpassed 2019 levels. As of May 2022, not all countries have reported their trade data for 2021. Based on the available data, the United Kingdom (-47 per cent), India (-34.6 per cent), and Switzerland⁴⁷ (-31.7 per cent) experienced a significant fall in their creative exports in 2020, while some countries like Malaysia (13.7 per cent) and Poland (7.8 per cent) still registered positive export growth in 2020. Among the significant exporters where data for 2021 are available, exports of creative goods bounced back, with Italy (36.9 per cent), India (36.4 per cent), and Switzerland (20.4) registering the most considerable growth. 2021 global merchandise exports surpassed 2019 levels. In most countries, including Italy, Germany, and Hong Kong (China), 2021 creative goods exports also surpassed 2019 levels. Exceptions include the United States of America, United Kingdom and India, where creative goods exports stayed well below the levels registered pre-COVID-19.

Table 3
Average annual export growth rates of creative goods, 2006–2020
 (Percentage)

Region	2006–2010	2011–2015	2016–2020	2006–2020	2020
Developing economies	9.8	4.9	2.0	5.9	-10.6
Developed economies	1.5	0.2	0.3	1.3	-14.9
Least developed countries	19.5	4.2	38.3	10.1	-2.2
Small island developing States	12.8	-0.6	-29.8	-3.9	-48.5
World – creative goods	5.1	2.7	1.2	3.5	-12.5
World – all goods	3.6	-1.8	2.6	2.4	-7.2

Source: UNCTAD based on UN COMTRADE Database.

Figure 6
Global annual export growth rate, total goods exports versus exports of creative goods, 2003–2020
 (Percentage)



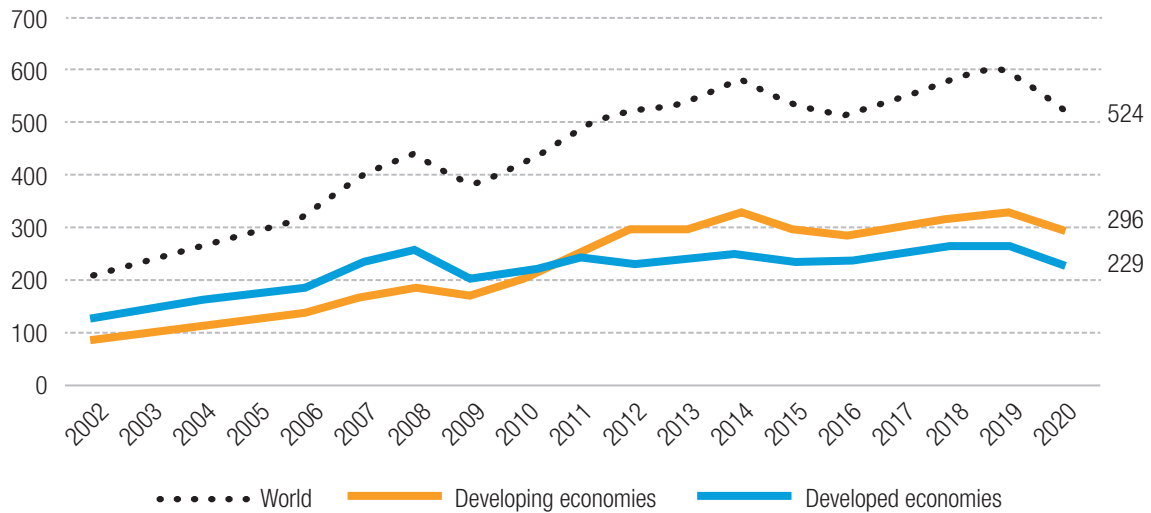
Source: UNCTAD based on UN COMTRADE Database.

Since 2011, developing economies have exported more creative goods than developed economies (see figure 7). In 2020, the five largest developing economy exporters of creative goods were China, Hong Kong (China), Viet Nam, Republic of Korea, and India. The five largest developed economy exporters were the United States of America, Italy, Germany, France, and the United Kingdom. The average annual export growth of creative goods between 2006–2020 was 5.9 per cent for developing countries versus 1.3 per cent for developed countries.

Figure 7

Exports of all creative goods by developing and developed economies, 2002–2020

(US\$ billion)



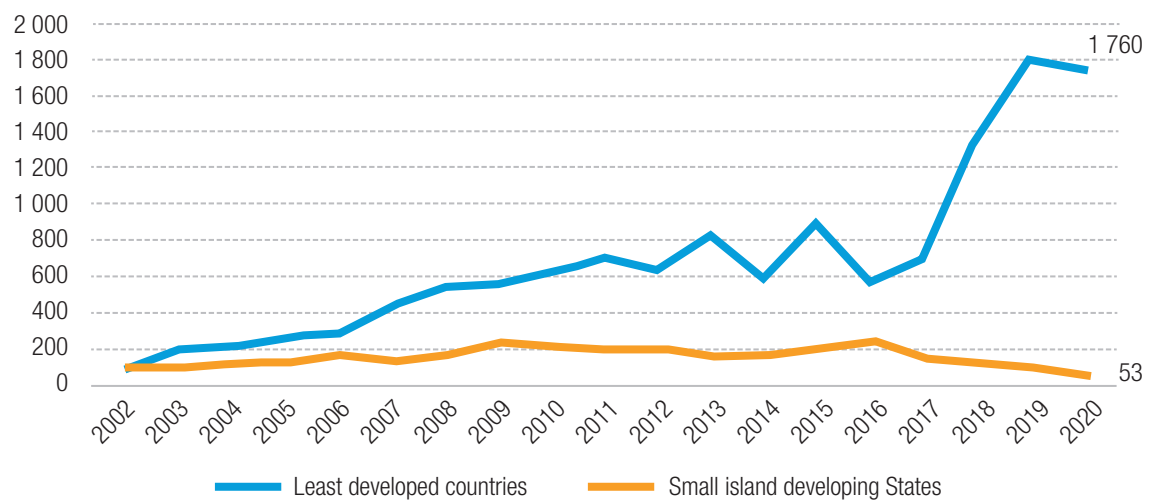
Source: UNCTAD based on UN COMTRADE Database.

Creative goods exports of least developed countries (LDCs) have dynamically increased in the past two decades, although with some erratic flows in certain years (see table 3). In contrast, creative goods exports by small island developing States (SIDS)⁴⁸ have been on the decline. As shown in figure 8, creative goods exports by LDCs and SIDS amounted to US\$ 1.8 billion and US\$ 53 million, respectively, in 2020.

Figure 8

Exports of all creative goods by least developed countries and small island developing States, 2002–2020

(US\$ million)



Source: UNCTAD based on UN COMTRADE Database.

Globally, the share of all creative goods from total exports slightly declined between 2002 and 2020, decreasing from 3.2 per cent in 2002 to 3 per cent in 2020. Due to technological development, over the past two decades, the composition of creative goods exports went through some remarkable changes.

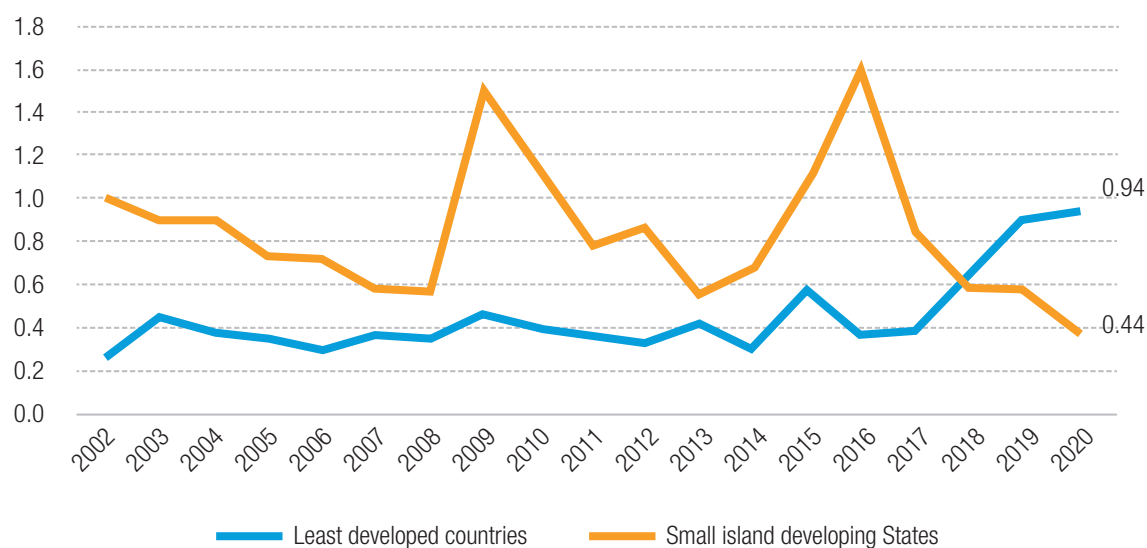
The exports of CDs, DVDs, tapes, newspapers and other printed materials significantly decreased, while the exports of recorded media and video games surged. There are noteworthy geographical differences. In Asia, creative goods represent a much higher export share, 4.1 per cent in 2020, the same as in 2002. Asian countries export an important amount of interior, fashion, and jewellery design products, but they are also increasingly exporting toys, recorded media products and video games. In Europe, the percentage share of creative goods in exports fell from 3.1 per cent in 2002 to 2.5 in 2020. During the same period, in Northern America, it fell from 2.8 to 2 per cent, in Latin America and the Caribbean from 1.6 to 0.8 per cent, in Oceania from 1.1 to 0.4 per cent, while in Africa from 0.7 to 0.4 per cent.

Creative goods exports, although still at low levels, have an increasing significance for LDCs. In 2020, LDCs claimed 1 per cent of global exports, but only 0.3 per cent of global creative goods exports. However, LDCs increased their creative goods exports by more than seventeen-fold between 2002 and 2020. The share of creative goods exports from LDC's total exports is also increasing, through the expanding exports of fashion and interior design products. Only in the past five years, it expanded from 0.37 to 0.94 per cent (figure 9). SIDS are a diverse group of countries that are highly vulnerable to external economic shocks (UNCTAD, 2021a). They tend to export more services than goods. Their creative goods exports have been declining, and their share from total merchandise exports have been erratic over the past decades.

Figure 9

Share of creative goods exports from total exports in least developed countries and small island developing States, 2002–2020

(Percentage)



Source: UNCTAD based on UN COMTRADE Database.

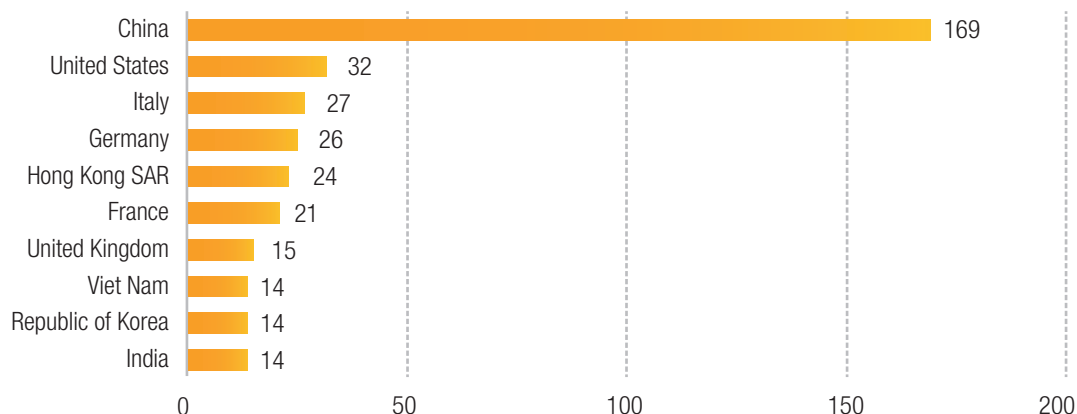
Main exporters

A small group of countries account for more than two-thirds of global creative goods exports. In 2020, China was by far the largest exporter of creative goods (US\$ 169 billion), followed by the United States of America (US\$ 32 billion) and Italy (US\$ 27 billion). The list of the world's ten leading exporters of creative goods in 2020 counts five economies from Asia, four from Europe, and one from Northern America (see figure 10). Altogether, the top ten exporters accounted for 68.2 per cent of global exports in creative goods. Although 2020 was an exceptional year because of the COVID-19 pandemic, the list of top ten exporters did not change significantly between 2020 and previous years. In 2020, two countries, Switzerland and the United Arab Emirates, left the top ten list, while Viet Nam and the Republic of Korea joined.

Figure 10

Top ten exporters of creative goods worldwide, 2020

(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

Tables 4 and 5 list the top ten exporters of creative goods from developed and developing economies in 2020. The table also shows the relative importance of creative goods exports for these countries. Among developed countries, in Italy, France, Poland, Switzerland the United Kingdom creative goods exports are more significant than the global and regional average. Among developing countries, in China, India, Turkey, and Viet Nam creative goods exports represent more than 5 per cent of total merchandise exports. For developing countries, Asian economies dominate creative goods exports. This highlights the challenges of African countries and LDCs in increasing their participation in global trade and diversifying their exports as many of them over-rely on commodity exports (UNCTAD, 2022a).

Table 4

Developed economies: top ten creative goods exporters, 2020

	Developed economies	Exports of creative goods (US\$ million)	Share from world exports of creative goods (Percentage)	Share of creative goods from country's total exports (Percentage)
1	United States	32 371	6.2	2.3
2	Italy	27 031	5.2	5.4
3	Germany	26 064	5.0	1.9
4	France	21 438	4.1	4.4
5	United Kingdom	15 331	2.9	3.8
6	Republic of Korea	13 900	2.7	2.7
7	Poland	11 593	2.2	4.2
8	Switzerland	10 868	2.1	3.4
9	Netherlands	10 781	2.1	1.6
10	Japan	7 326	1.4	1.1
	Total	176 704	33.7	

Source: UNCTAD based on UN COMTRADE Database.

Table 5
Developing economies: top ten creative goods exporters, 2020

	Developing economies	Exports of creative goods (US\$ million)	Share from world exports of creative goods (Percentage)	Share of creative goods from country's total exports (Percentage)
1	China	169 309	32.3	6.5
2	Hong Kong SAR	24 067	4.6	4.4
3	Viet Nam	14 153	2.7	5.0
4	India	13 785	2.6	5.0
5	Taiwan Province of China	13 040	2.5	3.8
6	Malaysia	9 716	1.9	4.1
7	Singapore	9 351	1.8	2.6
8	Turkey	9 341	1.8	5.5
9	United Arab Emirates	9 219	1.8	2.8
10	Thailand	5 015	1.0	2.2
	Total	276 997	52.8	

Source: UNCTAD based on UN COMTRADE Database.

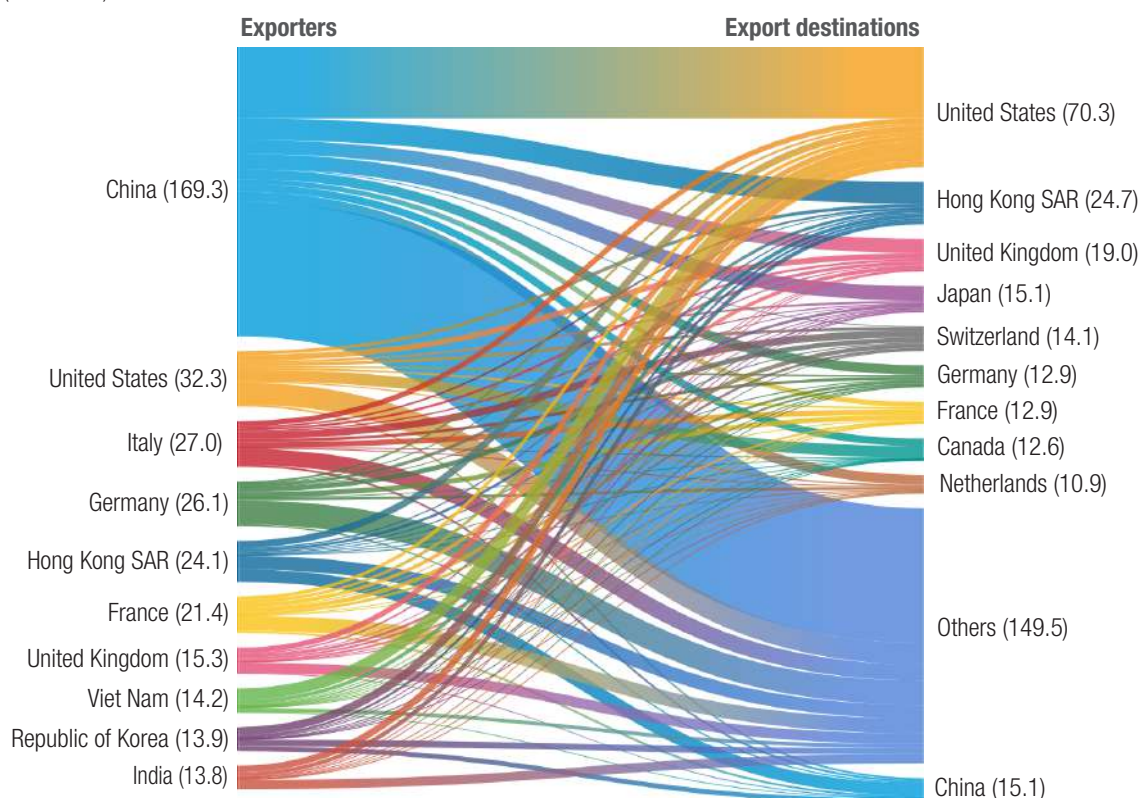
Figure 11 shows the export flows and destinations of the leading creative goods exporters. On the left-hand side are the top ten exporters of creative goods in 2020, and on the right-hand side are the top ten importers. The width of the arrows is proportionate to the value of creative goods exports. China was by far the biggest exporter, followed by the United States of America, Italy, etc. On the export destination side, the United States of America outranks all other countries by far, followed by Hong Kong (China), the United Kingdom, etc. Others include the rest of the world.

The most significant bilateral creative goods exports go from China to the United States of America, amounting to US\$ 41.5 billion in 2020. The second-largest bilateral creative goods exports were from China to Hong Kong (China) (US\$ 12.7 billion), followed by China to Japan (US\$ 8.7 billion), China to the United Kingdom (US\$ 8.2 billion), Hong Kong (China) to China (US\$ 7.4) and the United States of America to Canada (US\$ 6.8 billion).

Figure 11

Export flows and destinations of top ten major exporters of creative goods, 2020

(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

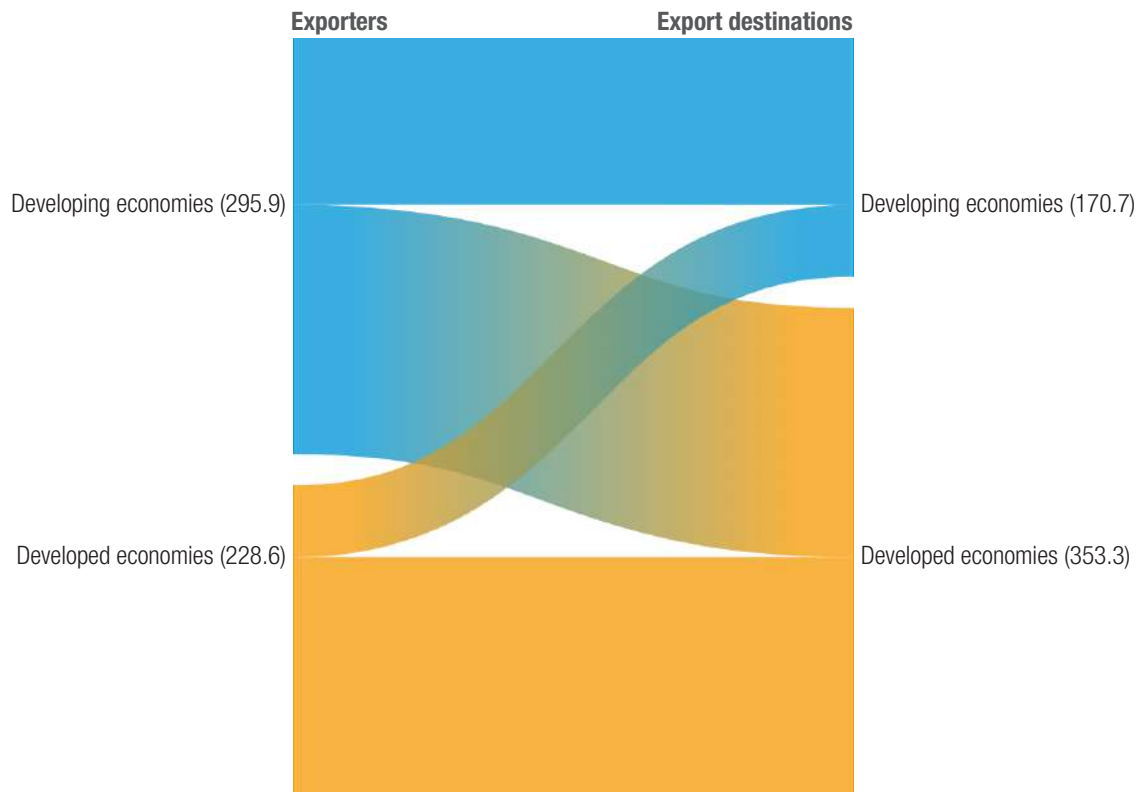
Notes: Top ten exporters of creative goods represent 68.2 per cent of global exports. 58.2 per cent of their exports go to ten main export destinations.

Created with flourish.studio.

South-South trade in creative goods has almost doubled in the past two decades. In 2020, South-South trade in creative goods represented 40.5 per cent of creative exports by developing economies (see figure 12). It mainly involves exports of jewellery, interior design products, recorded media, fashion, and toys. South-South trade can be an important tool for developing economies to create new trading opportunities and diversify exports. Developed economies, on the other hand, tend to mainly exchange cultural goods among themselves. In 2020, 77.6 per cent of their creative exports were shipped to other developed markets. This suggests that countries with a common language, past colonial links and similar “cultural tastes” are more likely to trade in cultural goods (Disdier *et al.*, 2010).

Figure 12**Export flows and destinations by developing and developed economies, 2020**

(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.
Created with flourish.studio.

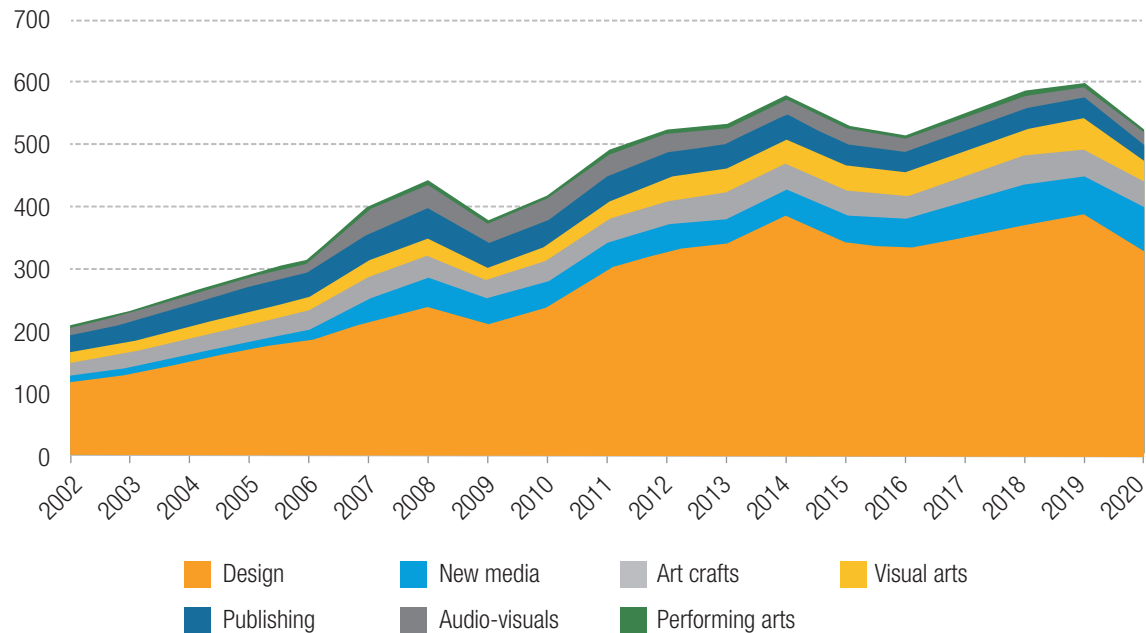
Main exported products

Figure 13 shows global creative goods exports by product groups for 2002–2020. Design goods have been dominating creative goods exports. In 2020, design goods accounted for 62.9 per cent of total creative goods exports, followed by new media products (13.4 per cent), art crafts (8 per cent), visual arts (6.2 per cent), publishing (5.4 per cent), audio-visuals (3.1 per cent), and performing arts (1 per cent). Among design goods, the main exported products are interior design products (20.1 per cent of total creative exports), fashion (15.9 per cent), jewellery (15.3 per cent), and toys (11.4 per cent).

Figure 13

World creative goods exports by product groups, 2002–2020

(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

All creative product groups experienced substantial losses in exports in 2020 due to COVID-19, except new media products, which registered an annual growth of 18.1 per cent. Visual arts exports contracted by 36.4 per cent, followed by design goods (15.2 per cent), publishing (14.3 per cent), audio-visuals (7.1 per cent), art crafts (4.2 per cent), and performing arts (3.2 per cent).

Products that experienced a positive export growth in 2020 were those in high demand during lockdowns and travel restrictions, such as recorded media products (25.7 per cent), celebration goods (8.8 per cent), video games (5.8 per cent), toys (5.3 per cent), films (2.9 per cent), and wickerware (2.6 per cent).

