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CLUSTERS IN CULTURAL AND CREATIVE INDUSTRIES IN EUROPE – SPECIALISATION AND ACTIVITIES

Abstract. The paper presents the characteristics of clusters and cluster organizations operating in cultural and creative industries. To present the sector in terms of sales and employment values the statistical data were analysed, using different approaches to determining the scope of the creative sector (Eurostat, International Confederation of Societies of Authors and Composers as well as European Cluster Observatory). The data are compiled with the number of clusters in the EU countries. Presented results shows the need for continues monitoring the cultural and creative sectors to adapt national and regional innovation policy and coordinate the cooperation between creative industries and other sectors of the national/regional economy.

Keywords: clusters, cluster organizations, creative and cultural industries.

1. Introduction

Nowadays, we are witnessing a growing role of cooperation between societies in different areas of activity, also in the area of running business. Clusters, regarded as geographical agglomerations of cooperating independent institutions, are good examples of this phenomenon. Among numerous practical approaches to cluster analysis, we might distinguish economic and geographical trend, which concentrates on presenting quantitative and territorial characteristics of clusters[1] as well as a trend dominant in management sciences, which give answers to questions related to benefits and advantages obtained by cluster entities thanks to cooperation. A complete picture of the processes in cluster functioning combines these two approaches: economic and geographical approach, which uses statistical data, indicates the sectors' potential in specific specializations defined by such meters as: the number of enterprises, the number of persons employed, the value of production. On the other hand, strategic approach formulates mission and objectives of cluster organizations, their activity and cooperation on pro-

[1] Ketels Ch., Protsiv S.: Methodology and Findings Report for a Cluster Mapping of Related Sectors. European Cluster Observatory 2014.

jects. In this paper, authors present creative clusters in Europe combining these approaches. The conducted research was aimed at answering the following questions:

– What is the level of development of the creative sector in EU?
– Which regions in Poland and Europe were indicated by creative industries as smart specializations?
– What is the condition of creative clusters in Europe?

Studies and practical examples were drawn from the obtained research results, conducted in creative clusters as part of the research project *Models of knowledge management in networks and clusters of creative industries in Poland and EU countries*.

2. Importance of the cultural and creative industries in Europe

Creative industry has become a significant power transforming contemporary world. It is one of the most dynamically developing sectors of economy in the world, not only in terms of generated revenues, but also taking into account job creation and export of goods. Human creativity and innovation, both on individual and team level, are the main factors in these branches, and have become true wealth of nations in the twenty first century. This sector is based on creative, innovative and talent-generated actions of creators of broadly defined art, media and design. For these actions to take place, the necessary factor is the presence of multidisciplinary and extensive knowledge of the sector creators, thanks to which goods and services with added value are created and distributed (e.g. high quality, attractive and informed form) A systematic definition and mapping of what creative sectors are and what their value is took place in Great Britain in 1997. The notion of creative industry is defined by DCMC as: ' …actions which result from individual creativity, ability and talent, have the potential to create wealth and work over generations and explore intellectual property'[2]. Creative industries were defined in 2005 by UNESCO as "activities, goods and services which (…) embody or convey cultural expressions, irrespective of the commercial value they may have"[3]. In the broadest sense '…creative industries are those, which were established on the basis of copyrights, patents, projects or commercial brand names. The establishment of creative industries involves commercialization of intellectual property relying on market and non-market cultural and scientific values, more generally on talent and knowledge, individual creativity and experimenting'[4]. The development of creative industries does not, however, have a life of its

[2] Report, Creative industries in Berlin. Development and Potential, Senate Department for Urban Development, Berlin 2008.
[3] Convention on the Protection and Promotion of the Diversity of Cultural Expressions, UNESCO, 2005.
[4] Klasik A.: Building and promotion of creative conurbations „AE Forum" nr 27, Katowice 2008.

own. Indeed, it contributes to the occurrence of numerous phenomena, which take place in economic or social environment, including the following[5]:

- innovation growth – one key feature that distinguishes this industry form others is the fact that it is more innovative. Innovation and creativity constitute a certain closed process: creativity stimulates innovation, and innovation leads to changes;
- accumulation of profits, increased GNP in particular countries, job creation, reinforcement of national and regional identity leading to growth in life quality of the inhabitants through contribution to innovation;
- constant impact on consumers, citizens, are presence in every aspect of our life, 'all people irrespective of place of residence, consume products: while learning, working, spending their free time or during leisure time [6];
- they enhance people's lives; shape distinctive characteristics in particular societies, constitute a means of communication between cultures and societies;
- they are characterized by creative interpretation and knowledge implementation, readiness to adapt new technologies and business models as well as willingness for partnership in