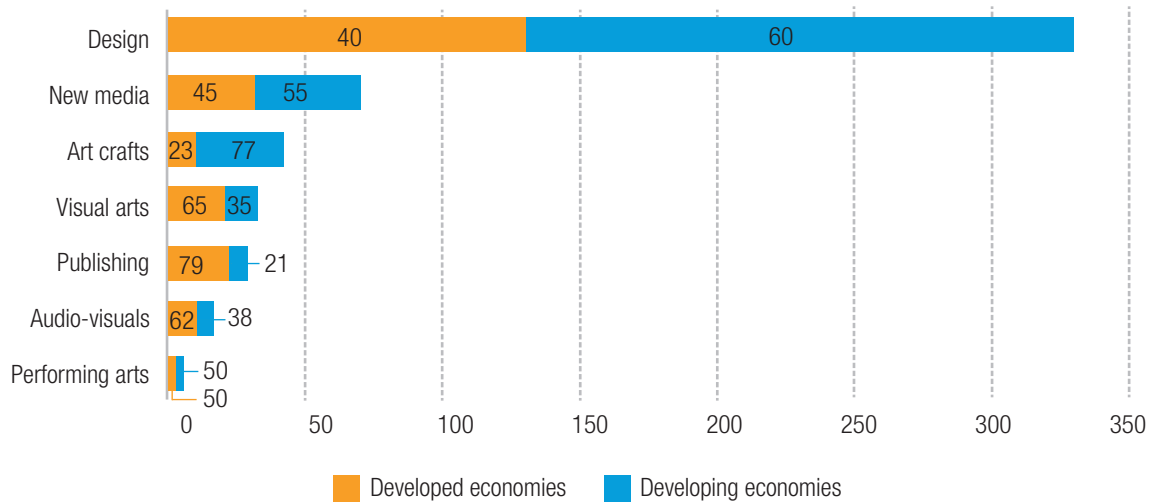
Many other creative goods exports experienced double-digit losses in 2020. The products that saw the largest drop in exports were paintings (-49.7 per cent), jewellery (-35.2 per cent), architecture (-33.7 per cent), and antiques (-33.2 per cent).

While design and new media products are the most exported creative goods in both groups, developed and developing countries export slightly different product groups. Developed countries dominate the exports of publishing, visual arts and audio-visuals, while developing countries dominate the exports of design and art craft (see figure 14). Figure 15 compares the share of different product groups from total creative goods exports in developing and developed economies. Publishing (10 per cent of total creative goods exports of developed countries), visual arts (9 per cent) and audio-visuals (4 per cent) represent a much larger share of developed economies' creative exports compared to developing economies.

Figure 14

Total export of creative goods by product groups and level of development, 2020

(US\$ billion and percentage share)

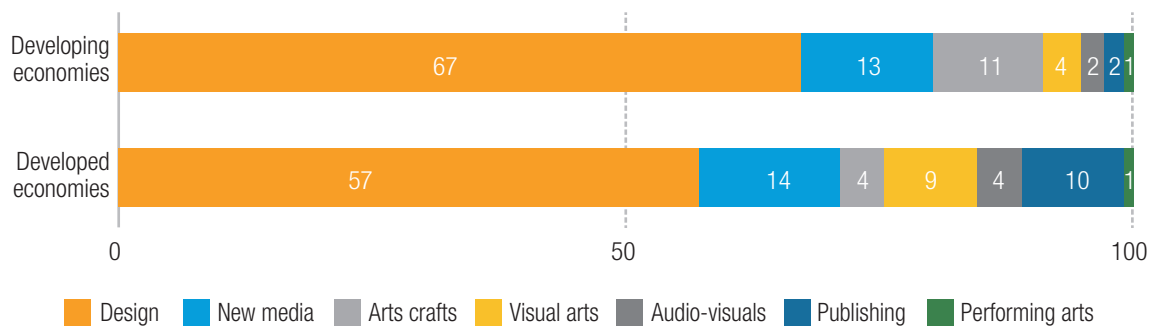


Source: UNCTAD based on UN COMTRADE Database.

Figure 15

Creative goods exports by products groups and by level of development, 2020

(Percentage share)



Source: UNCTAD based on UN COMTRADE Database.

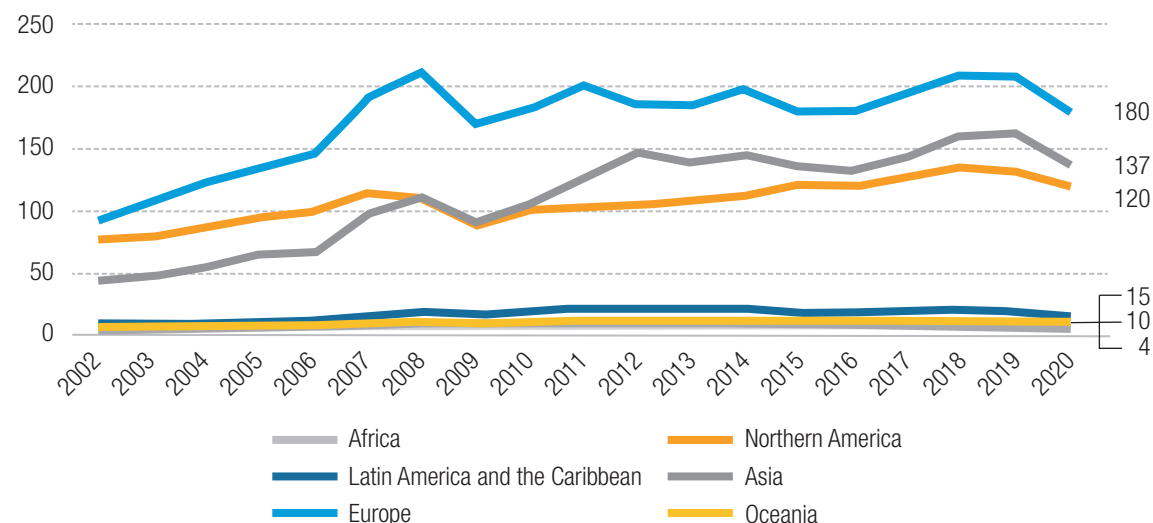
Global trends in imports of creative goods⁴⁹

Europe is the largest importer of creative goods (with the imports of creative goods amounting to US\$ 180 billion in 2020), followed by Asia (US\$ 137 billion), Northern America (US\$ 120 billion), Latin America and the Caribbean (US\$ 15 billion), Oceania (US\$ 10 billion), and Africa (US\$ 4 billion) (see figure 16). Developed countries import more creative goods than developing ones (see figure 17).

Figure 16

Global imports of all creative goods by region, 2002–2020

(US\$ billion)

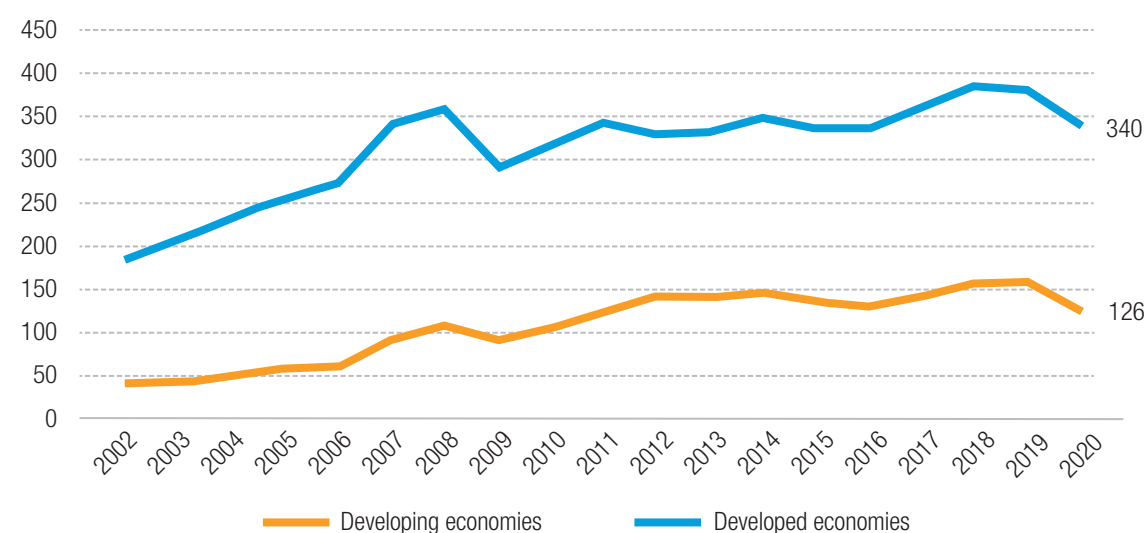


Source: UNCTAD based on UN COMTRADE Database.

Figure 17

Imports of all creative goods by developing and developed economies, 2002–2020

(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

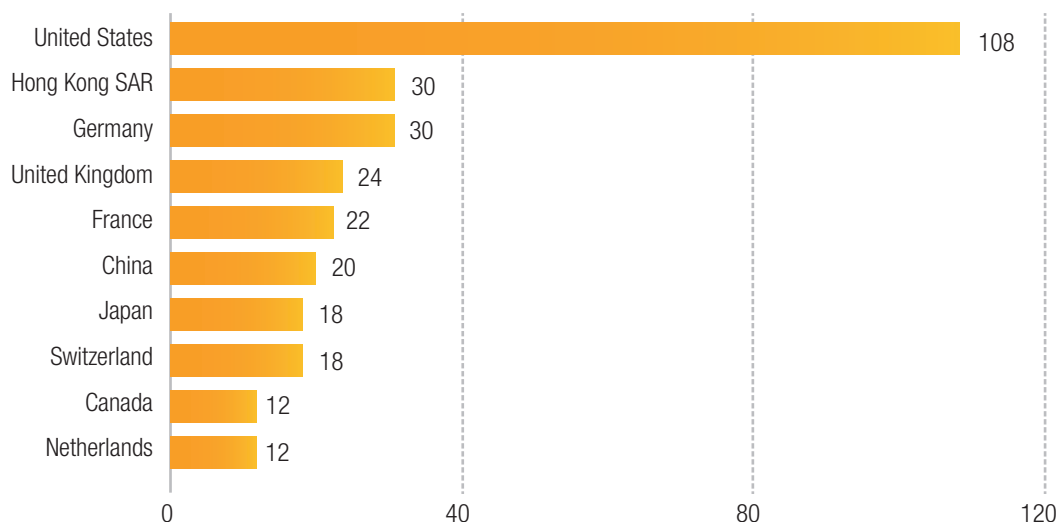
Main importers

The world's largest importers of creative goods account for almost two-thirds (63 per cent) of global imports of creative goods. In 2020, the United States of America was by far the largest importer of creative goods (US\$ 108 billion), followed by Hong Kong (China) (US\$ 30 billion) and Germany (US\$ 30 billion). The list of the world's ten leading importers of creative goods in 2020 counts five economies from Europe, three from Asia, and two from Northern America (see figure 18). In addition, tables 6 and 7 list the top twenty importers of creative goods from developed and developing countries in 2020.

Figure 18

Top ten importers of creative goods worldwide, 2020

(US\$ billion)



Source: UNCTAD based on UN COMTRADE Database.

Table 6

Developed economies: top ten creative goods importers, 2020

	Developed economies	Imports of creative goods (US\$ million)	Share from world imports of creative goods (Percentage)	Share of creative goods from country's total imports (Percentage)
1	United States	108 111	23.2	4.5
2	Germany	29 964	6.4	2.6
3	United Kingdom	23 527	5.0	3.7
4	France	22 377	4.8	3.8
5	Japan	18 162	3.9	2.9
6	Switzerland	17 662	3.8	6.0
7	Canada	11 884	2.5	2.9
8	Netherlands	11 510	2.5	1.9
9	Italy	10 502	2.3	2.5
10	Republic of Korea	9 833	2.1	2.1
	Total	263 533	56.5	

Source: UNCTAD based on UN COMTRADE Database.

Table 7
Developing economies: top ten creative goods importers, 2020

	Developing economies	Imports of creative goods (US\$ million)	Share from world imports of creative goods (Percentage)	Share of creative goods from country's total imports (Percentage)
1	Hong Kong SAR	30 493	6.5	5.4
2	China	19 937	4.3	1.0
3	United Arab Emirates	10 481	2.2	4.2
4	Singapore	7 528	1.6	2.3
5	Mexico	6 689	1.4	1.7
6	Taiwan Province of China	5 853	1.3	2.0
7	Thailand	5 603	1.2	2.7
8	Saudi Arabia	3 525	0.8	2.6
9	Malaysia	3 078	0.7	1.6
10	Viet Nam	3 042	0.7	1.2
	Total	96 228	20.6	

Source: UNCTAD based on UN COMTRADE Database.

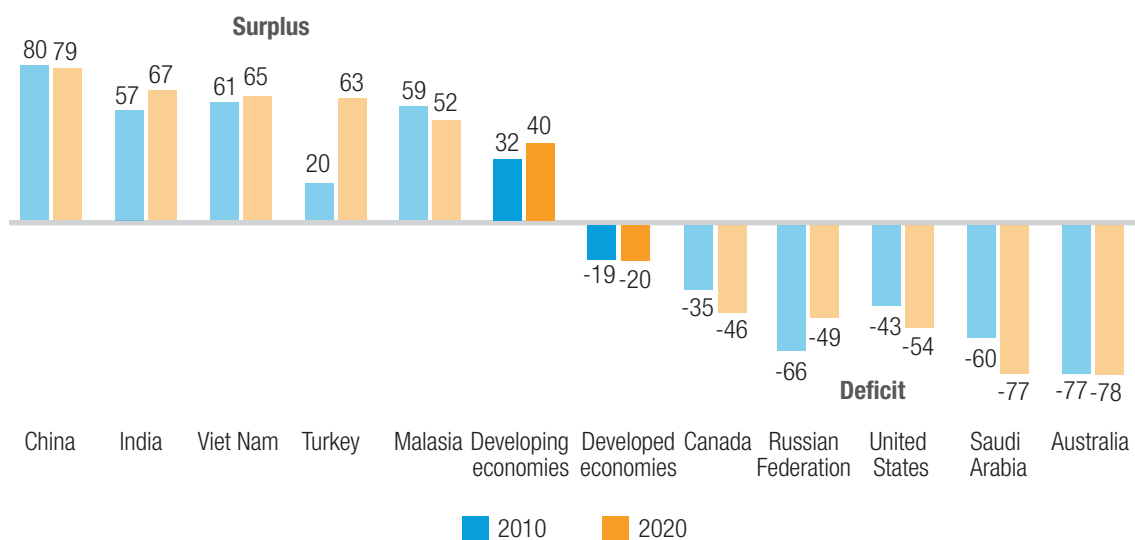
Trade balance in creative goods

In 2010, China had the highest trade surplus globally in creative goods. This trend continued and increased from US\$ 91.5 billion in 2010 to US\$ 149.4 billion in 2020 due to a significant increase in exports. The United States of America registered the largest trade deficit in creative goods. It increased from US\$ 51.1 billion in 2010 to US\$ 75.7 billion in 2020. Major movements between 2010 and 2020 include the Republic of Korea and Poland becoming significant net exporters of creative goods, while Hong Kong (China), Germany, and Saudi Arabia became major net importers. Developing economies are net exporters, while developed economies are net importers of creative goods. LDCs and SIDS are both net importers, but while trade balance improved in LDCs, it deteriorated in SIDS. Figure 19 shows the evolution of creative goods trade balances in selected countries and developing and developed economies in the past decade.

Figure 19

Creative goods trade balance in selected countries and by level of development, 2010 and 2020

(Trade balance as percentage of creative goods trade)



Source: UNCTAD based on UN COMTRADE Database.

2. International trade in creative services

Measuring creative services trade is more complex than trade in creative goods. This report uses an experimental data set⁵⁰ on international trade in creative services developed by UNCTAD. The data set uses UNCTAD-WTO annual data on trade in services based on all available official trade-in-services statistics. They are complemented with adjustments and estimates representing over 70 per cent of records, making the dataset “experimental.” The data set has some limitations,⁵¹ therefore the report only looks at creative services exports for countries and regions where data is available.

Trade in creative services is measured using Extended Balance of Payments Services Classification (EBOPS). UNCTAD considers ten EBOPS categories as creative services or services with a significant creative component (see the first two columns of table 8). However, it is not always simple for data compilers to distinguish between some services categories, like research and development (SJ1) and licenses to use the outcomes of research and development (SH2); or software sales (SI21) and the sales of the rights to use software (SH3). The same principle applies to audio-visual services. Therefore, UNCTAD regrouped these services categories to achieve more comparability among countries (see the third column of table 8). The six services groups include:

1. research and development;
2. software;
3. audio-visual;
4. information
5. advertising, market research, and architecture; and
6. cultural, recreational, and heritage services.

Table 8
List of creative services

EBOPS item	Name	UNCTAD regrouping
SH2	Licences for the use of outcomes of research and development	Research and development
SH3	Licences to reproduce and/or distribute computer software	Software
SH4	Licences to reproduce and/or distribute audio-visual and related products	Audio-visual
SI21	Computer services, software	Software
SI3	Information services	Information
SJ1	Research and development	Research and development
SJ22	Advertising, market research, and public opinion polling services	Advertising, market research, and architecture
SJ311	Architectural services	Advertising, market research, and architecture
SK1	Audio-visual and related services	Audio-visual
SK23	Other personal, cultural, and recreational services, heritage and recreational services	Cultural, recreational, and heritage services

Source: UNCTAD.

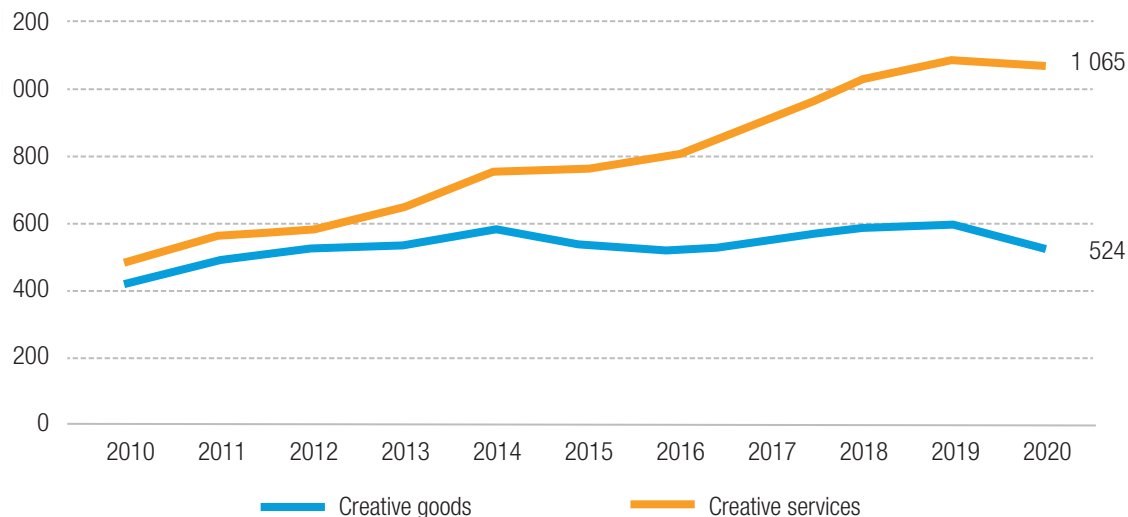
The main issue with creative services trade data is data availability, especially in developing countries, and the lack of necessary detail in the reported data. In addition, a lot of creative services international trade, such as performing arts often by small and informal entities, goes unreported in developing countries. When countries do not report at the required sub-category levels, it becomes difficult to estimate what proportion of the higher-level service was creative. As the 2018 Creative Economy Outlook noted, developed economies tend to have better reporting on creative services, although not all of them. Developing economies tend to have less detailed information (UNCTAD, 2018). As shown by South Africa's example in Chapter 2, the lack of data does not necessarily mean that certain developing economies do not have thriving creative services trade, but rather that they lack statistical capacities.

Trends in exports of creative services

Creative services make an increasingly significant contribution to international trade in services. They vastly exceed exports in creative goods (figure 20). Creative goods and services exports decoupled in the past few years, driven by a robust increase in the exports of software and research and development services and digitization of some creative goods. World exports of creative services increased from US\$ 487 billion in 2010 to almost US\$ 1.1 trillion in 2020. As shown in figure 21, Europe is the largest exporter of creative services (with the exports of creative services amounting to US\$ 564 billion in 2020), followed by Asia (US\$ 259 billion) and Northern America (US\$ 227 billion).

Figure 20
Global exports of creative goods and services, 2010–2020

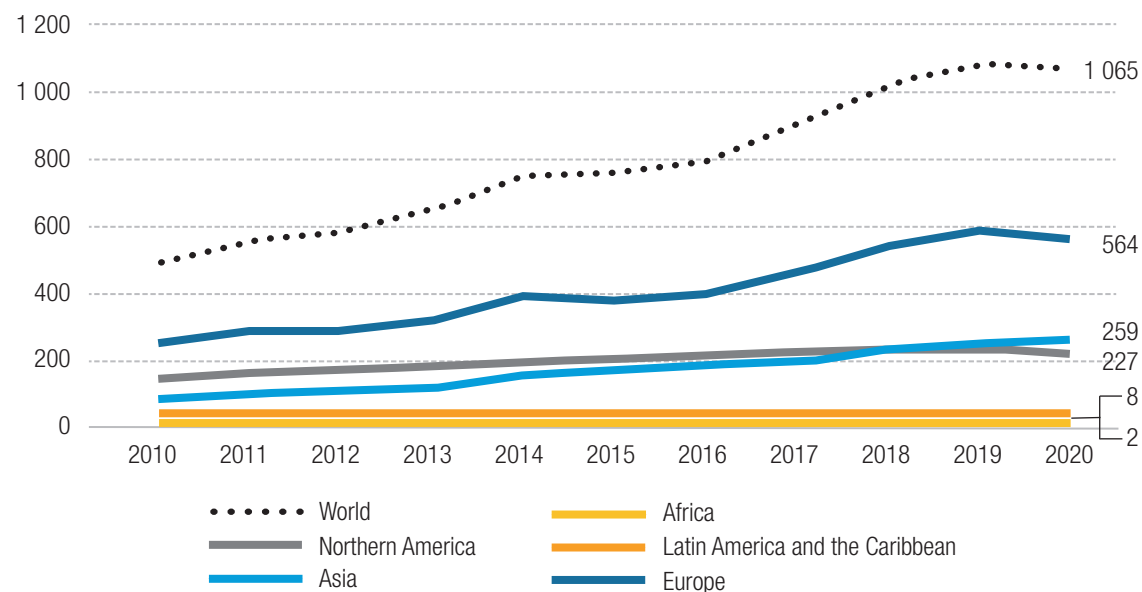
(US\$ billion)



Source: UNCTAD.

Figure 21
Exports of creative services by region, 2010–2020

(US\$ billion)



Source: UNCTAD.

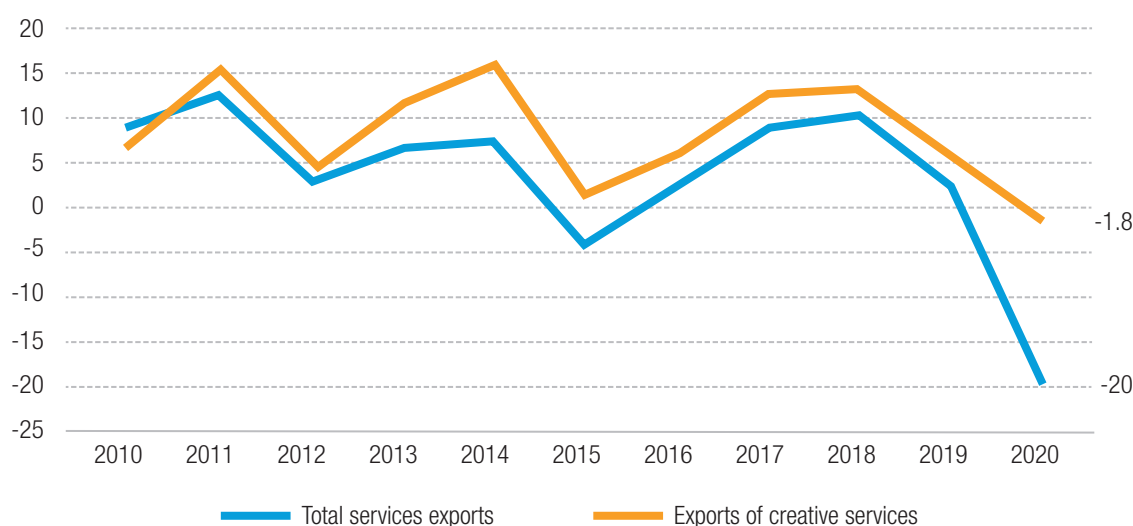
Note: Data for Africa are based on country estimates applying regional or global shares or growths. Data is not available for Oceania.

Creative services exports have been growing faster than total services over the last decade. One of the reasons why creative services grow higher than total services is an improved statistical capturing of the detailed services sub-categories in recent years. As shown in figure 22, the export growth rate of creative services follows the patterns of total services export growth, but creative services exports were more

resilient in 2020 during the COVID-19 pandemic. Exports of creative services were down by only 1.8 per cent in 2020, while exports of all services fell by 20 per cent (mainly driven by travel and transport services, which contracted by 62.5 and 20.3 per cent in 2020, respectively).

Figure 22

Annual export growth rate, total services exports vs exports of creative services, 2010–2020 (Percentage)

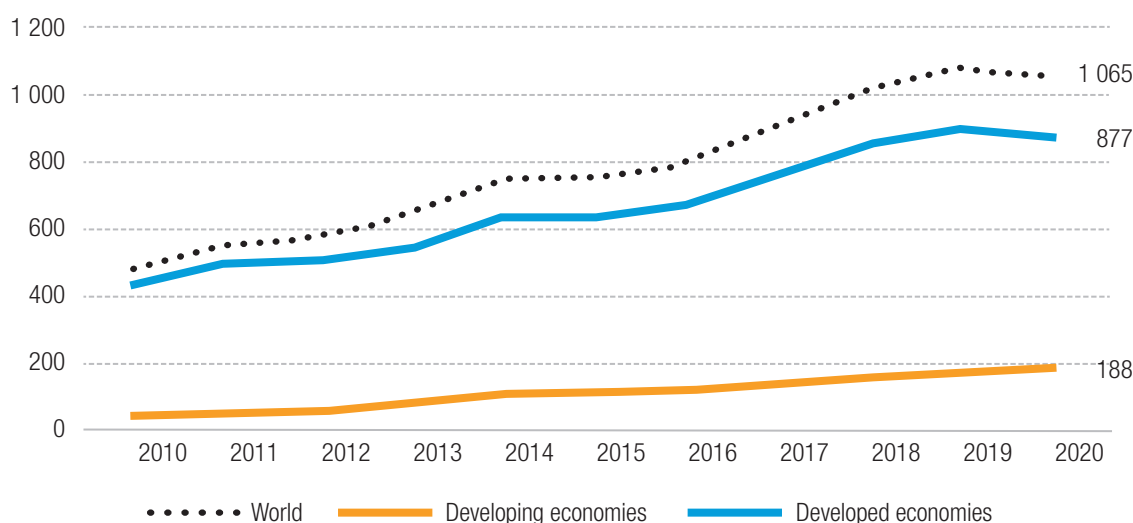


Source: UNCTAD.

Developed countries have been exporting significantly more creative services than developing economies (see figure 23), accounting for 82.3 per cent of all creative services exports in 2020. The gap between developed and developing countries has decreased over the past decade, albeit slowly. In 2010, developing countries accounted for 10.1 per cent of global creative services exports, a share that reached 17.7 per cent in 2020.

Figure 23

Exports of all creative services by developing and developed economies, 2010–2020 (US\$ billion)



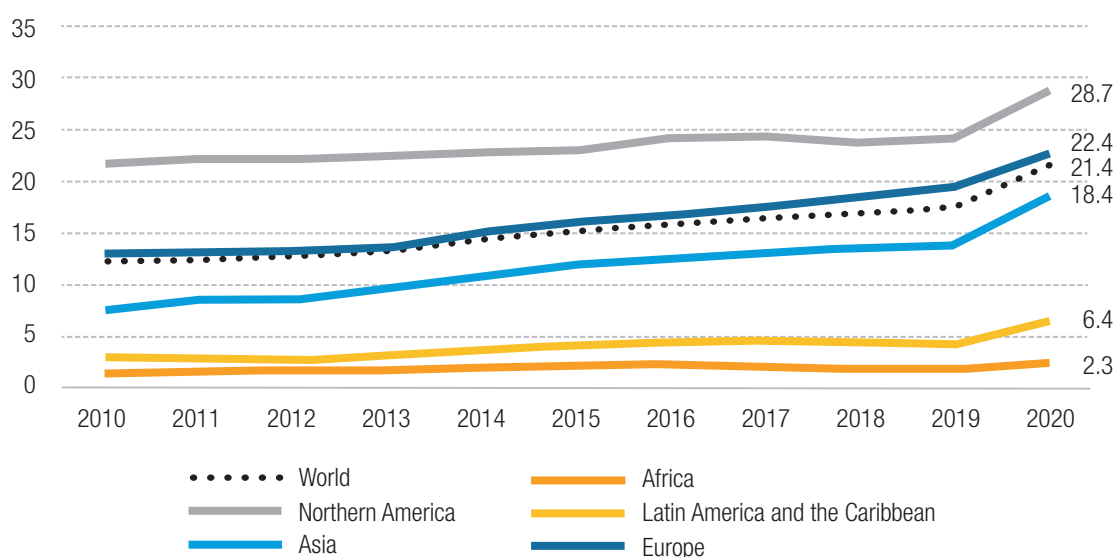
Source: UNCTAD.

The share of all creative services from total services exports increased from 12.3 per cent in 2010 to 17.4 per cent in 2019 (see figure 24). Due to a dramatic fall in global trade in travel services, the share of creative services further increased to 21.4 per cent in 2020. This may last if changed consumer behaviour and business operating habits caused by the COVID-19 pandemic stay permanent. There are significant regional differences. In Northern America, creative services represented a much higher export share: amounting to 23.9 per cent in 2019 and 28.7 per cent in 2020. In comparison, creative services exports in Africa represented 1.4 per cent of total exports in 2010, increasing to 2.3 per cent in 2020.

Figure 24

Share of creative services exports from total services exports by region, 2010–2020

(Percentage)



Source: UNCTAD.

Note: Data for Africa are based on country estimates applying regional or global shares or growths. Data is not available for Oceania.

Main exporters

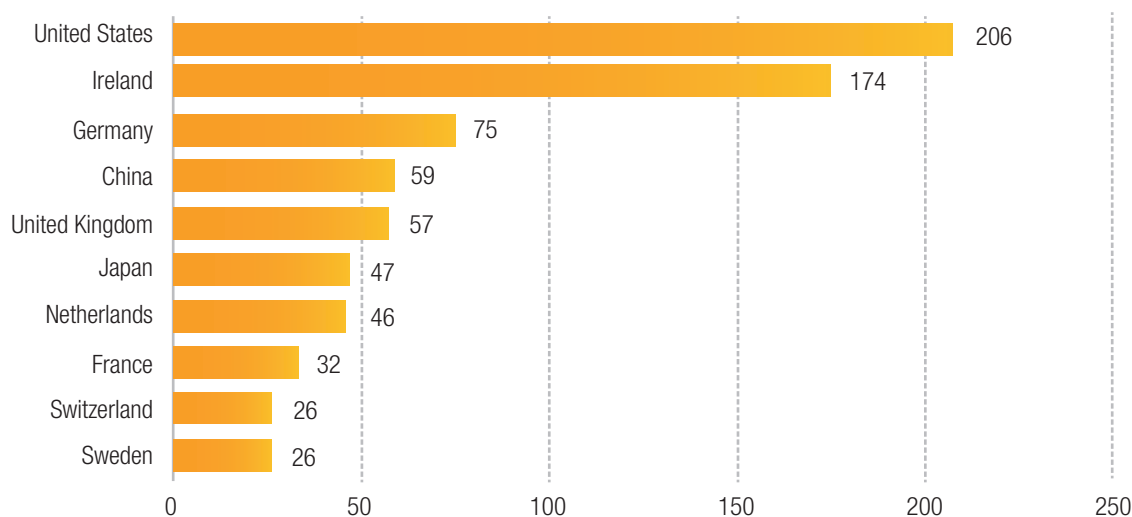
Creative services trade is a concentrated market, where ten countries account for more than two-thirds of global exports. In 2020, the United States of America and Ireland were by far the largest exporters of creative services with US\$ 206 billion and US\$ 174 billion, respectively. In Ireland, multinational companies strongly contribute to creative services exports, especially in computer services, as they report their global copyright and license income from here. The next largest creative services exporters are Germany (US\$ 75 billion), China (US\$ 59 billion), and the United Kingdom (US\$ 57 billion). The list of the world's ten leading exporters of creative services in 2020 counts 8 European countries, one from Asia, and one from Northern America (see figure 25). Altogether, the top ten exporters accounted for 70 per cent of global exports in creative services.

Tables 9 and 10 present the most significant developed and developing economy exporters of creative services in 2020, where data were available. It should be noted that several economies, especially developing economies (*i.e.*, Argentina, Brazil, Chile, India, Indonesia, Malaysia, Singapore, South Africa, Thailand, and Viet Nam), do not have adequate services trade data to calculate creative services exports. However, this does not mean they do not export creative services.

Figure 25

Top ten exporters of creative services worldwide, 2020

(US\$ billion)



Source: UNCTAD.

Table 9

Developed economies: top ten creative services exporters where data were available, 2020

	Developed economies	Exports of creative services (US\$ million)	Share from world exports of creative services (Percentage)	Share of creative services from country's total services exports (Percentage)
1	United States	205 922	19.3	29.2
2	Ireland	173 577	16.2	66.1
3	Germany	74 847	7.0	24.1
4	United Kingdom	56 813	5.3	16.6
5	Japan	47 008	4.4	29.3
6	Netherlands	45 736	4.3	24.5
7	France	32 495	3.0	13.2
8	Switzerland	26 316	2.5	22.9
9	Sweden	25 994	2.4	37.4
10	Israel	21 618	2.0	41.1
	Total	710 327	66.5	

Source: UNCTAD.

Table 10

Developing economies: top five creative services exporters where data were available, 2020

Developing economies	Exports of creative services (US\$ million)	Share from world exports of creative services (Percentage)	Share of creative services from country's total services exports (Percentage)
1 China	58 826	5.5	21.0
2 Taiwan Province of China	7 616	0.7	18.5
3 United Arab Emirates	5 942	0.6	9.6
4 Hong Kong SAR	1 930	0.2	3.0
5 Qatar	726	0.1	3.7
Total	75 040	7.0	

Source: UNCTAD.

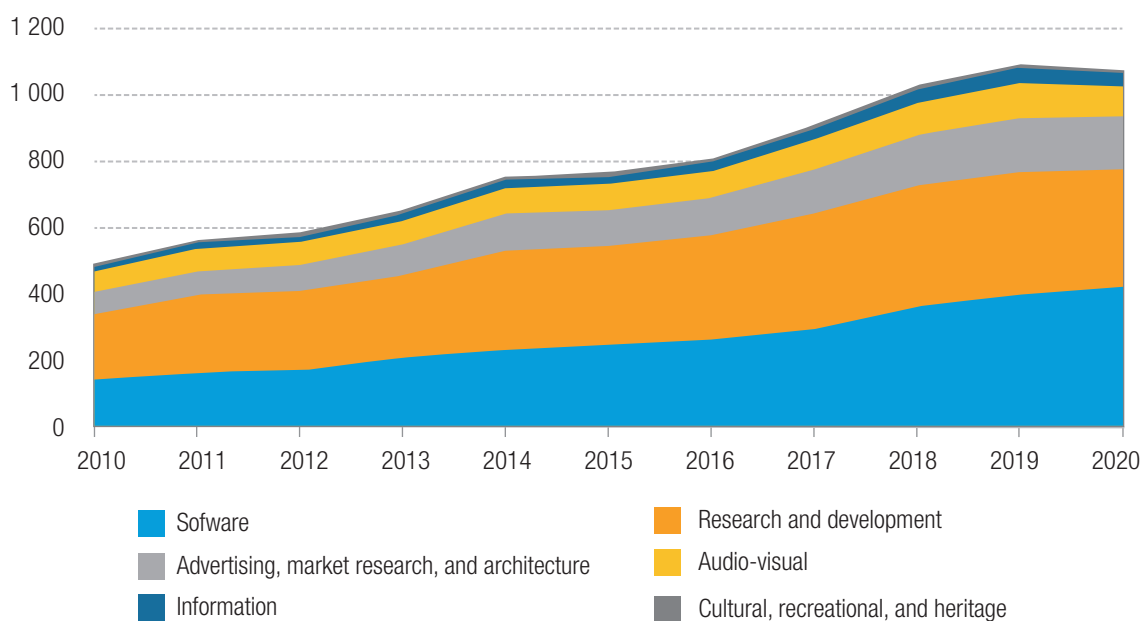
Main exported services

Figure 26 shows global creative services exports by product group for the period 2010–2020. Software services (accounting for 39.3 per cent of total creative services exports in 2020) and research and development (33.2 per cent) are the largest exported creative services. They are followed by advertising, market research, and architecture (14.8 per cent), audio-visual (8.6 per cent), information (3.5 per cent), and cultural, recreational, and heritage services (0.5 per cent).

Figure 26

World creative services exports by services categories, 2010–2020

(US\$ billion)



Source: UNCTAD.

All creative services categories experienced some losses in exports in 2020 during the COVID-19 pandemic, except software services (which registered an annual growth of 5.6 per cent). Advertising, market research, and architecture exports contracted by 2.7 per cent, followed by research and development (-4.7 per cent), cultural, recreational, and heritage services (-5.6 per cent), audio-visual services (-11.4 per cent), and information services (-16.5 per cent).

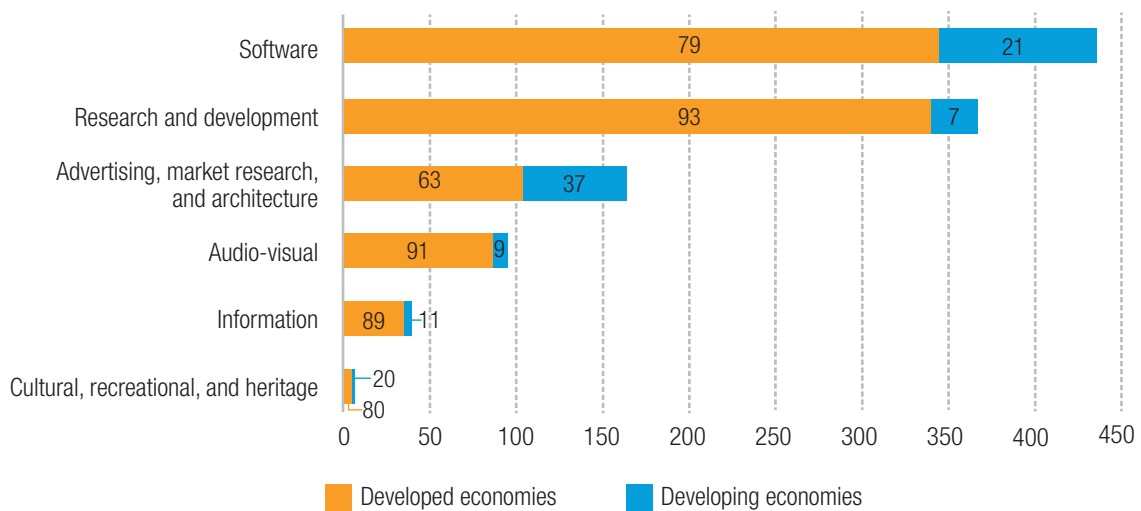
Developed countries largely dominate exports in all services categories and export different services categories compared to developing economies (see figure 27). For example, developed countries account for over 90 per cent of global exports of research and development and audio-visual services, involving significant export revenues from sales and licenses. Research and development are also paramount for innovation and developing new products.

Figure 28 compares the share of different services groups from total creative services exports in developing and developed economies. In developed economies, software services exports have gradually overtaken research and development services over the past decade. However, in developing economies, software services, advertising, market research, and architecture services exports have been dynamically increasing over the past decade. In 2020, software services accounted for 48 per cent and advertising, market research, and architecture services for 31 per cent of total creative exports by developing countries.

Figure 27

Total export of creative services by categories and level of development, 2020

(US\$ billion and percentage share)

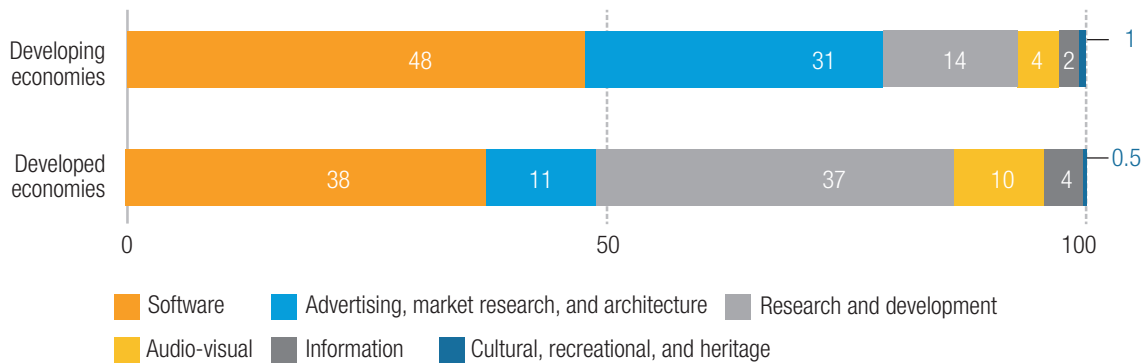


Source: UNCTAD.

Figure 28

Creative services exports by services categories and by level of development, 2020

(Percentage share)



Source: UNCTAD.

Barriers to trade in creative services⁵²

The value of global trade in creative services is almost twice as large as that of creative goods. The difference is likely to further increase due to globalization, increased digitization, and a growing market for creative services. Creative services represent an increasing share of global services exports and generate substantial export revenues. However, the largest exporters of creative services are mainly developed economies. This section examines the barriers to trade in creative services and their coverage in trade agreements.

The lack of fundamental skills and infrastructure can hinder developing countries from becoming competitive players in creative services. The world's most significant exporters of creative services, both developed and developing economies, score high in indicators that measure human capital, development, and skills. They also have the adequate digital infrastructure, as shown by the UNCTAD Business-to-consumer (B2C) E-commerce index (table 11).



Table 11
Human skills and e-commerce indicators in top creative services exporter economies

Economy	Share of creative services from country's total services exports (Percentage)	Skills		Infrastructure			
		World Bank Human Capital Index (Value, 2020)	Mean years of schooling (Years, 2019)	Share of individuals using the Internet (Percentage, 2019 or latest)	Share of individuals with an account* (Percentage, 2017)	UNCTAD B2C E-commerce index (Ranking, 2020)	UNCTAD B2C E-commerce index (Value, 2020)
Ireland	66.1	0.8	12.7	88	95	8	93.4
Israel	41.1	0.7	13.0	87	93	26	83.9
Sweden	37.4	0.8	12.5	98	100	15	90.8
Japan	29.3	0.8	12.9	85	98	20	88.7
United States	29.2	0.7	13.4	87	93	12	91
Netherlands	24.5	0.8	12.4	96	100	2	95.8
Germany	24.1	0.8	14.2	93	99	6	93.4
Switzerland	22.9	0.8	13.4	97	98	1	95.9
China	21.0	0.7	8.1	61	80	55	70.1
United Kingdom	16.6	0.8	13.2	96	96	5	93.6
France	13.2	0.8	11.5	89	94	17	90
United Arab Emirates	9.6	0.7	12.1	99	88	37	78.2
Qatar	3.7	0.6	9.7	100	66	50	72.1
Hong Kong SAR	3.0	0.8	12.3	92	95	10	91.8

Source: UNCTAD (2020), UNDP (2020), and World Bank (2020).

Note: Human Capital Index brings together measures of different dimensions of human capital: health and the quantity and quality of schooling. It captures the expected productivity of a child born today as a future worker, relative to a benchmark of complete education and full health (which gives the maximum value of 1). The UNCTAD B2C E-commerce Index measures an economy's preparedness to support online shopping. The index consists of four indicators that are highly related to online shopping and for which there is wide country coverage. Its maximum value is 100.

* Account ownership at a financial institution or with a mobile-money-service provider (percentage of population ages 15+).

Regarding international trade in services, research on the economic impact of services trade has underscored the positive impact of lower barriers to services on economy-wide productivity and the performance of services sectors. Services sectors facing lower trade costs tend to be more productive and have higher productivity growth than those with higher trade costs (Miroudot *et al.*, 2013). Services trade restrictions negatively affect performance in several important service sectors, as measured by comparable indicators across a broad range of countries (WTO, 2020b).

The WTO estimates that trade costs in services are almost double those in manufacturing (WTO, 2019). Trade costs compare costs of supplying services internationally versus domestically and are vital in determining the extent to which countries trade. Barriers to trade in services contribute significantly to trade costs and impact various policy areas. Analyses of services trade restrictiveness highlight those barriers to services trade are high, yet with significant variations across sectors, modes of supply, regions and levels of development. The OECD's Services Trade Restrictiveness Index (STRI) for 2021 indicates services sectors like broadcasting (0.316) are more restricted than the average of all industries (0.261), while motion picture (0.22), sound recording (0.203), and computer services (0.217) are relatively less restricted.⁵³ OECD research suggests that, on average, services trade costs would decline by 6–16 per cent in the medium term if countries were to close half of the gap with more open countries (OECD, 2022).

Multilateral obligations on services trade are relevant for the cross-border supply of creative services, including through new technologies, but also services provided through foreign-owned or -controlled establishments, the international movement of consumers, and the temporary presence of foreign natural persons. The World Trade Organization's (WTO) General Agreement on Trade in Services (GATS) covers, among others, trade in creative services.

The agreement contains general obligations, such as provisions on transparency and the obligation of most-favoured-nation treatment. WTO members also undertake specific commitments on market access and national treatment in their national schedules. Market access and national treatment do not apply unconditionally across all sectors, but only to the services sectors that each member has inscribed in its schedule of specific commitments, and only to the extent that no limitations have been listed for any of the four modes of supply.

WTO members have so far made limited use of the GATS to encourage the removal of trade restrictions or to guarantee existing levels of access. Since the Uruguay Round and its extended negotiations in telecommunications and financial services in 1997, specific commitments of WTO members did not improve due to negotiations. In that context, multilateral services commitments - including creative services - are, overall, modest.

Sectoral coverage varies significantly across the membership, with developed members and acceding members having, on average, more commitments than developing members, which in turn have more than least-developed countries. The level of commitments undertaken also varies considerably across sectors. For example, tourism services (132 out of 139 WTO members' schedules) and financial services sectors (111 out of 139) are among the most committed, with over three-quarters of WTO members having commitments in at least part of the sector.⁵⁴ In contrast, less than a third of members (40) made commitments on audio-visual services in their schedules. Computer services and research and development services have been committed in 82 and 51 schedules, respectively (see table 12).

Looking more specifically at selected services subsectors with links to the creative economy, table 12 highlights that commitments are relatively limited in, for example, architectural services (72), motion picture production services (38), radio and television services (18), sound recording services (18), or entertainment services (46).

Table 12

Number of country commitments in services linked to the creative economy

Services sectors with links to the creative economy	Number of country commitments
1.A.d Architectural services	72
1.B Computer and related services	82
1.C Research and development services	51
1.F.a Advertising services	59
2.D Audio-visual services	40
2.D.a Motion picture and video tape production and distribution services	38
2.D.b Motion picture projection service	26
2.D.c Radio and television services	18
2.D.d Radio and television transmission services	9
2.D.e Sound recording	18
2.D.f Other	6
10.A Entertainment services (including theatre, live bands and circus services)	46
10.C Libraries, archives, museums and other cultural services	22

Source: Input provided by WTO.

No guarantees of access and treatment are provided for uncommitted sectors, and any such trade restrictions may be imposed at any time, with implications for predictability and trade costs. However, many regional trade agreements have provisions for trade in services. Indeed, many of these preferential agreements tend to provide for market-opening commitments that go well beyond multilateral commitments on creative services. Despite the substantial increase in the number of services regional trade agreements (RTAs) since 2000 (now totalling 190⁶⁵), these agreements cover only part of all WTO members' trading relationships. Thus, access to the most important creative services markets for many developing countries remains governed by GATS commitments.





Chapter II

Measuring the creative economy

Creative industries are among the most dynamic sectors in the world economy. Measuring them can provide beneficial insights for governments and policymakers for planning and implementing policies targeting the creative economy and industries. Statistics about the creative economy can help understand the economic, social, and cultural contribution of creative industries and its contribution the SDGs. They can also help to identify important clusters in the creative economy that have the highest potential to lead to economic growth, increase export revenues, create job opportunities, and attract foreign and domestic investment. Considering these benefits, the chapter highlights different measurement frameworks for the creative economy, presents case studies about how developing countries are measuring their creative economies, and discusses measurement challenges and ways forward.

A. Measurement frameworks

UNESCO's focus is on cultural activities and the main reference material for the measurement of the cultural economy is the 2009 *UNESCO Framework for Cultural Statistics* (UNESCO, 2009). The framework provides the basic classifications and methodologies to measure the contribution of cultural activities to the economy in terms of GDP and gross value added; employment in cultural activities and cultural occupations; consumption and participation in culture; and international trade in creative goods and services. For the different dimensions several classifications are used:

- Cultural productive activities and goods and services are defined with the International Standard Industrial Classification (ISIC Rev.4) and Central Product Classification (CPC Version 2);
- Cultural occupations are defined with International Standard Classification of Occupations (ISCO 08) codes;
- Consumption and participation are defined using International Classification of Activities for Time-Use Statistics (ICATUS) codes;
- For the purpose of international trade in cultural goods, products are defined with the Harmonized System (HS 2007) and include 85 products at HS 6-digit level; and
- To measure international trade in cultural services, services are defined with the Extended Balance of Payments (EBOPS 2010) at 3- and 4-digit level.

WIPO focuses on copyright industries. The 2015 *Guide on Surveying the Economic Contribution of the Copyright-Based Industries* (WIPO, 2015) provides a list of copyright industries using ISIC (Rev.3.1 and Rev.4) and the Statistical Classification of Economic Activities in the European Community (NACE Rev.2).

In terms of measurement, UNCTAD focuses on international trade and compiles data on international trade in creative goods and services. UNCTAD's coverage is wider than UNESCO definitions. This is because for trade in goods UNCTAD also covers garment industry products (fashion), more design products, art crafts and new media products. For services, UNCTAD covers research and development services (especially licenses) and computer services – that are not covered by UNESCO. Products are defined with the HS 2012 classification, and they include 197 products at HS 6-digit level.

Many countries and regions have their own definitions of the cultural or creative economy (see OECD, 2022), and they follow to some extent the approaches of international organisations such as UNCTAD, UNESCO or WIPO. The European Union, for example, has its own *Guide to Eurostat culture statistics* (Eurostat, 2018). It looks at cultural employment; cultural enterprises; international trade in cultural goods and services; cultural participation; household expenditure on cultural goods and services; and public expenditure on culture. In some of these areas it follows UNESCO's methodology adapted to European statistical classifications.

There are patterns of common industries and products covered (*i.e.*, arts, audio-visuals, publishing, music, performing arts, photography), but also differences due to national or regional classifications; different

activity or product coverage and level of detail; different methodology and guidelines (*i.e.*, guidelines for cultural satellite accounts by the Andrés Bello Organization Agreement or Eurostat guide for the European Union); and different types of activities and products covered (*i.e.*, cultural and related, creative, auxiliary, interdependent). Differences may also be due to national priorities. Some countries, for example, also include gastronomy, while others decided to cover cultural education or the cultural production of households.

Regarding trade in creative goods and services, traditional trade classification systems have limitations when it comes to measuring goods with creativity as an important component. Due to different concepts about what is included in creative goods, the International Trade Centre, UNCTAD and UNESCO cover different sets of products in the CCIs. Trade classification systems based on the product's physical characteristics are not always useful for capturing cultural value or allowing for distinctions such as that between artisanal- and industry-produced craft. In addition, services trade data collection is complex and uneven across countries, with a lack of availability of both disaggregated and bilateral trade data especially in developing countries and LDCs.



Box 2 illustrates the diverse ways of how developing countries measure the economic contribution of their creative sector, based on official documents shared by countries during the second meeting of UNCTAD's Informal Working Group on Creative Economy in May 2022.

Box 2

Measuring the creative economy in developing countries: Argentina, Indonesia and Mexico

Argentina: Argentina measures the contribution of its creative economy through developing a culture satellite account. Cultural productive activities are defined with ISIC Rev3.1 and cover both creative and related activities in twelve main sectors such as performing arts and shows; visual and plastic arts; books and publications; audio-visuals; design; material heritage; cultural education; music; literary musical and theatrical creation; games and toys; digital content; and advertising. The culture satellite accounts allow for the estimation of employment in the creative sector defined by ISIC 4-digit creative industry categories and the estimation of consumption and participation in culture using CPC. To capture international trade in cultural goods, Argentina uses a regional product classification, the Nomenclador Común del Mercosur (NCM), to identify 447 products at NCM 8-digit level. The country distinguishes between cultural; related; auxiliary; and interdependent products. Trade in cultural services is captured through the Balance of Payments, but only personal, cultural and recreational services are identified as relevant for the cultural field (Instituto Nacional de Estadística y Censos, 2018).

Indonesia: Creative economy is an increasingly important sector for Indonesia. Based on the 2009 Indonesian Business Classification (KBLI) and ISIC, the country identified sixteen creative industries: architecture; interior design; visual communication design; product design; film, animation and video; photography; crafts; gastronomy; music; fashion; gaming; publishing; advertising; television and radio; performing arts; and fine arts. In addition, using HS 2012 codes, seven main product groups were identified as relevant to capture international trade in creative goods, including film, animation and video; crafts; gastronomy; music; fashion; publishing; and arts (Badan Pusat Statistik and Badan Ekonomi Kreatif, 2017).

Mexico: Similar to several Latin American economies, Mexico uses culture satellite accounts to estimate the economic dimensions of its creative sector. Its methodology is based on international statistical standards such as the 2008 System of National Accounts, *UNESCO's Framework for Cultural Statistics* and the *Culture Satellite Account Compilation Guide of the Andrés Bello Organization Agreement* (Andrés Bello Organization Agreement, 2020). It includes statistical tables with production accounts, income generation, supply and use, expenditure, jobs and people employed by gender, as well as non-monetary indicators. Cultural productive activities are defined with the Mexico's System of National Accounts (SNA) and the North American Industry Classification System (NAICS). The cultural satellite accounts cover 123 creative activities (78 creative and 45 related). The ten main activities include performing arts and shows; visual and plastic arts; crafts; design and creative services; books, impressions and press; audio-visual media; music and concerts; material and natural heritage; education and cultural diffusion in educational institutions; and cultural production of households. Mexico also estimates the number of creative jobs in these industries (Instituto Nacional de Estadística y Geografía, 2020). Mexico has a joint project with WIPO to measure the creative economy by using WIPO's methodology on the economic performance of copyright-based industries. The project identified 160 industries at NAICS 6-digit level. WIPO's first study on the economic contribution of copyright-based industries in Mexico was published in 2006 (WIPO, 2006).

Box 3 presents a case study about how South Africa carried out recently its third mapping exercise to capture the economic and social dimensions of its creative economy. South Africa's approach is based on UNCTAD and UNESCO concepts and methodologies, but it is adapted to the country's statistical system and available data. With the help of new data about the creative economy, South Africa was able to track the impact of COVID-19 on the sector and international trade in creative goods and services.

Box 3

Case study on South Africa’s mapping exercise to measure the creative economy

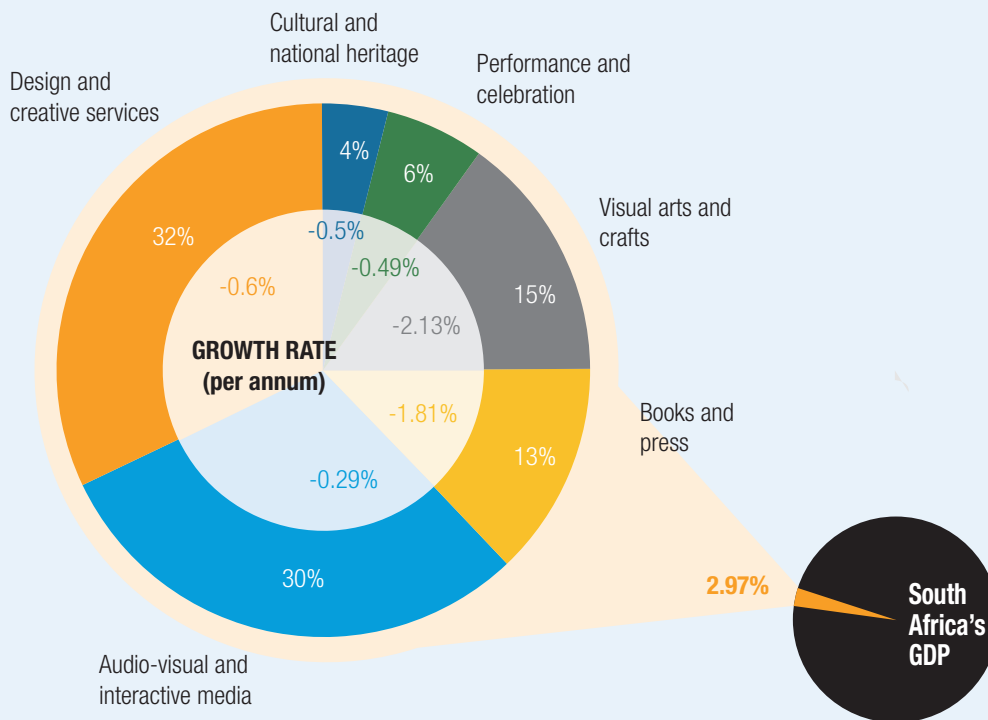
In addition to the social and cultural values that cultural and creative activities contribute to the identity and wellbeing of South Africans, the country has been increasingly recognising the contribution of CCIs to economic growth, employment, and international trade. The country founded the South African Cultural Observatory (SACO) as part of the “Mzansi’s Golden Economy” initiative, to produce reliable, policy-relevant data about the cultural and creative industries in South Africa.

In 2022, SACO released a mapping study of the South African creative economy, including the contribution of the sector to international trade. The study used UNESCO’s Framework for Cultural Statistics to identify cultural goods and services and the creative trident methodology to identify creative employment. Results showed that cultural and creative industries contributed to nearly 3 per cent of South Africa’s GDP (see figure 29) and provided employment for nearly a million people (6 per cent of all employment in South Africa).

Figure 29

Contribution of creative industries to South Africa’s GDP, 2020

(Percentage)



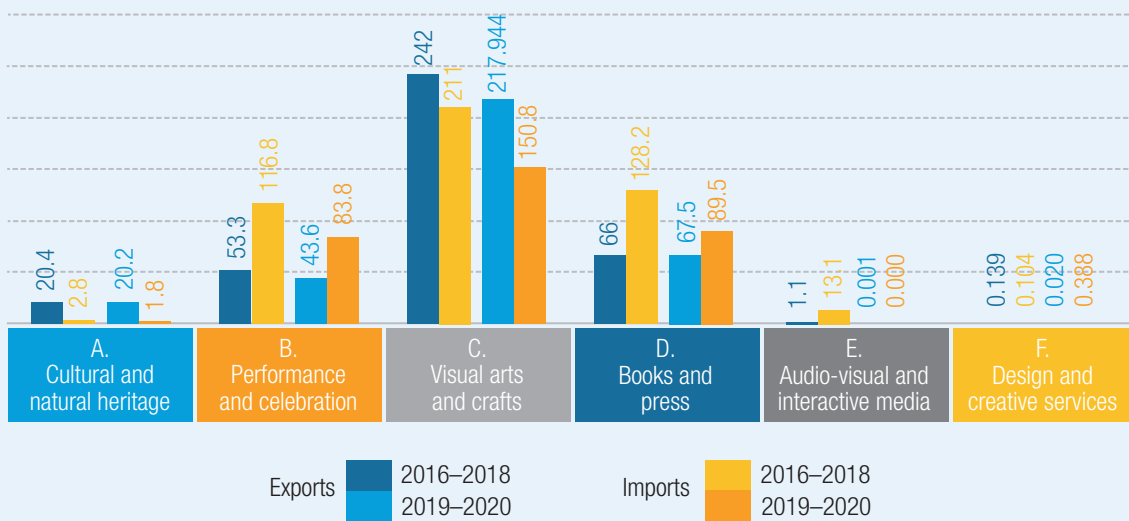
The mapping exercise also allowed for the estimation of creative trade. In 2020, South Africa’s cultural goods exports were worth US\$ 316.5 million, accounting for 0.37 per cent of the value of South Africa’s commodity exports. Until 2018, cultural goods exports had been growing strongly, amounting to US\$ 448.9 million, making up 0.47 per cent of South Africa’s total commodity exports in that year. The economic slow-down and the impact of COVID-19 had a negative impact on the sector’s contribution to GDP and cultural goods exports. Cultural goods trade contracted more sharply than total commodity trade on both the export and import side for 2018–2020. Like many small, open economies, South Africa had a cultural goods trade imbalance, with the value of cultural goods imports being more than the value of exports. However, cultural goods imports have been declining recently, and for the first time in twenty years, South Africa had a positive cultural goods trade balance for some quarters in 2020 and 2021.

Following UNESCO's methodology and product groups, 85 six-digit HS 2007 product codes were identified as part of cultural trade. Data for cultural goods trade is relatively complete, but many activities in the audio-visual, interactive media field, and design and creative services are increasingly captured in the services trade data. With dematerialisation affecting numerous cultural products, notably in music and film, but also certain categories of books and press, these domains tend to account for smaller and smaller proportions of cultural goods trade. As shown in figure 30, cultural domains E and F show almost no data for cultural goods trade, despite their making up more than 50 per cent of the contribution of the creative economy to South Africa's GDP.

Figure 30

Creative goods exports and imports of South Africa by product groups, 2016–2020

(US\$ million)



Data from the South African Reserve Bank can be obtained for some broad cultural services trade categories (such as charges for the use of intellectual property; telecommunications, computer and information services; personal, cultural and recreational services; and advertising and market research services). The UNCTAD-WTO trade in services data set also has data for South Africa's cultural trade, which include some relevant sub-categories (such as audio-visual and related services; and heritage and recreational services).

The mapping exercise showed that CCI services exports grew strongly in several domains, including audio-visual and related services until 2019. Since 2007, South Africa has run a surplus in this sub-sector, with exports growing more strongly than imports after 2009, and growth accelerating noticeably from 2014. The growing trade surplus in audio-visual and related services widened further between 2018 and 2019. Exports and imports both contracted during 2020, and the trade surplus decreased. The mapping exercise demonstrated that accurately tracking cultural services trade is likely to become increasingly important for the development of South Africa's cultural economy in the future.

Source: South African Cultural Observatory (2022).

A common feature in Argentina, Indonesia, Mexico, and South Africa is that national authorities (*i.e.*, national statistical office, cultural observatory) were the main actors in the measurement exercise. However, in some countries, non-state actors, such as academia, non-governmental organisations, or private institutions, have carried out similar mappings and assessments of the creative economy. One example is a recent study on Jordan's orange economy, prepared by a group of academics (Sandri and Alshyab, 2022). Another example is the *Otis College Report on the Creative Economy*, a publication series

since 2007 by the Otis College of Art and Design in Los Angeles, California. With support from the City of Los Angeles, this report looks at the local creative economy of eight regions in California (Otis College of Art and Design, 2021). In the lack of official data and statistics about the creative economy, these studies can provide valuable information for policymakers.

B. Moving forward: approaches and initiatives to measure the creative economy

There is no “right” or “wrong” model of creative industries, nor a “one-size-fits-all” approach to measuring a creative economy. However, countries must choose an approach that best fits their economy, as each country will have their own industries, goods and services that are a part of the creative sector. It is important for countries to understand the various industries with creative component that exist in their economy, then begin to compile and analyse data on these sectors.

In 2008, the United Kingdom-based Nesta innovation fund developed an approach to allow estimation of the numbers employed in the creative industries and in creative occupations outside the creative industries. The so called “creative trident methodology” (Higgs, Cunningham, and Bakhshi, 2008) focuses on employment, rather than production or trade data. The model offers policymakers several advantages over other approaches: it focuses on core creative added value; helps distinguish creative individuals working in other sectors and creative individuals and others who work in creative industries; it uses census data rather than sample surveys; and lastly it enables to determine the total personal earnings arising from creative employment.

In 2013, Nesta, with the United Kingdom’s Department for Culture, Media and Sport, published a report titled *A Dynamic Mapping of the UK’s Creative Industries* (Bakhshi *et al.*, 2013), which presented a new way of classifying the United Kingdom’s creative industries. This new approach focused on the creative intensities. This model measured the employment within the creative sectors as a proportion of total employment in the industry. The dynamic mapping approach, which is a three-stage process states that an industry with a high percentage of cultural or creative workers, can be considered a creative industry.

Countries interested in measuring their creative economy can adopt a general approach. Figure 31 presents a framework with the key steps. It includes setting objectives, bringing together relevant stakeholders, conceptualising and defining the scope of creative industries, identifying parameters to measure (*i.e.*, contribution to GDP and employment in the industries considered creative, exports of creative goods and services) and available data sources, data collection, analysis of the collected qualitative and quantitative information, and their evaluation.

Figure 31

General framework to measure a country’s creative economy



Source: UNCTAD.

The General Assembly resolution 74/198 stresses the importance of regular, reliable, and comparable data on the contribution of the creative economy to the achievement of the SDGs. However, difficulties in measuring the domestic production and international trade in creative products and services remain challenging for most developing countries. The lack of universal definitions and comparable statistics makes comparing statistics on the creative economy across countries difficult.

The traditional separation between goods and services may be inadequate when it comes to measuring trade in creative products. Creativity is an intangible quality, which may be embodied into a good or a service. This good or service can be consumed locally or exported. The measurement challenge is therefore to estimate the domestic and imported creative content of all products that are domestically produced and exported, rather than classifying the whole item as “creative” or “non-creative.” The current UNCTAD definition may not capture fully trade in goods with actual creative content and lead to an over-estimation of trade. Design goods, such as interior, fashion, jewellery, and toys, dominate trade in creative goods based on the current UNCTAD product composition. To analyse if creative goods exports mask low or high value-added products would require more nuanced definitions and disaggregated data.

Services trade, including creative services, is becoming too important not to be measured. Services can be means for structural transformation and competitive advantage. To monitor and manage servicification countries need to be able to measure services. Better and more disaggregated data is required to gain more insights into the role of services in economic transformation and their potential for developing economies for services-led diversification.

Lack of data is a critical problem especially in developing economies. They face several challenges in quantifying services. They often lack the appropriate statistical infrastructure, including business registers to compile data. They do not have the institutional arrangements to let data compilers access multiple potential data sources and lack financial resources, IT infrastructure, and trained experts. Even if data exists, processing, formatting, and publishing them regularly may be challenging. There is a need for more funding and capacity building to strengthen countries’ statistical capabilities (Peltola, 2022).

International organisations are gathering statistics on services trade using national data and estimates. The UNCTAD-WTO trade-in-services database serves as a basis for several of these efforts, together with the quarterly global trade in services nowcast. Other existing datasets include the International Monetary Fund (IMF) Balance of Payments statistics, OECD-WTO Balanced Trade in Services Statistics (BaTiS), and WTO trade in services data by mode of supply (TISMOS).

Moving forward, UNCTAD is currently active in two groups to facilitate further discussions on defining and measuring the creative economy. The two groups include the sub-group about clarification on cultural products resulting from creative industries within the Task Team on International Trade Statistics and the Informal Working Group on Creative Economy.

The Task Team on International Trade Statistics, facilitated by the United Nations Statistics Division, spearheads a joint research agenda on business and international trade statistics for the revision of trade-related statistical standards. UNESCO and UNCTAD are co-leading a sub-group for the clarification on cultural products resulting from creative industries. Working with UNIDO, WTO, and national experts the group works on issues such as clarifying the concepts of cultural and creative goods and services; delimiting cultural and creative goods for the purpose of trade statistics; rethinking the links between cultural and creative industries and goods; the impact of digitization on cultural and creative trade statistics; or the definition of handmade goods. The group will prepare a guidance note in 2022–2023, to be incorporated in the updated International Merchandise Trade Statistics Manual.

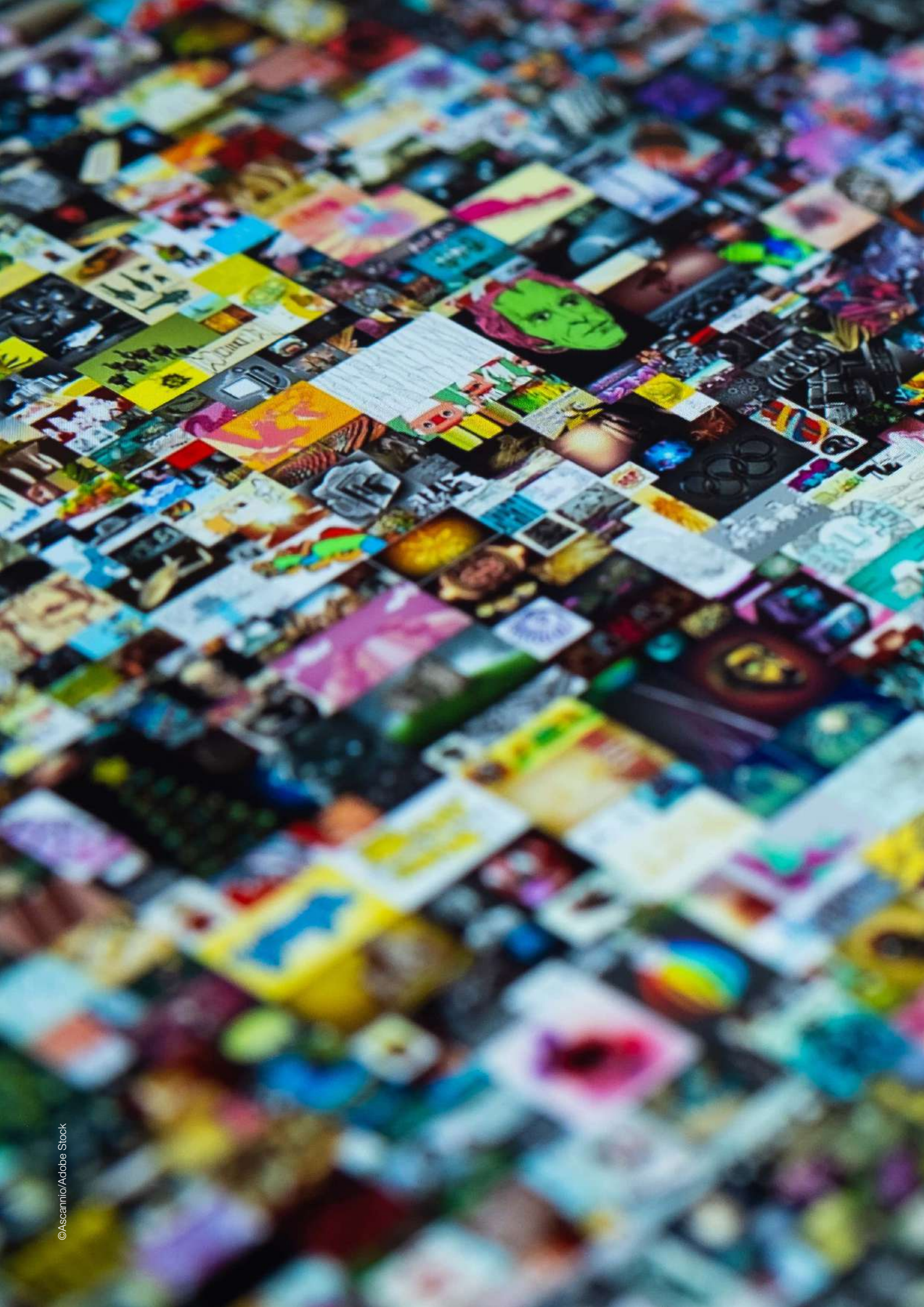
UNCTAD created an Informal Working Group on Creative Economy in April 2021. The working group brings together experts from developed and developing countries across the world to discuss evolving issues around the creative economy and the opportunities and challenges due to the changing economic, social and technological environment. The working group aims to review and potentially develop a new working definition of the creative economy and creative industries for UNCTAD. A synthesis report of the

group will be presented at an UNCTAD *Ad Hoc* Expert Meeting on Creative Economy and Sustainable Development in December 2022.

Both of these groups aim to encourage the dialogue between creative economy experts, statisticians and governments with the aim of increasing knowledge about the creative economy in developed and developing countries as well as about its measurement.

Regarding capacity building for better services trade statistics, the recent ninth session of UNCTAD's Multi-Year Expert Meeting (MYEM) on Trade, Services and Development in July 2022 proposed to create an informal working group of services data experts to discuss data needs and identify gaps and potential funding opportunities in support of developing countries. Experts would be those engaged in services data collection and analysis in government statistical agencies, international organizations, and academia. The outcomes of the group will feed into individual sessions of the MYEM which in turn reports to UNCTAD's Trade and Development Board (TDB) through the Trade and Development Commission.







Chapter III

Industry 4.0 and the creative economy

A. The digital transformation of the creative economy

New and emerging technologies have been transforming the creative economy. While it may be too soon to fully understand how these technologies will affect creative industries, this section briefly looks into some of the new and emerging technologies and their implications for the future of the creative economy.

The use of industry 4.0 technologies opens new opportunities for the creative economy. Three-dimensional (3D) printing, artificial intelligence, augmented reality and virtual reality (AR/VR), blockchain, cloud computing, drones, and the Internet of Things (IoT) are driving the fourth industrial revolution. They have created new avenues for the production, distribution and consumption of creative goods and services, whilst reaching a wider range of consumers, globally. Artificial intelligence, for example, is used to personalize music and film preferences by some online platforms. Additive manufacturing, or 3D printing, can be used to produce crafts. Augmented reality allows for fashion shows to feature apparently invisible models. Blockchain technology (*i.e.*, non-fungible tokens) can help certify originality and ownership of unique artworks. Virtual reality can promote an immersive experience in computer games and performing arts (UNCTAD, 2022b).

The COVID-19 pandemic accelerated the shift towards e-commerce and digital platforms and the scope for the transformation of the creative economy. In 2020, UNCTAD and NetComm Suisse eCommerce Association published a study on COVID-19 and e-commerce (UNCTAD and NetComm Suisse, 2020), with findings from a survey that examines how the pandemic has changed the way consumers use e-commerce and digital solutions. The survey focused on nine countries representing both developed and developing economies: Brazil, China, Germany, Italy, the Republic of Korea, Russian Federation, South Africa, Switzerland and Turkey. Increases in online shopping during COVID-19 differ between countries, with the strongest rise noted in China and Turkey and the weakest in Germany and Switzerland, where more people had already been engaging in e-commerce. According to the survey, changes in online activities are likely to outlast the COVID-19 pandemic. Respondents, especially those in China and Turkey, said they would continue shopping online and focusing on essential products in the future. Box 4 presents a case study about how companies in the textile industry of Armenia and Tajikistan embraced digitalization during the COVID-19 pandemic.

Box 4

Digitalization to improve the resilience of traditional textile sectors in the era of COVID-19⁵⁶

Amidst the COVID-19 pandemic, companies in textile-related sectors in **Armenia** and **Tajikistan** seized digital solutions to reorient their sales promotion activities to social media marketing tools, e-commerce and online business to business (B2B) platforms.

Using digital know-how and tools to pursue online channels allowed these companies to maintain business continuity by receiving production orders and acquiring new contracts with new partners both domestically and abroad. This included companies from the Armenian textile and garment industry and from the carpet-weaving, embroidery, and traditional textile sectors in Tajikistan.

The capacity to adopt this digital know-how and to pursue digital opportunities benefitted from the support from a UNIDO project to upgrade SMEs in creative industries.

Source: input from UNIDO.

Going forward, the questions arise with regard to how the COVID-19 pandemic will propel more consumers to change their shopping behaviours and patterns, the shift to online purchases, and whether governments will invest more in e-commerce and online-facilitating infrastructure and policies (WTO 2020a). Still, the International Data Corporation (IDC) forecasts that, due to the COVID-19 pandemic, 65 per cent of the world's GDP would be digitized by 2022.⁵⁷ According to UNESCO, people have tuned into more streaming services than ever before. In the first quarter of 2020, the subscription video on demand (SvoD) service,

Netflix, reported a 23 per cent increase while the Swedish music streaming platform, Spotify, reported a 31 per cent increase in new subscribers (UNESCO, 2021c). Music streaming now accounts for the majority of the revenue of the global music industry. Worldwide, online video subscriptions hit US\$ 1.1 billion in 2020, a 26 per cent rise from the previous year.⁵⁸

The impact of the digital revolution is present in developing countries as well. Digital revenues have increased steadily over the past few years, although with asymmetries among and within creative industries. Streaming services in some sectors, such as music, is now the dominant format globally. It accounted for 62.1 per cent of global recorded music revenues after increasing by 19.9 per cent in 2020.⁵⁹

Digital music streaming and gaming are growing in Africa. Throughout Africa, revenue from digital music streaming is expected to reach US\$ 500 million by 2025, up from only US\$ 100 million in 2017, according to a 2021 World Bank study of Africa's music industry.⁶⁰ Africa also has a growing gaming industry, with the number of gamers in sub-Saharan Africa rising to 186 million people in 2021, from 77 million in 2015.⁶¹ Africa's gaming industry is projected to grow by 12 per cent between 2020 and 2025, driven by AR/VR technology (UJAC-Andani, 2021). This growth calls for access to technology, training and industry maintenance, showing how Africa needs to improve digital capacities and increase skilled employment in this industry.

Drone technology has a significant impact on media production. The effects apply to advertising, broadcast and photojournalism, television and filmmaking. Within the South African creative industry, drone technology has improved significantly in the last five years since it was formally legalised in 2014. Drones have been used as a cost-effective option for aerial photography and cinematography. The increased use of drone technology across the continent will enable new strategies for their unique implementation on the continent in and outside the creative industries (UJAC-Andani, 2021).

Video streaming contributes to record growth in India's film industry. Bollywood, the Mumbai-based engine of India's film industry, is one of the most widely recognized examples of a creative sector claiming its place on the world economic stage. India is the world's largest producer of films and in 2020 the industry was valued at INR 183 billion (Indian rupees, about US\$ 2.5 billion). Although COVID-19 lockdowns have affected box-office returns, video streaming has contributed to record expansion.⁶² This growth may even outstrip growth in the Indian economy, one analysis found, predicting that "with an eager and growing workforce and multiplying diaspora overseas, creative content may edge its way up to be India's greatest export."⁶³ A similar trend can be observed, albeit at a much smaller scale, in Africa. The best-known example is Nigeria (*i.e.*, Nollywood), but Egypt is also a centre for producing Arabic-speaking television series and movies.

E-commerce can support the growth of handicrafts activities. A handicraft company in Nicaragua, called Nicahat, sells handmade, traditional hats made with "pita" fibre. With support from ITC, a project on linking Central American women business enterprises with the global gifts and home decoration market,⁶⁴ and the Association of producers and exporters of Nicaragua (APEN),⁶⁵ Nicahat became a thriving business. The Nicaraguan company gained knowledge on international export management, market research, creation of quality content and traffic generation for e-commerce. Sales from January to October 2020 exceeded sales for the same period of the previous year by 7 per cent (ITC 2022). The illustrates the potential of the digital economy to offer new opportunities for indigenous and local community entrepreneurs to actively promote and expand their businesses.

Creative hubs promote creativity, digitalization and knowledge sharing. The first Creative Hub in Ethiopia was launched in May 2021. The Creative Hub has been designed with the intent to foster innovation and economic development by promoting creativity, digitalization and knowledge sharing. The hub was funded by Italy and implemented by UNIDO in partnership with the Ministry of Industry and the Ethiopian Enterprise Development (EED). The hub has been fully equipped with cutting edge digital tools such as 3D printers, laser cutters, milling machines and a digital library. Since the launch, the Creative Hub has offered

more than 53 trainings, workshops and events for over 70 beneficiaries (60 per cent women) on different subjects as digital marketing, business skills (UNIDO, 2022).

More data and analyses are needed to evaluate the effects of the digital transformation of creative industries on economic diversification and upgrading. The challenges of measuring creative industries are compounded when it comes to assess the effects of digitalization on these creative industries. The hypothesis that the increasing levels of digitalization contribute to higher skill and technology intensiveness in creative industries, and to economic diversification calls for more data and information to be fully assessed. In any case, digitalization allows for more process and product innovation, which may increase value addition.

B. Opportunities and challenges of digital transformation

Streaming has become the major distribution channel for some creative activities. The Internet has made it possible to distribute creative work online, by creating innovative services such as streaming, online publishing, software, digital art and photography, and artificial intelligence. For instance, streaming platforms such as Spotify and Google's YouTube have become the main vehicles for music to reach people and the industry's principal revenue generator. Streaming currently accounts for 80 per cent of all the industry income.

Digital platforms have leverage and are able to capture much of the value. As streaming became widespread, more so since the COVID-19 pandemic, streaming platforms have come to control music distribution and revenue. Spotify and YouTube account for three-quarters of all streams globally. Together with dominant digital platforms such as Apple and Amazon, four companies dominate the market. This dominance gives platforms like Spotify the power to charge important fees to labels big and small for the right to reach audiences. Prior to streaming, a record label would get 70 per cent of every album sale, while the rest would pay all of the labour-intensive services required to make, distribute, and sell a record. With streaming, the distribution is similar only that the remaining 30 per cent goes entirely to streaming platforms like Spotify.⁶⁶ The levels of royalty payments to content producers are criticized as low by several major and independent artists (Marshall, 2015). Independent artists and small businesses face additional challenges in an industry dominated by a handful of streaming platforms on which content creators depend to distribute their artwork. The music industry including the digital streaming market is already very concentrated, thereby making the industry very inequitable *vis-à-vis* the artists. A competitive business environment in the industry, with reinforced competition law enforcement and tighter merger control, is needed to prevent further consolidation through anticompetitive mergers as well as anti-competitive practices.

The scope and application of intellectual property rights (IPRs) in the digital environment are unclear (Spennemann, 2019). IPRs protect creativity in original works. But the IPR system was designed for an analog environment. Digital reproductions, multiple sharing, and new business models like streaming represent a value in the digital domain but a challenge for copyright experts. In the music industry, for example, artists received royalty fees for each sold phonogram. However, in streaming platforms, royalties are not linked to downloads but a negotiated percentage of user subscription fees. Independent artists often find themselves with weak negotiating power against music labels or streaming platforms. New and emerging technologies raise other issues as well: can used e-books be re-sold? Are platforms liable for unauthorised uploaded content? Does data mining with artificial intelligence require copyright fees?

Piracy, especially digital piracy, is a significant issue. It prevents many creative workers, especially in developing countries, from earning rightful profits from creative industry copyrights. Because of piracy and the lack of efficient royalty collection mechanisms, developing countries miss out on individual payments and gains, taxable income, and public funds. But they also lose opportunities to construct a self-sustaining economy. Moreover, the primary industries of recording, production, and distribution are not the only

ones to suffer. Secondary industries of marketing and communications media, ancillary manufacturing of materials and merchandise, artists' agents, and specialist agencies also lose incomes or fail to develop.

Intellectual property rights need to rely on strong institutional frameworks. IPRs can generate economic value in sectors like tourism (through destination and nation branding), manufacturing (use of geographical indications, appellations of origin, and own-brand manufacturing), and information and communication technologies (ICTs) (e-commerce, media value, and data monetization). Intellectual property assets can also be used as collateral or security to finance the development of creative industries (Nurse, 2018). However, some developing countries do not possess strong legal and administrative mechanisms where the enforcement, collection, and distribution of royalties can take place systematically (Kabanda, 2014), especially in the digital environment. Creating an infrastructure of accessible production facilities and equitable distribution is a priority for development. Therefore, developing countries need to build awareness about IPR-related issues including issues of uncertainty in the jurisdiction for online infringements, the lack of amendments to modernize intellectual property laws in the digital environment and design IPR regimes for the digital context that align with the needs of their domestic creative sector.

Consumer demand for ethically made products from small producers around the world is growing, with challenges remaining. Producers from creative SMEs in developing countries can tap into that demand. New technologies, such as blockchain, offer convenient ways of certifying the origin and quality of products. However, challenges remain. Notably:

- **Limited access to online payment solutions:** International online payment solutions are available, but not always useful since the companies often cannot withdraw money from their online payment solution account to their bank account. The problem is that some international marketplaces force businesses to use international payment providers to receive payments at an international level. Often international payment providers do not allow the SMEs to receive funds in US\$ and their local currency and as such, this increases costs;
- **High logistics cost:** Most businesses cannot afford to ship with reliable international shipping providers that offer expedited shipping, including tracking and tracing. The international postal Express Mail Service may be an alternative. However, during the pandemic the postal services in many countries were not able to ship internationally. Consequently, the businesses had to use international shipping providers to serve international customers. The rates are usually calculated based on shipping volumes, which is difficult for small business that only ship a few items per month;
- **Lack of reliable information technology companies:** Businesses often outsource the website development to an information technology company and there is little knowledge on how to manage that relationship and the maintenance of the website, including cyber- and database security, so they lose control of or access to their websites and hosting accounts. Several companies experience this problem and sometimes they require help to negotiate with the IT companies to regain control. Increase in knowledge and awareness is therefore important to ensure that businesses are well prepared to build and manage their online shop;
- **Limited availability of regional and international marketplaces:** SMEs often must open a business in the United States of America with a local bank account to be able to access international e-commerce services. This is changing as regional marketplaces grow in many parts of the world, offering alternatives to small businesses that are locked out of larger international markets;
- **Poor connectivity in rural areas:** Some businesses must travel to the next town to access the Internet and connect to online services necessary to conduct their business operations (whether it is predominantly offline or online). More needs to be done to ensure all have affordable access;
- **Lack of skills related to market research, marketing and branding, website and marketplace design, logistics, payments, digital marketing, customer service, etc:** Significant training is necessary to support SMEs with their digital transition. It is a big shift in how to conduct their business and not all SMEs understand the potential. It is often time consuming and requires individual coaching.

Global digital divides persist with repercussions on the creative economy. The International Telecommunication Union estimates that as of the end of 2021, over a third of the world's population, 2.9 billion people, do not use the Internet.⁶⁷ The majority of them are women and girls.⁶⁸ Many of them live in least developed countries (LDCs), landlocked developing countries (LLDCs), and small island developing states (SIDS). In addition, only 39 per cent of rural households have access to the Internet. This gap particularly affects the creative economy's ability to be truly inclusive, especially for developing countries, least developed countries, and small island developing States, that still need to benefit from the digital dimension of the creative economy.

C. Harnessing the potential of new and emerging technologies

Several policy areas have to be involved to develop creative economies through new and emerging technologies. The recent UNCTAD report called *Creative Industry 4.0* (UNCTAD, 2022b) provides recommendations for developing countries to harness new and emerging technologies to develop their creative economies. The recommendations focus on three broad areas: developing human capacities, creating an enabling environment, and overcoming infrastructure barriers to digitalization.

Human skills are a key element to pursue digital transformation of the creative economy. Developing human capacities requires investment in the education system, including schools, universities, colleges, and training providers, who can provide people with the right mix of skills. Digital competencies are essential, but generic and complementary skills, such as literacy and numerical skills, skills in design, marketing, and entrepreneurship, are also needed for most professions in digitalized creative industries. A specific characteristic of the creative sector is that some artists and craftspeople may have negative attitudes towards business, marketing concepts, or new technologies. Policies can create places such as fabrication laboratories (or fab labs) for artists and designers to test and experiment with new technologies (UNCTAD, 2022b). With the rise of e-commerce, skills to participate in digital trade are essential for creative professionals and MSMEs. Education policies must be accessible and inclusive to all (UNCTAD, 2021b), including women, people with disabilities, and different age groups. Life-long learning is becoming an essential tool.

New and emerging technologies may become an important part of the future “business as usual” in creative economy. By then, digital capacities may not be reserved to experts but to be expected from all, underscoring the importance of inclusive policies to develop digital skills.

Creating an enabling environment involves several policy dimensions. An enabling environment may include giving the private sector fiscal incentives and creating funding programmes to support research and development in creative industries. Some high-risk segment content sectors may need government support to have better access to capital. Other creative activities may be considered commercially non-viable public goods that need non-commercial public support to exist. An appropriate competition policy and adequate competition law enforcement is also needed to build an enabling environment.⁶⁹ It is important to strike the right balance between intellectual property protection on the one hand, and prevention of abuse of IPR on the other. Appropriate competition and intellectual property policy are key to preventing abuse of IPR and maintaining open and competitive markets in the creative economy, which could facilitate and not deter entry by new firms.

Governments must also consider fostering e-commerce and better protecting consumers and small businesses in digital markets by adopting appropriate regulatory and legislative frameworks for e-commerce, consumer protection, data protection and privacy, e-payments, and cybersecurity (UNCTAD, 2021c). There are various international programmes to assist developing economies in fostering e-commerce. For example, UNCTAD's eTrade Readiness Assessments provide a snapshot of the e-commerce ecosystem in developing countries and support them in benefiting from digital transformation.

Overcoming infrastructure barriers to digitalization is crucial. This is particularly important because digital technologies are paramount in accessing markets. Universal and affordable access to the Internet is the first step, even if providing connectivity to crafts sectors in rural areas is a challenge. However, connectivity alone is not sufficient. Other infrastructures such as access to financial services, postal services, and transport networks are also required (UNCTAD, 2022b). Synergies can be pursued as digitalization can also facilitate access to several infrastructure services. This is the case of the potential for digital financial services to improve financial inclusion through improved coverage and efficiency (UNCTAD, 2021d).

Some governments have facilitated access to digital infrastructure services to encourage online shopping as an alternative to physical shopping during the COVID-19 pandemic. Several telecommunications providers have made available data services for minimal or no costs. In Ghana, Kenya, Rwanda and Uganda, central banks have temporarily permitted companies and banks to lower or scrap transaction costs and fees on digital payments and mobile money transfers to encourage the use of mobile money in preference to cash. Governments, like the Russian Federation and the United Arab Emirates, have encouraged the use of mobile payments but are yet to formally unveil specific regulations (WTO 2020a). Overcoming infrastructure barriers to digitalization will contribute to harness the potential of new and emerging technologies for the creative economy.





Special section on the International Year of Creative Economy
for Sustainable Development, 2021

Chapter IV

In December 2019, the United Nations General Assembly adopted resolution 74/198 on the International Year of Creative Economy for Sustainable Development, 2021. The resolution “requests the secretariat of UNCTAD and in consultation with UNESCO and relevant entities of the United Nations system, to inform the General Assembly at its seventy-seventh session of the implementation of the present resolution, through a dedicated section of the Creative Economy Outlook, elaborating in particular on how the resolution is aligned with and advances the 2030 Agenda”.

In addition, the resolution:

- recognizes that the creative economy, known as the “orange economy” in a number of countries, involves, inter alia, knowledge-based economic activities and the interplay between human creativity and ideas, knowledge, and technology, as well as cultural values or artistic, cultural heritage and other individual or collective creative expressions;
- acknowledges that creative industries can help to foster positive externalities while preserving and promoting cultural heritages and diversity, as well as enhance developing countries’ participation in and benefit from new and dynamic growth opportunities in world trade; and
- emphasises the resilient growth in international trade in creative industries, including the trade of creative goods and services, and its contribution to the global economy, and recognizing the economic and cultural values of the creative economy.

The next sections highlight how UNCTAD and other United Nations agencies, civil society organisations, countries, and other stakeholders implemented the resolution.

A. Contribution of United Nations entities

United Nations Conference on Trade and Development

The launch of the International Year of the Creative Economy (IYoCE) attracted over 7,000 people to the Creative Economy Webpage,⁷⁰ making it the most visited page in UNCTAD in January 2021. UNCTAD co-hosted or participated in 44 different events worldwide with a large number of participants. For example, 450 people attended the official launch of the IYoCE in January 2021 and 780 the Opening of the Creative Economy Forum of the fifteenth session of the United Nations Conference on Trade and Development (UNCTAD 15).

The importance and relevance of UNCTAD’s work on creative economy was reflected by the involvement of high-level government officials during the implementation of the IYoCE. Development partners also expressed their interest in the work of UNCTAD. The work of UNCTAD attracted lots of interest in the media (for example, over the year, UNCTAD’s work on the creative economy was mentioned in at least 133 different news articles and on multiple social media channels).

The timeline of events which is featured in Annex 1 allowed UNCTAD in cooperation with other United Nations agencies, to implement the resolution by:

- raising awareness about the creative economy;
- promoting cooperation and networking;
- encouraging the sharing of best practices; and
- promoting an enabling environment for all stakeholders in the creative economy.

One of UNCTAD’s key events was the Creative Economy and Digitalization Forum, organised with the Government of Barbados as a lead-up to UNCTAD 15. The Bridgetown Accord⁷¹ adopted by the forum, highlights “the inequality at the root of the cultural, creative and technological systems of the world and

the need to identify more inclusive ways of industrializing creativity, technology and innovation for a more equitable future.”

UNCTAD continues to provide a platform for the promotion of the creative economy as a tool for economic diversification and sustainable, equitable and inclusive livelihoods. UNCTAD is engaging in different forums related to the creative economy, including:

- [UNCTAD's Informal Working Group on Creative Economy](#), which was formed in 2021. This allows experts to discuss the opportunities and challenges associated with the evolving creative economy. The working group also aims to formulate a new working definition/taxonomy of the creative economy and creative industries for UNCTAD;
- [A sub-group on the clarification on cultural products resulting from creative industries](#) within the Task Team on International Trade Statistics of the United Nations Statistics Division (UNSD). UNCTAD and UNESCO are the leading agencies in this exercise. The work will allow United Nations agencies to continue working together in clarifying statistical needs and definitions. UNCTAD will rely on the *ad hoc* group to make sure the needs of all countries are considered; and
- UNCTAD has also developed and conducted a [global survey on the creative economy and creative industries](#) in 2021. This survey is expected to be carried out periodically and focuses on national institutional arrangements related to the creative economy, measurement issues, and national strategies and policies.

Civil society organizations communicated to UNCTAD about 82 events⁷² held during the International Year of Creative Economy in 2021. The focus of the all-year campaign went beyond the traditional cultural economy to also include sciences and industrial production. This new focus allows policymakers to expand the range of creative economy-related policies, which requires more horizontal types of inter-ministerial interventions in education and the promotion of public-private research and development partnerships. In addition, it involves specific support measures that governments may provide to various forms of artistic or cultural expression.

Working with partners, the “Friends of Creative Economy,” in the context of the World Conference of Creative economy has had positive impact on research, capacity building projects and consensus building. Examples of this are the recently published UNCTAD report called *Creative Industries 4.0*, the UNCTAD training courses on tourism and creative industries and the on-going preparatory work related to the upcoming World Conference on Creative Economy in Bali, Indonesia 2022.⁷³

United Nations Educational, Scientific and Cultural Organization

UNESCO's actions for the celebration of the 2021 International Year of Creative Economy for Sustainable Development involved a multitude of events. For example, the Abu Dhabi Summit 2021,⁷⁴ explored challenges and ways to develop a resilient, and collaborative creative ecosystem. It aimed to raise awareness of the importance of the creative economy for building sustainable and people-centred societies. UNESCO also raised awareness on the current state of the creative industries amidst the COVID-19 crisis by launching the ResiliArt Movement⁷⁵ in 2020. This has resulted in more than 300 virtual debates in over 115 countries. It led to a global discussion with key industry professionals on the experience of artists in the field.

UNESCO funded various projects globally via the International Fund for Cultural Diversity,⁷⁶ a funding mechanism of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. This encouraged creating resilient cultural and creative sectors through CCI policy development, capacity-building, and strengthening of organizational structures. Projects were carried out in several countries such as Argentina,⁷⁷ Cambodia,⁷⁸ Ecuador,⁷⁹ Ethiopia,⁸⁰ Georgia,⁸¹ Honduras,⁸²

Jamaica,⁸³ Mexico,⁸⁴ Mozambique,⁸⁵ Serbia,⁸⁶ South Africa,⁸⁷ United Republic of Tanzania,⁸⁸ Turkey,⁸⁹ and Viet Nam.⁹⁰

The UNESCO Roadmap on the occasion of the International Year of Creative Economy for Sustainable Development (UNESCO, 2021d) calls attention to the importance of investing in creativity. It also calls for action for countries to review the status of artists and cultural professions; provide an enabling environment for sustainable growth patterns; and adapt cultural policies to the challenges and opportunities of the digital transformation.

United Nations Industrial Development Organization

During 2021, UNIDO partook in 4 major events for the creative economy. It facilitated a wide scope of technical assistant projects to support SMEs and collaborated with various international organizations with a focus on digital innovation and partnerships.

UNIDO's side event for the 19th Session of the UNIDO General Conference,⁹¹ allowed international experts from Armenia, Lebanon, Tajikistan, and Tunisia to discuss how artisanal expertise and cultural heritage can become drivers of social change and improve livelihoods of vulnerable social groups and rural communities through new employment and entrepreneurial opportunities.

UNIDO's partnerships with international organizations raised awareness of the issues with the creative sectors and looked at the development of digital innovation. Together with UNCTAD and Sound Diplomacy, UNIDO held a dialogue called Create, innovate, recover: digitalizing creative industries for a sustainable recovery in Africa.⁹² The event explored the importance of innovation and digital transformation in the creative sector. The dialogue focused on how international and local partners can contribute to the recovery from the Covid-19 crisis and the achieving the SDGs, with various case studies from East and Western Africa. The dialogue showcased how the European Union, UNIDO, UNCTAD and other partners are supporting the recovery of creative and cultural industries.

UNIDO also partnered with the European Brand Institute (EBI), for the 17th Brand Global Summit,⁹³ highlighting brands' role as major game-changers in boosting the post-pandemic economic recovery, while also unleashing creativity and innovation in digitalization. The summit brought together leading branding experts and high-level representatives from governments, the private sector, academia, and international organizations, who exchanged experiences on applying brand management as a multidimensional-impact tool for improving business performance and resilience.

World Intellectual Property Organization

WIPO organised 12 major events to promote the creative economy in 2021. The activities helped WIPO to form partnerships, collaborate with the private and public sectors, and facilitate capacity building activities, which aimed at raising awareness on copyright and intellectual property among creative communities, government policy makers, the business community, and civil society.

It launched WIPO for Creators,⁹⁴ a public-private-partnership with the Music Rights Awareness Foundation, creative industry stakeholders, and partners from the public and private sector, to raise awareness about creators' rights and related processes. WIPO also organized bi-weekly webinars with member States and creative industry stakeholders on strengthening legal and licensing frameworks in support of effective and efficient copyright and related rights management.

WIPO also facilitated various meetings on creative industries with member States of the African Regional Intellectual Property Organization (ARIPO), Antigua and Barbuda, Kazakhstan, Kyrgyzstan, Poland, the Philippines and Trinidad and Tobago. The meetings focused on conceptual issues, the role of intellectual property, capacity building for trainers on intellectual property, data collection and analysis, and specific creative sectors, such as the audio-visual sector, book publishing, mobile applications, music, and video games.

WIPO's technical cooperation activities focused on improving legislative frameworks and copyright infrastructure and raising awareness on copyright and intellectual property among creative communities, policy makers, the business community and civil society.

B. Contribution of countries

The following case studies present how some countries promoted their creative economy during the International Year of Creative Economy with various events, campaigns, dialogues, and knowledge sharing.

Box 5

Slovenia and the International Year of Creative Economy

Slovenia has traditionally advocated for an increased importance of culture and creativity in foreign relations, particularly in international peace and sustainable development. It has been underlining this aspect of culture and creativity in political dialogue, concrete cultural projects and communication campaigns.

Slovenia's "Creativity4Sustainability" video campaign was launched in partnership with UNCTAD during the 2021 International Year of Creative Economy for Sustainable Development. The goal was to raise public awareness on the cross-cutting contribution of culture and creativity to SDGs. UN World Bee Day also highlighted how artists use their creativity to bring solutions to the construction of honeycombs as well as the promotion of urban pollination.

In September 2021, during the Slovenian Presidency to the Council of the European Union, the Future Unlocked! Conference was held in Ljubljana, which focused on the culture and creativity as agents of change, with particular focus on their contribution to the economic growth and their role as drivers of peace and stability. Together with the European Creative Business Network, Slovenia brought in an impressive amount of knowledge, networking, and guidance through the European Creative Industries Summit 2021.

While the networking, workshops, knowledge sharing and co-creating solutions prove to be beneficial for young creatives, experience also shows that positive and enabling political practices need to be shared among policy makers in the regions. Policy makers must do more to build enabling and supporting environments for the cultural and creative sector to bring its positive impact on peace, stability, and sustainable development to the best of its potential. In collaboration with its partners, Slovenia will continue to follow this path.

Source: Input from the Government of Slovenia.



Box 6**Indonesia and the International Year of Creative Economy**

Indonesia attaches a high importance to developing and promoting an inclusive creative economy. It integrates creative economy into medium and long-term development plans at both national and local levels. Such integration enables a more effective and holistic policy to develop and advance the creative economy.

Throughout 2021, the country carried out various activities at national, bilateral, regional, and multilateral levels, collaborating with institutions and actors from various backgrounds. At the national level, several important policies were put in place to assist the creative sector during the pandemic with financial stimulus, business matching, intellectual property registration, credit relaxation and restructuring, low-interest-rate working capital loans, and MSMEs credit guarantee scheme.

At the international level, Indonesia organized many activities to highlight the importance of creative economy for achieving the SDGs, and promote Indonesian creative products and services. Through its embassies, Indonesia organized 138 events in 57 cities of 38 countries related to the promotion of creative economy, such as business matchmaking, cooperation on capacity building and facilitating business dialogue between start-ups and venture capital.

To promote creative economy in the Southeast Asia region, Indonesia organized the Association of Southeast Asian Nations (ASEAN) Creative Economy Business Forum (ACEBF) in November 2021.

Indonesia encourages creative economy stakeholders to conduct activities that can have positive impacts on the creative economy sector, such the Tourism Working Group and discussion on the scope of “Innovation, Digitalization, and Creative Economy” in the Group of Twenty (G20). Indonesia will host the World Conference on Creative Economy (WCCE) in Bali in October 2022, with the theme of “Inclusively Creative: A Global Recovery.”

Source: Input from the Government of Indonesia.

Box 7**Least developed countries and the International Year of Creative Economy**

The Doha Programme of Action for Least Developed Countries,⁹⁵ during its plenary meeting held in December 2021, specified several areas of work regarding creative industries, including:

- leverage the opportunities offered by the 226 million young people in LDCs through productive capacity development in cultural and creative industries and services sectors;
- design and implement policies and measures supporting the outward and inward mobility of artists and cultural professionals from and to LDCs, including South-South mobility, as a key enabler for vibrant and dynamic cultural and creative industries; and
- protect and promote the status of artists and cultural professionals, and encourage artists’ inclusion in the digital ecosystem, including through appropriate intellectual property frameworks.

Efforts to promote dialogue and inclusion within the creative industries have already begun within LDCs. For example, the second edition of The Biennale of Luanda – “Pan-African Forum for the Culture of Peace”⁹⁶ was held in December 2021. This is a joint initiative of UNESCO, the African Union and the Government of Angola in partnership with UNCTAD. The initiative aims to promote the prevention of violence and the resolution of conflicts by encouraging cultural exchanges in Africa and dialogue between generations. As a space for reflection and dissemination of artistic works, ideas and best practices related to the culture of peace, it brings together representatives of governments, civil society, the artistic and scientific community, and international organizations.

Source: UNCTAD.

Chapter V

Main findings and recommendations

The creative economy can build more inclusive, connected, and collaborative societies. It can help diversify production, build competitive advantage, attract investment, stimulate entrepreneurship and innovation, support the growing sector of services, and promote cultural diversity and well-being. The 2021 International Year of Creative Economy accentuated the critical role of creativity in overcoming global challenges. In the meantime, the COVID-19 pandemic severely impacted some creative industries and highlighted their vulnerabilities.

General Assembly resolution 74/198 requested UNCTAD to provide recommendations to help countries and the United Nations system accelerate their efforts in implementing the 2030 Agenda through the creative economy. The following main findings and recommendations emerge from the report.

The concept and definition of the creative economy are diverse, representing countries' cultural diversity, but also due to different economic structures, statistical methodologies, and classification used.

Each concept has a particular rationale, depending on underlying assumptions about creative industries' purpose and mode of operation. They often lead to a different basis for categorization into "core" and "peripheral" industries within the creative economy. While no one definition fits all countries' needs, existing frameworks and classifications can help countries conceptualise their creative economy and industries in a more harmonized way.

Considerations for countries who wish to conceptualise or re-define their creative economy and creative industries:

- Recognise the importance of the creative economy by building on definitions and classifications of international and regional organisations and conceptualising creative industries in ways that consider national and regional economic structures; and
- Governments are encouraged to work with international organisations like IDB, UNCTAD, UNESCO, and WIPO towards a more harmonised concept and scope for the creative economy and industries.

It is essential to map and measure the creative economy and creative industries, including their contribution to international trade.

Measuring the creative economy can provide evidence and insights for policy makers to design, plan and implement policies targeting the creative industries and inform investors. Other benefits may include maximising job creation opportunities, identifying the critical clusters that can lead to economic growth and increased export revenues, identifying the spatial characteristics of the creative industries, and fostering cultural and creative tourism.

Considerations for countries who wish to start work on mapping and measuring their creative economies or improve their process:

- Mapping processes should include setting clear objectives, bringing together relevant stakeholders, conceptualising and defining the scope of creative industries, identifying parameters to measure and available data sources, collecting and analysing data; and
- Use already available definitions, classifications, methodologies, and guidelines by international and regional organisations like UNCTAD, UNESCO, and WIPO.

More and better data is needed to measure creative industries' economic contribution and international flows in creative goods and services.

The United Nations General Assembly resolution stresses the importance of regular, reliable, and comparable data on the creative economy's contribution to the SDGs. Some countries have made significant progress in measuring the economic contribution of the creative economy, especially to GDP, employment, and international trade. Others cooperated with international organizations like UNESCO and WIPO to prepare joint reports. But lack of data may lead to some creative industries and activities being overlooked by analysis, policy design, and development. There is a significant creative trade data gap between developed and developing countries. Trade classification systems based on the product's physical characteristics are not always helpful in capturing cultural and creative value. The issue with services trade data is its complexity and lack of statistical capacities in developing countries and LDCs.

Recommendations to improve data and statistics on the creative economy and creative industries:

- Involve authorities and institutions working in the cultural and creative sector, national statistical offices, and central banks to identify already existing data sources and compile data for measuring the contribution of the creative economy to GDP, employment, trade, and well-being;
- Mobilize funding and dedicate financial and human resources to regularly collect, produce and disseminate official data on the creative economy;
- Build statistical capacities to measure international trade flows in creative goods and services. In general, measuring servicification and international trade in creative services is increasingly important to monitor and measure structural transformation;
- For inclusive policies targeting creative industries, collecting and analysing data on women, youth, informal workers, and other marginalised groups working in the creative sector is essential to inform policy making. There is a need for more disaggregated data. For inclusive data collection, it is also necessary for national statistical offices to provide guarantees of the independence and confidentiality of statistical reporting; and
- International organisations can contribute with knowledge sharing, developing statistical guidelines, carrying out joint studies to measure countries' creative sectors, providing capacity-building activities in developing countries, and mobilising resources.

Creative services represent an increasing share of global services exports and generate substantial export revenues. However, developed economies largely dominate creative services exports.

Services, creative and non-creative, are potent enablers for economic diversification. They have the potential to generate more significant income, productivity, employment, investment, and trade. The increased reliance of national economies and international trade on services as inputs, also known as servicification, represents opportunities for developing countries to join global value chains and generate export revenues. Creative services are becoming increasingly important because, with technological innovation, there is an accelerating shift from producing creative goods to delivering creative services. However, new UNCTAD data show that developing countries are vastly under-represented in the exports of creative services, especially in the export of those related to research and development.

Policies to boost creative services in developing countries:

- Create and modernize the legal framework related to the creative economy, for example, by creating creative economy laws and updating intellectual property laws;
- Strengthen institutional capacities of government agencies in charge of promoting the creative economy;
- Identify and address challenges that hinder entrepreneurs and MSMEs from participating in digitally deliverable services, an increasingly important type of delivery since the COVID-19 pandemic. The most significant challenges that policy makers could address include poor connectivity in rural areas, lack of appropriate digital skills and competencies, limited access to online payment solutions and high logistics costs;
- Provide a copyright regime that balances the protection of copyrights and the right of access to culture and creative products and services, where the enforcement, collection, and distribution of royalties can take place systematically; and
- Improve developing country service providers' access to creative services markets in developed and developing countries, for example, by opening services markets to foreign providers.

Endnotes

- ¹ Inter-American Development Bank (2017). Public Policies for Creativity and Innovation: Promoting the Orange Economy in Latin America and the Caribbean. Inter-American Development Bank. August 2017. Available at: <https://publications.iadb.org/publications/english/document/Public-Policies-for-Creativity-and-Innovation-Promoting-the-Orange-Economy-in-Latin-America-and-the-Caribbean.pdf>.
- ² UNESCO (2009). UNESCO Framework for Cultural Statistics. Montreal. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000191061>.
- ³ WIPO (2015). Guide on Surveying the Economic Contribution of the Copyright-Based Industries. Available at <https://www.wipo.int/publications/en/details.jsp?id=259>.
- ⁴ See <https://daccess-ods.un.org/access.nsf/Get?OpenAgent&DS=A/RES/74/198&Lang=E>.
- ⁵ UNESCO (2022). Re-shaping policies for creativity: Addressing culture as a global public good. Available at <https://en.unesco.org/creativity/publications/2022-global-report-reshaping-policies-creativity>.
- ⁶ *Idem.*
- ⁷ *Idem.*
- ⁸ Bunketi Buse, N. R. (2020). COVID-19 and culture in Africa. A comparative analysis of economic impact studies. Arts Management. 27 August 2020. Available at: <https://www.artsmanagement.net/Articles/COVID-19-and-culture-in-Africa-A-comparative-analysis-of-economic-impact-studies,4184>.
- ⁹ The list of countries that replied to the survey: Andorra, Azerbaijan, Bahrain, Belgium, Benin, Cambodia, Canada, Central African Republic, Chile, Colombia, Ecuador, Georgia, Germany, Guatemala, Honduras, Latvia, Mauritius, Mexico, Mongolia, Morocco, Myanmar, Nicaragua, Oman, Panama, Paraguay, Peru, Poland, Portugal, Russian Federation, Slovenia, Trinidad and Tobago, Turkey, and United Arab Emirates.
- ¹⁰ UNCTAD has a list of 197 creative goods identified at the Harmonized System (HS) 6-digit level that fall under the following sub-categories: art crafts (carpets, products related to celebration, other crafts, paperware, wickerware, and yarn); audio-visuals (films and CDs, DVDs and tapes); design (architecture, fashion, glassware, interior, jewellery, and toys); new media (recorded media and video games); performing arts (musical instruments and printed music); publishing (books, newspapers, and other printed matter); and visual arts (antiques, painting, photography, and sculpture). For a detailed list of the creative economy product groups and hierarchy see https://unctadstat.unctad.org/EN/Classifications/DimHS2012Products_Creatives_Hierarchy.pdf. As per current UNCTAD definition, creative goods are dominated by design such as interior, fashion, jewellery products and toys. They made up almost two-thirds of all exports in 2020. The current product structure may lead to an over-estimation of trade with actual substantial creative content. This is because goods under the categories are not homogeneous and may include goods whose production is not “dominated by design.”
- ¹¹ Trade in creative services is measured using the Extended Balance of Payments Services Classification (EBOPS). UNCTAD considers ten EBOPS categories as creative services or services with a significant creative component. To achieve more comparability across countries, they are re-grouped as follows: research and development; software; audio-visual; information; advertising, market research, and architecture; and cultural, recreational, and heritage services.
- ¹² UNCTAD calculations based on UN COMTRADE Database.
- ¹³ *Idem.*
- ¹⁴ *Idem.*
- ¹⁵ UNESCO (2022). Re-shaping policies for creativity: Addressing culture as a global public good. Available at <https://en.unesco.org/creativity/publications/2022-global-report-reshaping-policies-creativity>.
- ¹⁶ UNCTAD calculations.
- ¹⁷ *Idem.*

- ¹⁸ *Idem.*
- ¹⁹ Badan Pusat Statistik and Badan Ekonomi Kreatif (2017). Ekspor ekonomi kreatif 2010–2016. ISBN: 978-602-438-195-0. Available at <https://www.bps.go.id/publication/2018/04/09/74b5c165025132e98a36c8f0/ekspor-ekonomi-kreatif-2010-2016.html>.
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- ²³ See <https://unctad.org/meeting/multi-year-expert-meeting-trade-services-and-development-ninth-session>.
- ²⁴ UNCTAD (2022). Creative Industry 4.0: Towards a new globalized creative economy. Available at <https://unctad.org/webflyer/creative-industry-40-towards-new-globalized-creative-economy>.
- ²⁵ International Data Corporation (2020). IDC FutureScape: Worldwide Digital Transformation 2021 Predictions. Doc # US46880818.
- ²⁶ See <https://www.itu.int/itu-d/reports/statistics/facts-figures-2021/>.
- ²⁷ See <https://www.itu.int/en/mediacentre/backgrounders/Pages/bridging-the-gender-divide.aspx>.
- ²⁸ Spennemann, C. (2019). Intellectual Property Rights in the Creative Economy. Presentation made as part of the UNCTAD short courses for Permanent Missions in Geneva (P166 courses). Geneva, 6 December 2019.
- ²⁹ UNCTAD (2022). Creative Industry 4.0: Towards a new globalized creative economy. Available at <https://unctad.org/webflyer/creative-industry-40-towards-new-globalized-creative-economy>.
- ³⁰ UNCTAD (2021). Technology and Innovation Report 2021. UNCTAD/TIR/2020. Geneva.
- ³¹ UNCTAD (2022). Creative Industry 4.0: Towards a new globalized creative economy. Available at <https://unctad.org/webflyer/creative-industry-40-towards-new-globalized-creative-economy>.
- ³² UNCTAD (2021). Financial inclusion for development: Better access to financial services for women, the poor, and migrant workers. Available at https://unctad.org/system/files/official-document/ditctnecd2020d6_en.pdf.
- ³³ See https://unctad.org/system/files/official-document/td540_en.pdf.
- ³⁴ See https://unctad.org/system/files/information-document/cep2022d01-cso-events_en.pdf.
- ³⁵ See <https://en.unesco.org/news/unesco-advocates-robust-and-resilient-cultural-economy-abu-dhabi-culture-summit-2021>.
- ³⁶ See <https://en.unesco.org/news/resiliart>.
- ³⁷ See <https://en.unesco.org/creativity/ifcd>.
- ³⁸ See <https://www.unido.org/19th-general-conference>.
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- ⁴⁰ See <https://www.brandglobal.org/brand-global-summit-2021/>.
- ⁴¹ See <https://www.wipo.int/wipoforcreators/en/>.
- ⁴² See https://www.youtube.com/watch?v=4gAKi7F2_B8.
- ⁴³ See <https://unctad.org/meeting/biennale-luanda-angola>.

- ⁴⁴ The list of countries that replied to the survey: Andorra, Azerbaijan, Bahrain, Belgium, Benin, Cambodia, Canada, Central African Republic, Chile, Colombia, Ecuador, Georgia, Germany, Guatemala, Honduras, Latvia, Mauritius, Mexico, Mongolia, Morocco, Myanmar, Nicaragua, Oman, Panama, Paraguay, Peru, Poland, Portugal, Russian Federation, Slovenia, Trinidad and Tobago, Turkey, and United Arab Emirates.
- ⁴⁵ As of May 2022, 164 economies reported creative goods trade data for 2018, 157 for 2019, 144 for 2020, and 100 for 2021. Regarding trade in creative services, 132 countries have data for 2018, 128 for 2019, and 105 for 2020.
- ⁴⁶ For a detailed list of the creative economy product groups and hierarchy see https://unctadstat.unctad.org/EN/Classifications/DimHS2012Products_Creatives_Hierarchy.pdf. As per current UNCTAD definition, creative goods are dominated by design such as interior, fashion, jewellery products and toys. They made up almost two-thirds of all exports in 2020. Under fashion, only accessories are covered such as suitcases, handbags, gloves, belts, scarves, hats, sunglasses. The current product structure may lead to an over-estimation of trade with actual substantial creative content. This is because goods under the categories are not homogeneous and may include goods whose production is not “dominated by design.”
- ⁴⁷ Trade in goods data for Switzerland is reported together with Liechtenstein.
- ⁴⁸ The list of SIDS is an analytical categorization: for analytical purposes UNCTAD applies stricter criteria concerning size, vulnerability, identification as island, and identification as a sovereign state.
- ⁴⁹ Note that global creative goods exports (US\$ 524 billion) and imports (US\$ 466 billion) are not equal due to bilateral trade asymmetries. Trade asymmetries are caused by countries applying different criteria of partner attribution in import and export statistics, applying different trade systems in data compilation, and the use of different valuation methods for exports and imports. For more information see <https://unstats.un.org/wiki/display/comtrade/Bilateral+asymmetries>.
- ⁵⁰ For further information see the methodology note: https://unctadstat.unctad.org/wds/ReportFolders/reportFolders.aspx?sCS_ChosenLang=en.
- ⁵¹ Because of the limitation in data availability does not allow breakdown of creative services imports by region and development status, the report only looks at creative services exports. No data are available for some major developed (*i.e.*, Australia, Italy) and developing economies (*i.e.*, Argentina, Brazil, India, Indonesia, Malaysia, Singapore, South Africa, Thailand, and Viet Nam). These countries’ creative services values were estimated for inclusion into regional and global totals but cannot be presented separately for individual economies. Data for Africa is based on country estimates, while no data is available for Oceania.
- ⁵² WTO’s contribution to this section is greatly appreciated.
- ⁵³ The OECD’s Services Trade Restrictiveness Index covers 22 sectors and 50 countries. See <https://stats.oecd.org/Index.aspx?DataSetCode=STRI>.
- ⁵⁴ Counting the European Union as one economy.
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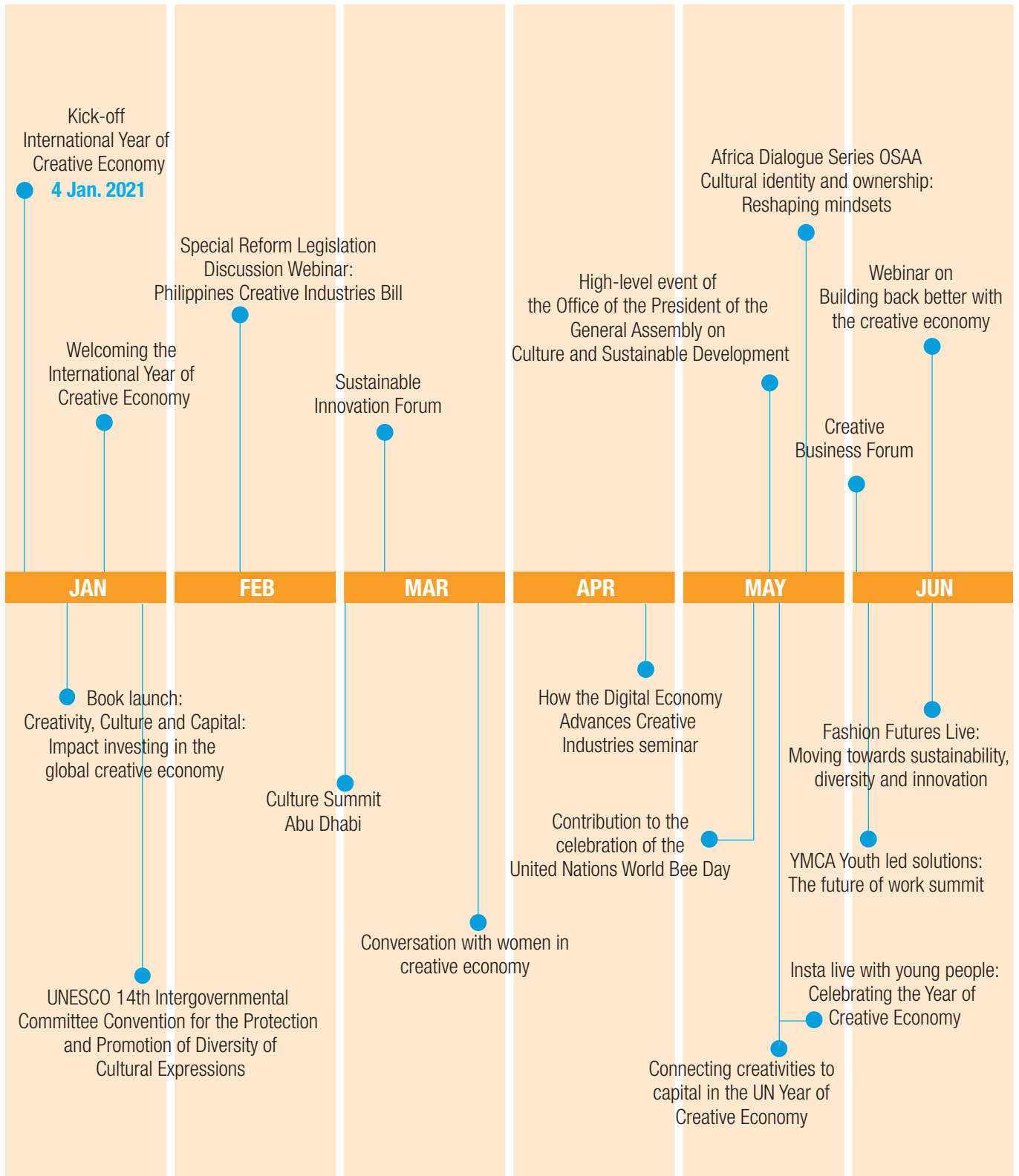
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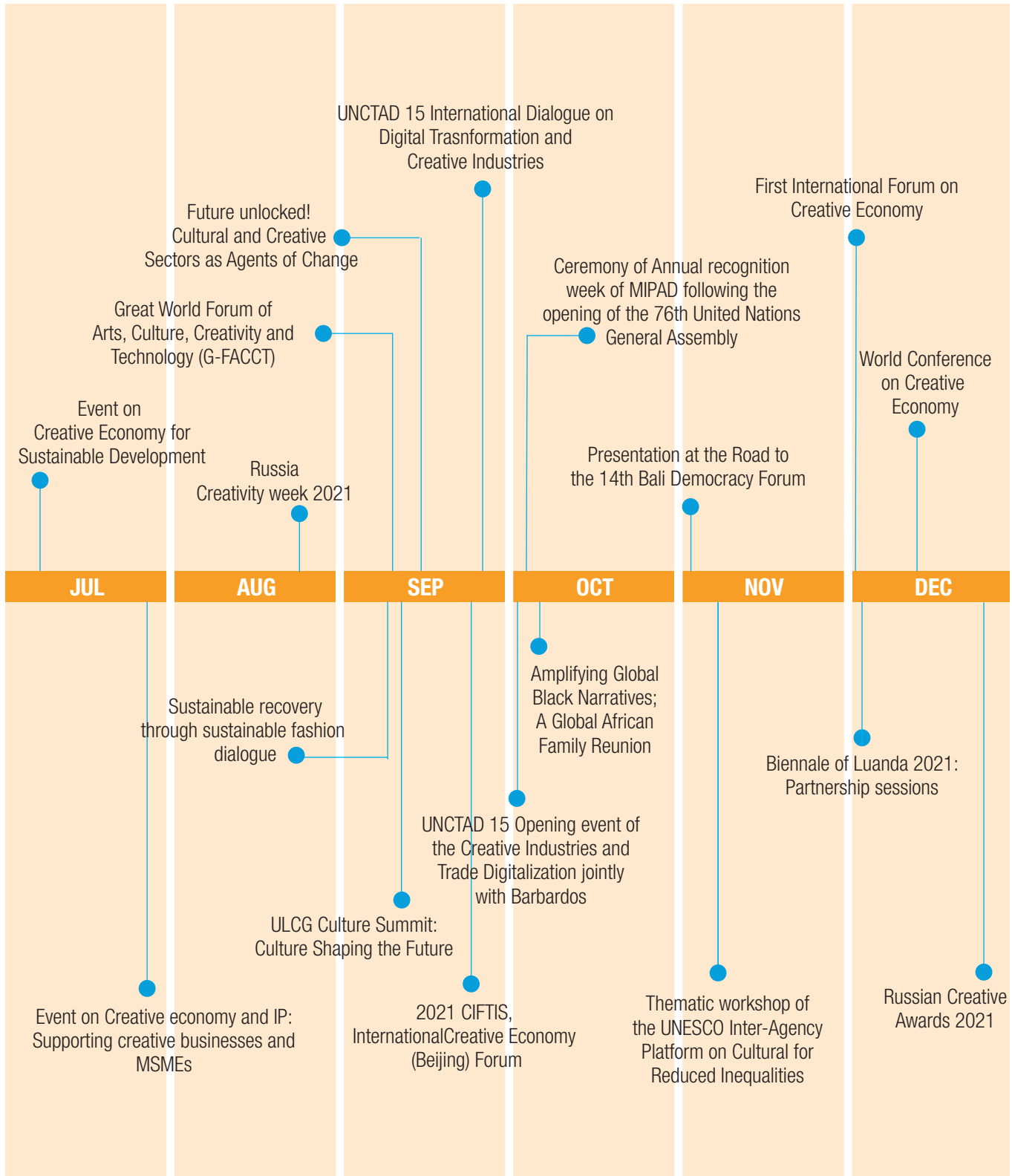
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Timeline of events organized and co-organized by UNCTAD
during the International Year of Creative Economy

Annex 1

This annex includes main UNCTAD events organized and co-organized during the International Year of the Creative Economy in 2021.









Summary of responses to the 2021 UNCTAD survey on
the creative economy

Annex 2



Andorra



Creative industries identified as priority in terms of their international trade potential

Audio-visual industry

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture
Actua (initiative of the Ministry of Economy)

Responsible agencies for specific creative industries

Actua: audio-visual industry

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

Development plan for the audio-visual industry (2021)

Example(s) of specific policies supporting creative industries

N/A

Example(s) of COVID-19 policy measures targeting the creative economy

N/A

Azerbaijan

Creative industries identified as priority in terms of their international trade potential

Music; fashion and design; film; video and photo; handicrafts; games and creative technologies

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Economy
Ministry of Culture
State Tourism Agency
“ABAD” (simplified support to family businesses, a public legal entity)

Responsible agencies for specific creative industries

Ministry of Culture: music; dance; theatre; visual arts; fashion and design; architecture; film, video and photo; handcraft; visual arts; publishing and literature; games and creative technologies; TV and radio; advertising
State Tourism Agency: handcraft; architectural design; heritage sites and museums
ABAD: small business areas including family business and crafting
Ministry of Transport, Communications and High Technologies: innovations, start-up development
National Television and Radio Council: TV and radio
State Advertising Agency of the Republic of Azerbaijan: advertising

Surveys, studies, and assessments about the economic contribution of creative industries

Developing Cultural and Creative Industries in Azerbaijan (2018)
UNESCO Culture for Development Indicators – Azerbaijan’s Technical and Analytical Reports (2018)
Development of Cultural and Creative Industries in Azerbaijan – A Preliminary Situational Analysis (2018)
Outline Strategy for Development of the Cultural and Creative Industries in Azerbaijan 2020–2030 and Preparatory Work Plan for 2019 (2019)
Development Perspectives of Creative Industries in Azerbaijan: Drawing on Experiences of Five Successful Countries with Support of the Ministry of Culture (2019)



National plan or strategy supporting creative industries

Strategic Road Map on the prospects of the national economy, on the manufacture of SME-level consumer goods approved by the Decree of the President of the Republic of Azerbaijan (2016)

Decree of the President of the Republic of Azerbaijan on further improvements in the management of small and medium businesses (2017)

State Program on protection and development of carpet art in the Republic of Azerbaijan (2018–2022)

State program of socio-economic development of the regions of the Republic of Azerbaijan (2019–2023)

Order of the President of the Republic of Azerbaijan on ensuring coordination in the field of innovative development in the Republic of Azerbaijan (2019)

Azerbaijan 2030: National Priorities for socio-economic development (2021)

A specific strategy paper for the development of creative industries in Azerbaijan is currently under preparation

Example(s) of specific policies supporting creative industries

Increase public awareness on CCIs

Provide capacity building trainings, seminars, exchanges and other development courses to the creative youth and talents in CCIs

Create financing instruments on CCIs and provide updates on the existing financial supporting opportunities

Stimulate the export of local creative and cultural products

Support conducting research and studies in CCIs

Example(s) of COVID-19 policy measures targeting the creative economy

Tax benefits and vacations to businesses in creative industries (January 2020)

Plan to provide financial support of 6 million manat (US\$ 3.5 million) to production entities using national traditions and material heritage (December 2020)

Bahrain



Creative industries identified as priority in terms of their international trade potential

N/A

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Industry, Commerce and Tourism
Ministry of Information Affairs
Authority for Culture and Antiquities

Responsible agencies for specific creative industries

Directorate of Foreign Trade and Industrial Property: trademarks, patents, industrial designs
Directorate of Media Affairs: copyrights and related rights
Authority for Culture and Antiquities: culture and antiquities

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

N/A

Example(s) of specific policies supporting creative industries

N/A

Example(s) of COVID-19 policy measures targeting the creative economy

N/A

Belgium



Creative industries identified as priority in terms of their international trade potential

Priority sectors for the Wallonie-Bruxelles Federation: audio-visual arts and industry; music; performing arts (theatre, dance, and circus); design and fashion; architecture

Ministry/agency with overall responsibility for cultural and creative industries

The promotion support of cultural products is determined at the regional level
 Government of the Wallonia-Brussels Federation: Minister of Children, Health, Culture, Media, and Women's Rights
 Flemish Government: Minister for Foreign Policy, Culture, IT and General Services

Responsible agencies for specific creative industries

Department of Economic Policy – Economy Employment Research Public Service of Wallonia: cultural and creative industries (CCIs)
 General Administration for Culture: CCIs

Surveys, studies, and assessments about the economic contribution of creative industries

Permanent Conference on Territorial Development (2021)
 The cultural and creative economy in the Brussels-Capital Region (2018)
 Creative Wallonia (selection of actions) and Walloon Creative Hubs (2020)

National plan or strategy supporting creative industries

N/A

Example(s) of specific policies supporting creative industries

The Wallonie-Bruxelles Federation has specific teams dedicated to the support and promotion of CCI's such as audio-visual arts and industry, music, performing arts, design and fashion, architecture
 Creation of Wallimage, a support organism for audio-visual projects and investment fund for films and audio-visual businesses (1999)
 Creation of St'Art Invest, the investment fund for CCIs in Wallonia and Brussels (2009)
 Creation of the Walloon Hubs to impulse at the local level new creative economy dynamics by fostering collaboration between CCIs and "traditional" industries (2015)
 Two Interreg Europe Projects on the CCI thematic: RCIA and Creadis3 to implement the best practices to support CCI sector and improve the Creative hubs policy (2017)

Example(s) of COVID-19 policy measures targeting the creative economy

Short-term low-interest loans for CCI SMEs were made available in the context of the health crisis with the amount from EUR 20,000 to EUR 100,000 and a fixed rate of 2 per cent (March 2020)
 2nd edition of the call for projects by St'art focusing on the influence of Wallonia. EUR 2.8 million was made available to support creative and cultural industries. (December 2020)

Benin



Creative industries identified as priority in terms of their international trade potential

Performing arts

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Tourism, Culture and Arts
Ministry of Living Environment and Sustainable Development

Responsible agencies for specific creative industries

Funds for Art and Culture: funding of cultural and artistic initiatives
Benin Office of Copyright and Neighbouring Rights: defence of artists' interests
International Theatre Festival of Benin: promotes and celebrates Benin's and African theatre in all its forms
National Agency for the Promotion of Heritage and Tourism: highlights the natural, historical and cultural heritage
Digital Development Agency: implements flagship projects in the digital sector

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

Flagship projects identified to boost growth and improve the living conditions of the population (2016–2021)
Action Program of the Government (2016–2021)

Example(s) of specific policies supporting creative industries

Creation of the National Gallery (2020)
Reinforcement of public funding
Capacity building of agents

Example(s) of COVID-19 policy measures targeting the creative economy

Tax reduction for companies
Facilitating access to finance for businesses

Cambodia



Creative industries identified as priority in terms of their international trade potential

Film; performing arts; textile and traditional craft; garment and footwear manufacturing; e-commerce; crafts and arts; electrical equipment export industries

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture and Fine Arts
Ministry of Industry and Handicraft
Ministry of Posts and Telecommunications of Cambodia
Ministry of Tourism
Ministry of Labour and Vocational Training

Responsible agencies for specific creative industries

Department of Cinema and Cultural Diffusion: films
Department of Performing Arts: performing arts
Department of Books and Reading: books
Department of Fine Arts and Handicrafts: craft
Department of Cultural Development: cultural development
Ministry of Industry and Handicraft: industrial products and handicrafts
General Department of ICT: ICT research and development
Cambodian Academy of Digital Technology: software and digital contents
Department of Tourism Products Development: crafts and arts (community level in particular)
Department of Tourism Entertainment and Sports: sports and entertainment
Directorate General of Technical Vocational Education and Training: skills development

Surveys, studies, and assessments about the economic contribution of creative industries

Operationalizing Gender Aspects in the Creative Industries Support Programme (2010)
Creative industries support programme in Cambodia (2012)
Start-up kingdom: Cambodia's tech start-up ecosystem (2018)

Cambodia (continued)

National plan or strategy supporting creative industries

National Strategic Tourism Development Plan (2012–2020)
 National Policy for Culture (2014)
 Cambodia Industrial Development Policy (2015–2025)
 Rectangular Strategy Phase IV, Rectangle 2 Economic Diversification, Side 2 Development of Key and New Source of Growth (2018)
 Strategic Plan of Ministry of Culture and Fine Arts (2019–2023)
 Three Years Rolling Strategic plan of Ministry of Culture and Fine Arts (2020–2022)
 Cambodian ICT Masterplan (2020)

Example(s) of specific policies supporting creative industries

Use of cultural potentials for economic development (*i.e.*, promote Cambodia to become a centre for performing arts, cultural products, and a location for foreign film productions)
 Elevation and promotion of cultural industries (*i.e.*, organise regular annual cultural events)
 Support for cultural partners (*i.e.*, coordinate with cultural entrepreneurs, private sector, civil society)
 Support for creative markets in the field of culture (*i.e.*, market research, protection of copyrights)
 Cultural development
 Investment promotion
 Cambodia ICT Masterplan 2020 (*i.e.*, empower people, ensure connectivity, enhance capabilities, enrich e-services)

Example(s) of COVID-19 policy measures targeting the creative economy

Help for small and medium-sized enterprises and general workers in the film industry (2020)
 Tax exemptions for hotels and guesthouses
 E-learning and e-library development
 Suspension of National Social Security Fund payments for enterprises in the garment industry

Canada



Creative industries identified as priority in terms of their international trade potential

Audio-visual and interactive media; design (*i.e.*, exhibit design, fashion design, artistic product design, public art design, urban design); music; performing arts; publishing; visual art

Ministry/agency with overall responsibility for cultural and creative industries

Department of Canadian Heritage: creativity, arts and culture; heritage and celebration; sport; diversity and inclusion; official languages

Responsible agencies for specific creative industries

Canada Council for the Arts: audio-visual and interactive media; design; music; performing arts; publishing; visual art
 Canadian Broadcasting Corporation / Société Radio-Canada: audio-visual and interactive media; music
 Canadian Radio-television and Telecommunications Commission: audio-visual and interactive media
 Department of Canadian Heritage: architecture; audio-visual and interactive media; design (*i.e.*, exhibit design, fashion design, artistic product design, public art design, urban design); music; performing arts; publishing (*i.e.*, books, periodicals); visual art
 National Arts Centre: performing arts
 National Film Board of Canada: audio-visual and interactive media
 Telefilm Canada: audio-visual and interactive media

Surveys, studies, and assessments about the economic contribution of creative industries

Culture Satellite Account (2022)
 The Culture, Arts, Heritage and Sport Economic Impact Model (2022)

National plan or strategy supporting creative industries

Creative Canada Policy Framework (2017)
 Creative Export Strategy (2018)

Canada (continued)

Example(s) of specific policies supporting creative industries

Canada Arts Presentation Fund
 Canada Arts Training Fund
 Canada Book Fund
 Canada Council for the Arts' granting programs
 Canada Cultural Investment Fund
 Canada Cultural Spaces Fund
 Canada Feature Film Fund
 Canada Media Fund
 Canada Music Fund
 Canada Periodical Fund
 Canadian Film or Video Production Tax Credit
 Film or Video Production Services Tax Credit
 Funding provided by the Department of Canadian Heritage to TV5MONDE

Example(s) of COVID-19 policy measures targeting the creative economy

Advance funding (March 2020)
 Waiving payments for Part I licence fees for the broadcasting sector (March 2020)
 Digital Originals Initiative (April 2020)
 Emergency Support Fund for Culture, Sport and Heritage Organizations (May 2020)
 Emergency funding for the National Arts Centre (July 2020)
 Support for book distributors (July 2020)
 Special measures for journalism (July 2020, December 2021)
 Short Term Compensation Fund for Canadian Audio-visual Productions (October 2020)
 Support for arts and live event workers in response to COVID-19 (March 2021)

Central African Republic



Creative industries identified as priority in terms of their international trade potential

Music; cinema; plastic arts and cultural; natural and mixed heritage sites

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Arts, Culture and Tourism: cultural and creative industries

Responsible agencies for specific creative industries

Central African Theatre Federation: theatre
 Union of Central African Musicians and the Federation of Central African Orchestras: music
 Central African Dance Federation: dance
 Central African Plastic Arts Federation: plastic arts: sculpture; painting

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

National Cultural Policy Document (2005, reviewed and validated in 2020)

Example(s) of specific policies supporting creative industries

Law on Cultural Chapter (2006)
 Decree on the protection of cultural heritage (2009)
 Law on copyright and related rights (2020)
 Decree establishing the National Cinematography Centre (2020)
 National cultural policy document (2020)

Example(s) of COVID-19 policy measures targeting the creative economy

Contingency plan for the arts and culture sector in the fight against COVID-19 (2020)

Chile

Creative industries identified as priority in terms of their international trade potential

Animation; visual arts; performing arts; audio-visual arts; design; editorial; fashion; music; graphic narrative and illustration; videogames

Ministry/agency with overall responsibility for cultural and creative industries

General Directorate for the Promotion of Exports (ProChile): promotion of exports, country brand, cultural and creative industries.

Chilean Economic Development Agency (CORFO): creative economy
Ministry of Cultures, Arts and Heritage, Creative Economy Secretariat, Development Department

Ministry of Foreign Relations, Directorate of Cultural Affairs

Responsible agencies for specific creative industries

Development Department, Undersecretariat for Cultures and Arts: creative economy; music, book and editorial, audio-visual fund, artistic areas promotion

Undersecretary's Cabinet: copyright

Surveys, studies, and assessments about the economic contribution of creative industries

Diagnosis and characterization of the creative economy: Gaps and drivers of the 4 prioritized subsectors and the governance of public efforts (2015)

Economic diagnosis of author's fashion in Chile (2016)

Update on the economic impact of the creative sector in Chile (2016)

Economic diagnosis of signature footwear in Chile (2017)

Research on the characterization of new intermediaries for the export of goods and services of the audio-visual, music, book and design industries (2017)

Gaps in Access to Private Financing in Creative Industries in Chile (2017)

Export platform model for the Chilean book (2017)

Pre-design and feasibility for the creation of a technology centre on Creative Industries in Chile (2017)

Economic characterization of creative agents (2018)

First mapping of companies providing virtual and augmented reality services in Chile (2019)

Results of the status survey of agents, centres and cultural organizations (2020)

Characterization of the Chilean music industry: Foreword, background and methodology (2021)

Characterization of the Chilean music industry: Music and technology (2021)

Export mapping of Chilean creative industries (forthcoming)



National plan or strategy supporting creative industries

National Plan for the Promotion of the Creative Economy (2017)
National Culture Policy 2017–2022 (2017)

Example(s) of specific policies supporting creative industries

Strategic program for intelligent specialization in creative economy (2015)
National Policy for the Music Sector 2017–2022 (2017)
National Policy for the Audio-visual Sector 2017–2022 (2017)
Performing Arts, Law for the Promotion and Development of Performing Arts (2019)
Public-private alliance to promote digital marketing (2020)
Register of cultural, artistic and heritage agents (2021)
Financing lines of culture funds for creative economy: Performing Arts Fund, Book and Reading Fund, Music Fund (2021)
Creative industries program of the audio-visual fund (2021)
Creative economy financial line (2022)
National Policy on Reading and the Book 2022–2027 (2022)

Example(s) of COVID-19 policy measures targeting the creative economy

The support plan for the CCI sector consists of four pillars:

- 1) measures aimed at strengthening management and programming of cultural organisations;
- 2) acquisition of cultural content;
- 3) promotion of creation, production and circulation;
- 4) training and mediation of artistic and cultural content (2020)

Reactivation support projects (2021)

Colombia

Creative industries identified as priority in terms of their international trade potential

Audio-visual sector; publishing industry; music industry; digital industry

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture of Colombia: arts and heritage, cultural and creative industries

Responsible agencies for specific creative industries

Ministry of Culture: cultural, creative industries, heritage; visual arts, music, dance, theatre, circus, literature and books; cinema, TV, community and public radio, digital cultural content, cultural journalism, cultural communication and childhood; integration, access and circulation; opportunity and public innovation; satellite account of information on culture and orange economy

Regional Advancement Directorate: orange economy courses

Mujeres Narran su Territorio-Population Directorate: promotion of entrepreneurship for vulnerable and ethnic groups

Ministry of Finance and Public Credit: prepare legislation on fiscal, tax, customs, and public credit-related matters, as well as preparing budgets to promote creative and cultural industries

Ministry of Labour: promotion of labour rights in the creative economy sector

Ministry of Commerce, Industry and Tourism: investment attraction and the opening of new markets for creative and cultural industries, production of economic studies

Ministry of Education: qualifications framework for the recognition of occupations in the creative and cultural industries

Ministry of Information Technology and Communications: information technologies, social media, and software development

National Department of Statistics (DANE): development of measurements to identify the contributions of culture to social and economic development

National Training Service (SENA): training in entrepreneurship and capacity building in creative and cultural industries

National Copyright Office (DNDA): recognition of copyrights of the creative economy activities

Financial Entity for the Territorial Development S.A.: financing for institutional strengthening the creative economy in the territories

National General Archive: safeguarding and disseminating documentary heritage

Colombian Institute of Anthropologic and History: guidelines for the formulation and implementation of public policies in heritage, anthropological, archaeological and historical matters

Creation of the Corporation Colombia Crea: promotion of the development of the value chains of the various creative sectors such as arts, entrepreneurship, and culture in the national territory

INNpalsa: Entrepreneurship and Innovation Agency

Colombian Handicrafts - Artesanías de Colombia: Promotion of the craft sector

Caro and Cuervo Institute: protection of the linguistic heritage of Colombia

Proimágenes Colombia: consolidation of Colombian film industries



Surveys, studies, and assessments about the economic contribution of creative industries

Cultural and Orange Economy Satellite Account (updated annually)
 Cultural and Creative Economy Satellite Account of Bogotá (*idem*)
 Cultural Consumption Survey (*idem*)
 Quality of life survey (*idem*)
 Quarterly sample of services (*idem*)
 Quarterly sample of services in foreign trade (*idem*)
 Integrated Household Survey (*idem*)
 Orange Economy Report (*idem*)

National plan or strategy supporting creative industries

Law 1493 of 2011, Formalization of the public entertainment and performing arts sector (2011)
 Law 1556 of 2012, Colombian film law (2012)
 Law 1834 of 2017 or orange law (2017)
 Decree 1935 of 2018, National Council of Orange Economy (2018)
 Law 1955 of 2019 or National Development Plan 2018–2022, pact for the Protection and promotion of our culture and the development of the Orange Economy (2019)
 Decree 1204 of 2020, “Política Integral Naranja” Orange Economy Integral Policy (2020)
 Comprehensive policy of the Colombian Orange Economy (2020)
 Monitoring and evaluation: Comprehensive policy of the Colombia Orange Economy (2020)
 Law 2070 of 2020, “ReactivARTE” (2020)

Example(s) of specific policies supporting creative industries

National incentive program for artists and creators (annual program, available since 1997)
 Decree 2120 of 2018 creation of the Vice-ministry of Creativity and Orange Economy in the Ministry of Culture (2018)
 Creation of the Corporation Colombia Crea (2019)
 Decree 474 de 2020, Expansion of the benefits of the Colombian film law (2020)
 Orange Development Area (2020)
 Decree 697 of 2020, tax deduction and orange development areas or creative districts (2020)
 Law 1943 of December 2018, Law 2010 of December 2019, Decree 286 of February 2020, 7-year income tax exemption for orange economy companies (2020)
 Concert Rooms and Circus Tents (2021)
 Cultural Concerts Programme (annual program)

Example(s) of COVID-19 policy measures targeting the creative economy

Decree 401 of 2020
 Decree 475 of 2020
 Decree 561 of 2020
 Decree 639 of 2020
 Decree 818 of 2020
 Public Call: “Comparte lo que Somos”, for promoting proposals of creative and cultural actions to address social isolation

Ecuador



Creative industries identified as priority in terms of their international trade potential

N/A

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture and Heritage: culture and heritage
National Service of Intellectual Property: intellectual rights (intellectual property and traditional knowledge)
Ministry of Telecommunications: telecommunications

Responsible agencies for specific creative industries

National Music Support Agency, Intellectual Property Service: music
National Service for Intellectual Rights (intellectual property and traditional knowledge): all creations protected by intellectual property
Institute for the Promotion of Creativity and Innovation: cinema and audio-visual
National Institute of Cultural Heritage: cultural heritage
Ministry of Culture and Heritage: all forms of culture and creativity

Surveys, studies, and assessments about the economic contribution of creative industries

The Economic Contribution of Copyright Industries in the Republic of Ecuador by WIPO (2017)
Global Innovation Index (2020)

National plan or strategy supporting creative industries

Comprehensive Plan for the Promotion of Culture – Creative Ecuador (2019)
Ecuador Digital Policy (2019)

Example(s) of specific policies supporting creative industries

N/A

Example(s) of COVID-19 policy measures targeting the creative economy

N/A

Georgia



Creative industries identified as priority in terms of their international trade potential

Fashion; apparel, architecture, design

Ministry/agency with overall responsibility for cultural and creative industries

Creative Georgia: creative industries, creative industry capacity building & research, CCI policy elaboration and advocacy

Responsible agencies for specific creative industries

Creative Georgia: creative industries, creative industry capacity building & research, CCI policy elaboration and advocacy

Surveys, studies, and assessments about the economic contribution of creative industries

UNESCO Culture for development indicators for Georgia (2017)
Developing cultural and creative industries in Georgia (2017)

National plan or strategy supporting creative industries

Cultural Strategy 2025 (2016)
Creative Twist – Boosting the cultural and creative industries in Georgia, which will become effective in 2022–2023 (forthcoming)

Example(s) of specific policies supporting creative industries

Georgian National Culture Fund (2017)
Creative Industry Funding Scheme (2019)

Example(s) of COVID-19 policy measures targeting the creative economy

Competition for capacity building and open projects for CCI as a COVID-19 response (2020)

Germany



Creative industries identified as priority in terms of their international trade potential

Design and new media; fashion; animation as part of the film sector; music

Ministry/agency with overall responsibility for cultural and creative industries

Federal Government Commissioner for Culture and the Media: overall responsibility for cultural and creative industries nationally
Federal Ministry for Economic Cooperation and Development (BMZ): cultural and creative industries in international development cooperation

Responsible agencies for specific creative industries

Federal Ministry for Economic Cooperation and Development: music, fashion, animation, design
Federal Ministry for Economic Cooperation and Development, GIZ, Goethe-Institut, Deutsche Welle Academy: film

Surveys, studies, and assessments about the economic contribution of creative industries

Pilot study Promotion of creative industries in Africa through German development cooperation (2018)
Fair Culture study – a Key to Sustainable Development (2021)

National plan or strategy supporting creative industries

Cultural and creative industries – drivers of development (2020–2023)
«Future, Market, Film» initiative (2017)
Culture for Development (2017)

Example(s) of specific policies supporting creative industries

Promoting culture as an economic factor in particular in Africa and the Middle East
Improving the enabling environment
Training and financial support for creatives affected by the COVID-19 pandemic

Example(s) of COVID-19 policy measures targeting the creative economy

Targeted trainings to upskill creatives and support creatives in adjusting to the new working conditions (2021)
Targeted financing possibilities through stipends: for internships and job placements and for the duration of the participation in trainings that support creatives in adjusting to the current situation

Guatemala



Creative industries identified as priority in terms of their international trade potential

Audio-visual industry (film, audio-visual production, 2D and 3D digital animation, video games, photography, music and sound production); creativity and digital industries (marketing, communication, graphic design)

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture and Sports
Ministry of Economy
Guatemala Institute for Tourism design)

Responsible agencies for specific creative industries

General Directorate of Cultural Development and Strengthening of Cultures: art (music, painting, sculpture, dance, etc.), sports and recreation, cultural development and cultural heritage
Orange Economy Commission: music, cinematography, 3D digitization, audio-visual production
Guatemalan Association of Audio-visual and Cinematography: producers, directors, technicians and workers linked to art and audio-visual production
Directorate of Micro, Small and Medium Enterprise: Artisan products through the Weaving Food Program and the Women's Project
Directorate of Micro, Small and Medium Enterprise: crafts, gastronomy, tourism, agribusiness and the orange economy, through the Programme My People, My Product
PROMIPYMES (Centres for the Promotion of Micro, Small and Medium Enterprises): tourism and art

Surveys, studies, and assessments about the economic contribution of creative industries

Guatemala advances in the development of an orange economy (2015)
Las industrias culturales y creativas en Iberoamérica: evolución y perspectivas (2018, chapter on Guatemala)
The Orange Economy and cultural belonging as a generator of employment and development (2020)
The arts and their commitment to survival (2021)

National plan or strategy supporting creative industries

N/A

Example(s) of specific policies supporting creative industries

N/A

Example(s) of COVID-19 policy measures targeting the creative economy

N/A

Honduras



Creative industries identified as priority in terms of their international trade potential

Films, fashion and design, music, painting, IT programming, robotics, geotourism

Ministry/agency with overall responsibility for cultural and creative industries

Commission for the Orange Economy: support for creatives and cultural activities
 SENPRENDE: technical and financial support to SMEs
 IHCIETI: education and research, promotes the culture of scientific research and technological development
 General Directorate of Culture, Arts and Sports: public policies for the prevention of violence, recreation and citizen coexistence through art and culture
 Property Institute – Intellectual Property Division: intellectual property rights
 Property Institute: facilitate access for innovators, inventors and researchers

Responsible agencies for specific creative industries

Secretary of the Presidency/Orange Economy Commission: ICTs, music, arts, painting, films

Surveys, studies, and assessments about the economic contribution of creative industries

Embarking on an orange future: fifteen questions to better understand creative entrepreneurs in Latin America and the Caribbean (2018)
 Las industrias culturales y creativas en Iberoamérica: evolución y perspectivas (2018, chapter on Honduras)

National plan or strategy supporting creative industries

National strategy to revitalize the tourism and culture industry (2014)
 Technology and Innovation Support Centre (2016)
 Geotourism strategy (IHT) – Honduran Tourism Institute (2019)
 Campaign for the production and promotion of intellectual property for all (2021)

Example(s) of specific policies supporting creative industries

Culture Satellite Account (UNAH/Directorate of Culture, Arts and Sports) (2012)
 Terra te impulsa (e-promotion) (2020)

Example(s) of COVID-19 policy measures targeting the creative economy

N/A

Latvia



Creative industries identified as priority in terms of their international trade potential

Sound processing and technical equipment industry, pop music industry; movie industry; children's fashion and children's goods; architecture

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture
Investment and Development Agency

Responsible agencies for specific creative industries

Creative Industries Division of the Ministry of Culture: pop music, architecture, design
Arts Policy Division of the Ministry of Culture: theatre, visual arts, literature, classical music
Media Policy Division of the Ministry of Culture: media
Archives, Libraries and Museums Division of the Ministry of Culture: museums
National Film Centre: cinematic art
Latvian National Centre for Culture: cultural education
National Electronic Mass Media Council (NEPLP): media

Surveys, studies, and assessments about the economic contribution of creative industries

Research of creative industries – updating statistical data (2008)
Creative industries in Estonia, Latvia, Lithuania (2010)
The performance of the creative industries sector of Latvia and preconditions for its targeted development (2013)
Annual study on the impact of cultural consumption and participation (2020)
Enhancing the potential of creative industries: case study of the music industry as a new dimension in the development of the region (2021)

National plan or strategy supporting creative industries

Creative industries are included in long term national sustainability document - Latvia's sustainable development strategy 2030 (2010)
Creative industries are included in Cultural Education Sector Strategy 2014–2020
Creative industries are included in the National Development Plan of Latvia 2021–2027 (2020)
Creative industries are included in Guidelines of the National Industrial Policy for 2021–2027 (2021)
Guidelines for cultural policy 2021–2027 (forthcoming)

Latvia (continued)

Example(s) of specific policies supporting creative industries

VKKF: a public foundation with the aim of promoting the balanced development of creativity in the cultural and artistic sectors and the preservation of cultural heritage (1998)

Radi!: annual initiative to highlight the most prominent products and services of the creative industries (2011–2012)

FOLD: online information platform: brings forward the best in Latvian and foreign creative industries to help discover, understand, learn and collaborate (2013)

Creative Industries Business Incubator: provides support to existing and to new and emerging entrepreneurs in the creative industries (2016)

National Design Award (2017)

Latvian Dance Award (2018)

Latvian Design Center: promotes the long-term development of the Latvian design field (2018)

Example(s) of COVID-19 policy measures targeting the creative economy

Entrepreneurs affected by Covid-19 can apply for ALTUM support program's grants and loans (ongoing)

The State Revenue Service provides general support options (2021)

State Culture Capital Foundation program:

Sustainability of cultural organizations affected by Covid-19 (2020)

Creative Persons Employment Program (2020)

Reimbursement of tickets for organizers of cultural events (2021)

Kulturelpa (2021)

Mauritius



Creative industries identified as priority in terms of their international trade potential

N/A

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Arts and Cultural Heritage: promotion of arts and culture; preservation and promotion of heritage

Responsible agencies for specific creative industries

Conservatoire National de Musique Francois Mitterrand, Centre de Formation Artistique: music performance and training
 Centre de Lecture et d'Animation Culturelle, Drama Section Ministry of Arts and Cultural Heritage: drama
 Mauritius Society of Authors (MASA): Collective management organisation
 Mauritius Film Development Corporation, Film Classification Board: film
 National Art Gallery, Malcolm de Chazal Trust Fund: visual arts
 President's Fund for Creative Writing, Mauritius Council for Registered Librarians, National Library: literature
 Apravasi Ghat Trust Fund, Le Morne Heritage Trust Fund, National Heritage Fund, Mauritius Museums Council, National Archives Department: cultural heritage
 Islamic Cultural Centre Trust: Consolidation of existing pluralism, and the celebration of cultural values
 Mauritius Marathi Cultural Centre Trust, Mauritius Telugu Cultural Centre Trust, Nelson Mandela Centre for African Culture, Mauritius Tamil Cultural Centre Trust: Promotion of cultural interaction among different cultural components within the country

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

Mauritius (continued)

National plan or strategy supporting creative industries

Creative Mauritius 2025 (Draft White Paper)

Example(s) of specific policies supporting creative industries

N/A

Example(s) of COVID-19 policy measures targeting the creative economy

Review of the existing schemes under the National Arts Fund for virtual exhibitions (2021)
 Review of the scheme "Other Support to Artists (for the production of CDs and DVDs)" (2020)
 Virtual visit of heritage sites (2021)
 Support to local authors (2021)
 Support to local artists (fine arts) (2021)
 Production of a collection of short stories of local authors on their individual Covid-19 experience in e-book format (ongoing)

Mexico



Creative industries identified as priority in terms of their international trade potential

Visual and plastic arts, audio-visual media

Ministry/agency with overall responsibility for cultural and creative industries

Secretariat for Culture, Directorate General for Promotion and Cultural Festivals

Responsible agencies for specific creative industries

Mexican Institute of Cinematography: cinema
National Institute of Fine Arts and Literature: music, dance, theatre, literature
Fund of Economic Culture: books
National Fund for the Promotion of Handicrafts: crafts

Surveys, studies, and assessments about the economic contribution of creative industries

Satellite Account of Culture of Mexico (2020)

National plan or strategy supporting creative industries

A national strategy is being built from the México Creativo initiative

Example(s) of specific policies supporting creative industries

PROFEST - Support for performing arts festivals (theatre, circus, puppets, cabaret, dance, music, etc.), visual arts and design, literature and gastronomy (2021)
Support system for creation and cultural projects (2021)
Call for support by IMCINE (2021)

Example(s) of COVID-19 policy measures targeting the creative economy

Contigo en la Distancia: free access to a digital culture space, includes tours of museums and archaeological sites, films, books, concerts, conferences, documentaries, plays, audios, applications. Creators were supported to create content for this digital space. (2020–2021)
Emerging Laboratory for Cooperation (Laboratorio Emergente de Cooperación) to raise awareness of the need to put local experiences at the centre of cultural development within cultural and creative economies and to take a local, sustainable and open approach to collectivize knowledge

Mongolia



Creative industries identified as priority in terms of their international trade potential

Priorities for innovation activities: information technology; new material technology; biotechnology and production technology; renewable energy technology; national cultural innovation; and creative production

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Education and Science: development of high technology and national innovation system; industry production and services
 Ministry of Culture: access and quality of arts and culture services; competitiveness of cultural and arts organizations; protection of national, historical and cultural heritage; economic and social benefits of creative cultural production; promotion and dissemination of cultural and artistic achievements

Responsible agencies for specific creative industries

Ministry of Education and Science
 Ministry of Culture
 Culture and Arts Authority
 Ministry of Food, Agriculture and Light Industry

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

National Program on Cultural Production (Government Resolution No. 509 of 2015)
 Government policy on innovation (Government Resolution No. 233 of 2018)
 National Innovation System Development Program (Government Resolution No. 33 of 2020)

Example(s) of specific policies supporting creative industries

Action Strategy and Organizational Restructuring Program of the Ministry of Culture (2015)
 Establishment of a science park by 2030
 Establishment of national and regional industrial and technology parks and exchanges by 2025

Example(s) of COVID-19 policy measures targeting the creative economy

The Ministry of Culture is working on specific provisions in the cultural creative production II project

Morocco



Creative industries identified as priority in terms of their international trade potential

Cultural heritage; tourism; arts, music; theatre; publishing; books; copyrights

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture, Youth and Sports – Department of Culture

Responsible agencies for specific creative industries

Ministry of Culture, Youth and Sports (Department of Arts): arts, music, theatre, publishing; books; cultural heritage
Moroccan Office for Author's Rights: copyrights
National Foundation of Museums: museums
Federation of Cultural and Creative Industries (FICC) – cultural and creative industries legislation

Surveys, studies, and assessments about the economic contribution of creative industries

The Book Sector in Morocco: current situation and prospects (2009)
UNESCO – The Creative Industries in Morocco (2009)
Morocco's New Development Model (2019)
Towards a New Development Model (2020)

National plan or strategy supporting creative industries

Sector Plan of the Ministry of Culture (2017)
New Development Model for Morocco (2019)
Program to support the cultural industries sector signed between the Ministry of Culture, Youth and Sports, professional group of banks, the General Confederation of Moroccan Companies, Ministry of Economy and Finance and the Ministry of Work (2020)

Example(s) of specific policies supporting creative industries

Establishing new legislations for cultural industries

Example(s) of COVID-19 policy measures targeting the creative economy

Exceptional financial support to actors, artists and enterprises working in cultural industries, by the Ministry of Culture
Preserving the income of employees in CClS
Creation of a special emergency fund to support professionals in the CClS, by the FICC

Myanmar

Creative industries identified as priority in terms of their international trade potential

Culture; advertising; television; radio; film; animation; video; advertising; music; culinary; printing, book publishing; arts; dancing; photography; crafts; intellectual property

Ministry/agency with overall responsibility for cultural and creative industries

Myanmar does not have a government ministry or national agency with specific overall responsibility for the cultural and creative industries.

Ministry of Investment and Foreign Economic: registers companies and issues investment approval

Relation Department: regulates the cultural and related industries

Ministry of Religious and Cultural: regulates art and cultural industries

Ministry of Information: regulates micro, small and medium enterprises/Human resource development

Ministry of Education: promotes research and development for innovation

State and Regions Development Committee: registers businesses

Responsible agencies for specific creative industries

Ministry of Religious Affairs and Culture: culture

Ministry of Information: advertising; television; radio

Ministry of Commerce: intellectual property

Ministry of Hotels and Tourism: culinary

Myanmar Motion Picture Organization (MMPO): film; animation; video; advertising

Myanmar Music Association (MMA): music

Myanmar Performance Right Organization: performing arts

Myanmar Photographers Association (MPA): photography

Myanmar Publishers and Book Sellers Association (MPBA): publishing

Myanmar Arts and Crafts Association (MACA): crafts

Art and Traditional Department: art; dancing

Surveys, studies, and assessments about the economic contribution of creative industries

Growing Through Manufacturing: Myanmar's Industry Transformation (2014)

ICT development for Innovation Growth of Myanmar (2015)

Myanmar Micro, Small and Medium enterprises Survey (2017)

Innovative and Research Skills for Knowledge Based Industries in Myanmar: Current Status and Recommendation (2018)

**National plan or strategy supporting creative industries**

National Export Strategy for handicrafts (2020–2025)
E-commerce Guideline
Myanmar 4.0
Digital Economic Development Committee's Planning for innovative industry that related to IT

Example(s) of specific policies supporting creative industries

Implementing a sustainable development plan

Example(s) of COVID-19 policy measures targeting the creative economy

Establishing a COVID-19 Economic Relief Plan
Establishing the Myanmar Economic Recovery and Reform Plan

Nicaragua

Creative industries identified as priority in terms of their international trade potential

Media; content software; publications; books; cinema; radio; television; cultural tourism; sports; recreation; gastronomy; arts; crafts; photography; cultural heritage; design; fashion; fishing and aquaculture; forestry; agroindustry

Ministry/agency with overall responsibility for cultural and creative industries

Directorate of Creative and Orange Economy
Nicaraguan Institute for Culture
National Cinematheque
National Commission for Creative Economy

Responsible agencies for specific creative industries

Various institutions promote and support CCI. For example:

Nicaraguan Institute of Culture (INC), National Technological Institute (INATEC), Nicaraguan Tourism Institute (INTUR), Ministry of Education (MINED), etc.: media

Municipal Mayor's Offices, Nicaraguan Institute for Municipal Development (INIFOM), Nicaraguan Tourism Institute (INTUR), Channel 6, Ministry of Youth (MINJUVE), Cinematheque National, etc.: recreation and leisure

National Network of Creative Cities: City Halls, Municipalities, Nicaraguan Institute for Municipal Development (INIFOM), Secretary of Development of the Caribbean Coast (SDCC), Nicaraguan Institute of Tourism (INTUR), Ministry of Family and Community Economy, Cooperatives, etc.: cultural tourism

Associative (MEFCCA), Nicaraguan Institute of Culture (INC), National Technological Institute (INATEC), TELCOR, MINJUVE, Ministry of Education (MINED), National Council of Universities (CNU) and Nicaraguan Institute of Communications and Post Office (TELCOR) : Crafts and Popular Art, Gastronomy, Digital Design, Music, Design

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

National Programme Creative Nicaragua
Municipal Strategic Development Plan 2018–2022
National Strategy for Creative Economy (2020)
Recreation and Entertainment Strategy for Life (2021)



Example(s) of specific policies supporting creative industries

Harmonization of actions and strategic resources to strengthen micro, small and medium-sized companies

Focus on human development that promotes the identity, social inclusion and cultural diversity of Nicaraguan individuals, families and communities

Legislation on copyrights and trademarks

Legislation on the promotion of national artistic expressions and the protection of Nicaraguan artists

Promote entrepreneurship, creativity, productivity and cultural growth

Inclusion of activities that promote the creative economy in all plans and programs at the institutional level

Example(s) of COVID-19 policy measures targeting the creative economy

Obtaining loans (BCIE, IDB and World Bank), for programs and projects for the development of creative industries and reactivation of SMEs

Inter-institutional coordination for the implementation of events to develop cultural and creative industries, innovation, tourism, gastronomy

Develop actions to promote the CCI sector to ensure biosafety protocols

Oman

Creative industries identified as priority in terms of their international trade potential

Artistic and cultural heritage; arts; design; fashion; film; photography; publishing; craftsmanship; advertising; electronic media; radio; television; software; video games, computer games; intellectual property

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture, Sports and Youth
 Ministry of Heritage and Tourism
 Ministry of Higher Education, Research and Innovation
 Sultan Qaboos University
 Ministry of Information
 Ministry of Commerce, Industry and Investment Promotion
 Ministry of Transport, Communications and Information Technology

Responsible agencies for specific creative industries

Ministry of Culture, Sports and Youth: arts, design, fashion, film, photography, publishing, artistic and cultural heritage
 Ministry of Heritage and Tourism: architectural arts and craftsmanship
 Ministry of Higher Education, Research and Innovation: research, development, knowledge and innovation
 Sultan Qaboos University: Innovation & Technology Transfer Centre
 Ministry of Information: advertising in general, electronic media, radio and television
 Ministry of Commerce, Industry and Investment Promotion: intellectual property and commercial value
 Ministry of Transport, Communications and Information Technology: computer games, software and video games

Surveys, studies, and assessments about the economic contribution of creative industries

N/A

National plan or strategy supporting creative industries

Oman vision 2040

**Example(s) of specific policies supporting creative industries**

Sustainable investment in heritage, culture, arts

Economic Diversification and Fiscal Sustainability

A system of employment, qualification, promotion and incentives that embraces efficiency and productivity, and induces initiative and innovation

A diversified, integrated, and competitive economy that embraces future foresight, innovation and entrepreneurship

Value-reinforcing curricula, mindful of Islamic principles and the Omani identity drawing inspiration from the history and heritage of Oman

Example(s) of COVID-19 policy measures targeting the creative economy

An approved set of incentives, by the Supreme Committee, to support the private sector and its workforce

Panama



Creative industries identified as priority in terms of their international trade potential

Handicrafts; music; gastronomy; audio-visual; animation; videogames

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture
National Directorate of Creative Economy

Responsible agencies for specific creative industries

National Directorate of Creative Economy, Department of Cultural and Creative Industries (CCIs)

Surveys, studies, and assessments about the economic contribution of creative industries

National Study of the CCIs of Panama (Part 1, 2020)
National Study of the CCIs of Panama (Part 2, 2020)

National plan or strategy supporting creative industries

Cultural Diplomacy Strategy (2019)

Example(s) of specific policies supporting creative industries

Legislation of Culture

Example(s) of COVID-19 policy measures targeting the creative economy

My culture at home 2.0 - The Panamanian Government, with the purpose of bringing entertainment, fun and cultural expressions to the homes of all Panamanians, launched "MiCultura en Casa 2.0" as an initiative that supports "patio artists". Another novelty offered by Mi Cultura en Casa 2.0 was the "Cantadera por Caneteras" format, shows on a mobile stage, in streets and parks, reaching communities in the interior of the country, bringing good folk music to Panamanians without them having to leave their homes

Paraguay



Creative industries identified as priority in terms of their international trade potential

Music; books; performing arts; design; cinema

Ministry/agency with overall responsibility for cultural and creative industries

National Secretariat for Culture

Responsible agencies for specific creative industries

Directorate of Cultural Economy: music and books
Creation Department: performing arts and design
National Film Institute: cinema

Surveys, studies, and assessments about the economic contribution of creative industries

Current situation of the cultural and creative industries of Paraguay (2018)

National plan or strategy supporting creative industries

N/A

Example(s) of specific policies supporting creative industries

Creation of "Tera", a digital platform for the registration of artists, managers and cultural organizations of Paraguay
Participation in IBER multilateral cooperation programs

Example(s) of COVID-19 policy measures targeting the creative economy

Culture Festival from my house
Payment of subsidies to the creative sector
Paraguay Virtual Book Fair
Live Art Virtual Festival

Peru



Creative industries identified as priority in terms of their international trade potential

Music; audio-visual; software; editorial; visual and performing arts

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture
Indecopi

Responsible agencies for specific creative industries

Directorate of Copyright: music, audio-visual, software and editorial
Directorate of Audio-visual, Phonography and New Media: audio-visual and phonography
Book and Reading Directorate: editorial

Surveys, studies, and assessments about the economic contribution of creative industries

Economic Contribution of Copyright Industries, Universidad del Pacífico commissioned by SECO (Swiss Cooperation)
Results of the project of the Satellite Account of Culture of the Andean countries (2017)
Quadrennial report on the 2005 convention (2020)
Quantifying Culture – Approach to the Culture (2020)

National plan or strategy supporting creative industries

INDECOPI REACTIVA SME program, the IP Area provides tools and support to SMEs nationwide so that they can attract capital, protect investments, diversify their assets and increase the value of their companies in the market.
National cultural policy
Recovery plan for cultural and arts industries

Example(s) of specific policies supporting creative industries

Capacity development program from the Ministry of Culture
Promote the development of public policies between entities of different levels of government.
Incentives to promote reading and books
Cultural qualifications for tax exemption
Economic incentives for culture

Example(s) of COVID-19 policy measures targeting the creative economy

Development of the national IP policy
Promote the economic reactivation of SMEs via the INDECOPI REACTIVA SME Program

Poland



Creative industries identified as priority in terms of their international trade potential

Film; music; design; culture; literature

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture, National Heritage and Sport

Responsible agencies for specific creative industries

National Film Archive, Audio-visual Institute and Polish Film Institute: film
 Institute of Music and Dance: music
 Institute of Industrial Design: design
 Adam Mickiewicz Institute: culture export; design; music
 National Culture Centre: music; design; literature

Surveys, studies, and assessments about the economic contribution of creative industries

Cultural and Creative Industries 2014–2016, Statistics Poland (2018)
 A comprehensive study of the Polish music market, Ministry of Culture and National Heritage (2019)
 The role of creative economy in Poland, Polish Economic Institute (2020)
 The Game Industry of Poland, Polish Agency for Enterprise Development (2020)

National plan or strategy supporting creative industries

Creative Industries Package in the Strategy for Responsible Development
 Strategy for Social Capital Development (Cooperation, Culture, Creativity)

Example(s) of specific policies supporting creative industries

Grant program for the creative sector

Example(s) of COVID-19 policy measures targeting the creative economy

“Anti-crisis Shield” – standstill benefits, salary reimbursements, social security contribution exemption, loans
 The Culture Online Program comprised of PLN 20 million (ca EUR 4.35 million) worth of scholarships for artists and creative industry professionals and PLN 60 million (around EUR 13 million) worth of subsidies for institutional projects
 Culture Support Fund – compensation mechanism for lost profits in the culture sector with a projected budget of circa PLN 400 million

Portugal



Creative industries identified as priority in terms of their international trade potential

Dance; cinema; audio-visual; books; cultural heritage; arts; virtual reality; artificial intelligence

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture

Responsible agencies for specific creative industries

General Directorate of Cultural Heritage: cultural heritage
 General Directorate of Books, Archives and Libraries: books
 Ministry of Culture: dance
 TNDMII – Teatro Nacional D. Maria II and TNSJ – Teatro Nacional São João: cultural creation and productions, theatre, literature
 DGARTES-General Directorate for the Arts: arts

Surveys, studies, and assessments about the economic contribution of creative industries

Cultural and creative industries in Portugal: a critical assessment of a new “agenda” for public policies (2018)
 Cultural and Creative Industries-Economic Assets which Need to be Enhanced”, Agency for Investment and Foreign Trade of Portugal (AICEP, 2019)
 Pilot project for measuring the cultural and creative sectors, Information Management Consulting Services (QMETRICS, 2021)
 National Statistics Institute: Culture, sports and recreation statistics (2022)

National plan or strategy supporting creative industries

Strategic Vision for the 2020–2030 Economic Recovery Plan for Portugal

Example(s) of specific policies supporting creative industries

European Research and Innovation Framework Program
 Support programme for translation in foreign countries from Portuguese authors
 Promotion of cinematographic and audio-visual production

Example(s) of COVID-19 policy measures targeting the creative economy

Emergency funding support lines for non-professional artistic structures, for cinema and audio-visual, music, book and museums sector
 Social and Economic Stabilization Programme
 Diverse lines of support to cultural and artistic sector and professionals

Russian Federation



Creative industries identified as priority in terms of their international trade potential

Film industry; animation; visual arts; publishing; design; fashion; architecture; intellectual property; crafts; advertising; publishing; music; videogaming

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture of the Russian Federation
 Ministry of Industry and Trade of the Russian Federation
 Ministry of Economic Development of the Russian Federation
 Ministry for Digital Development, Communications and Mass Media of the Russian Federation
 Ministry of Sport of the Russian Federation
 Federal Antimonopoly Service
 Russian Federal Service for Intellectual Property
 Ministry of Education and Science of the Russian Federation

Responsible agencies for specific creative industries

Russian State Film Fund GOSFILMOFOND, Russian Cinema ROSKINO: film
 Union of Russian Artists, Russian Academy of Arts, Contemporary Art Galleries Association: visual arts
 Association of Writers and Publishers Unions of Russia: publishing
 Union of Designers of Russia, Institute for Fashion Industry Development Beinopen, National Fashion House: design and fashion
 Union of Russian Architects: architecture
 Association of Copyright Holders, IP Federation: intellectual property
 National Art Crafts of Russia, Crafts Promotion Fund RUSTRENDS: crafts
 Russian Music Union, Union of Russian Composers: music

Surveys, studies, and assessments about the economic contribution of creative industries

The Impact of Creative Industries on the Russian Economy, Agency for Strategic Initiatives (2020)
 Atlas of Creative Industries, City Competence Centre of ASI (2021)
 Development of Creative Industries in Russia: main figures, Institute for Statistical Studies and Economics of Knowledge (2021)
 Assessment of Contribution of Creative Businesses to the Economy of Russia, Creative Industries Federation (2021)

Russian Federation (continued)

National plan or strategy supporting creative industries

Russian Cultural Policy Strategy until 2030
 National Project “Culture”
 National Concept of Creative Industries Development
 National Concept of the Cinematography Development
 Strategy of development of musical instrument and sound equipment industry
 National Action Strategy for Women 2017–2022
 Russian Services Export Development Strategy until 2025
 Strategy for the Development of Services Exports until 2025
 National Goals of Russian Economic Development until 2030

Example(s) of specific policies supporting creative industries

Creating temporary jobs; retraining the unemployed; benefits for citizens who have lost their jobs; credit holidays; rent delay; concessional lending; tax and credit holidays; reduction of insurance premiums; employment support loans and others
 Support set of measures for SMEs: salary grant; tax delays; concessional lending, non-interest-bearing loans; loan and rent deferrals; suspension of tax inspection, debt and penalty recovery, bankruptcy; reducing the requirements for securing state contracts
 Subsidies to preserve production in regard with the cancellation of exhibitions and fairs

Example(s) of COVID-19 policy measures targeting the creative economy

Subsidies to organizations affected by restrictive measures to prevent the coronavirus spread
 Support for cultural institutions whose activities have been suspended due to COVID-19
 COVID-19 prevention subsidies

Slovenia



Creative industries identified as priority in terms of their international trade potential

Film; music; book; architecture; design; cultural heritage

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture

Responsible agencies for specific creative industries

Centre For Creativity (CzK): architecture, advertising, design, visual arts, cultural heritage, archives and libraries, books and publishing, cultural and art education, music, performing and intermedia arts, media, software and games, film and audio-visual activities, cultural tourism

Slovenian Film Center, the Public Agency of the Republic of Slovenia (Slovenski Filmski Center, Javna Agencija Republike Slovenije): film

Slovenian Music Information Centre (SIGIC): music

Slovenian Book Agency (JAK): book

Chamber of Architecture and Spatial Planning of Slovenia (ZAPS): architecture

Designers Society of Slovenia (DOS): design

ICOM Slovenia, Skupnosti muzejev Slovenije (SMS), Slovensko muzejsko društvo (SMD): cultural heritage

Surveys, studies, and assessments about the economic contribution of creative industries

State of Art of the CCI Sector in Ljubljana Urban Region (2017)

Statistical analysis of the state of the cultural and creative sector in Slovenia 2008–2017 (2020)

National plan or strategy supporting creative industries

National plan proposal in preparation by Centre For Creativity

Example(s) of specific policies supporting creative industries

Investments for creative hubs

Public grants

Example(s) of COVID-19 policy measures targeting the creative economy

General (horizontal) measures

Trinidad and Tobago



Creative industries identified as priority in terms of their international trade potential

Film, fashion; music; dance, theatre; heritage; festivals

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Tourism, Culture, and the Arts
Ministry of Trade and Industry

Responsible agencies for specific creative industries

Ministry of Trade and Industry: film, fashion, and music
Ministry of Tourism, Culture and the Arts: dance, theatre, heritage, and festivals
The Trinidad and Tobago Film Company Limited (FilmTT): film

Surveys, studies, and assessments about the economic contribution of creative industries

The Economic Contribution of Copyright-Based Industries in Trinidad and Tobago with WIPO (2012)
Strategic Plan for the Fashion Industry of Trinidad and Tobago (2015)

National plan or strategy supporting creative industries

Strategic Plan for the Music Industry of Trinidad and Tobago 2017–2022
Strategic Plan for the Film Industry of Trinidad and Tobago 2018–2023

Example(s) of specific policies supporting creative industries

National Cultural Policy of Trinidad and Tobago

Example(s) of COVID-19 policy measures targeting the creative economy

Cultural relief grant

Turkey



Creative industries identified as priority in terms of their international trade potential

Cinema; fine arts; visual arts; theatre; music; opera and ballet; publishing; software and informatics

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture and Tourism

Responsible agencies for specific creative industries

Directorate General for Copyright: cultural industries
 Directorate General for Cinema: cinema
 Directorate General for Fine Arts/Department of Visual Arts: arts
 Department of Music and Performing Arts: theatre, music
 Directorate General for State Opera and Ballet: opera and ballet
 Directorate General for Libraries and Publications: publications

Surveys, studies, and assessments about the economic contribution of creative industries

Study On the Economic Contribution of Culture/Copyright based Industries in Turkey (2020)

National plan or strategy supporting creative industries

11th Development Plan

Example(s) of specific policies supporting creative industries

Special support programs for copyright-based cultural industries

Example(s) of COVID-19 policy measures targeting the creative economy

Tax reductions and social rights in the field of culture and arts
 Legally secured employment for temporary employed artists
 Increasing financial support allocated to private theatres, cinemas,
 Legislation of the "Culture Investment and Initiative Certificate" applied for culture and arts centres
 Music industry support program
 Strengthening the intellectual property system - a total of TL 60 million financial support was provided to approximately 250 projects and copyright collective management organizations in the period of January–November 2020
 Digitalization in the fields of culture and art - for example, Turkey's Culture Portal, a broad digital platform and the Mobile Art digital application

United Arab Emirates



Creative industries identified as priority in terms of their international trade potential

Yet to be identified. Industries can include cultural and creative industries; arts; cultural heritage; youth; media

Ministry/agency with overall responsibility for cultural and creative industries

Ministry of Culture and Youth

Responsible agencies for specific creative industries

Cultural and Creative Industries Sector: creative industries

Surveys, studies, and assessments about the economic contribution of creative industries

Creative Economy in the UAE, Federal Competitiveness and Statistics Center (2020)

National plan or strategy supporting creative industries

UAE 10-year Cultural and Creative Industries Strategy

Example(s) of specific policies supporting creative industries

Talent Visa - Granting a 10-year visa to cultural professionals and talents to reside and work in the UAE

UAE Culture Agenda 2031 – the first country-level strategy for the cultural sector in the UAE, with a roadmap of 7 strategic objectives and 75 strategic initiatives from 2018 until 2031

Talent support policy for the cultural sector - framework to discover, support, train, encourage and attract cultural talent

Abu Dhabi Culture and Creative Industries Strategy 2020–2024

Culture Plan for Dubai – by Dubai Culture and Arts Authority: a six year strategic roadmap for Dubai, outlining strategic goals for the creative sector between 2020 and 2026.

Example(s) of COVID-19 policy measures targeting the creative economy

Economic stimulus packages

Business relief packages

Subsidized rent and financial incentives

Exemption and subsidized licensing fees and taxes

Discount on new residency visas

Exemptions from delay fines and downgrade fees on visas

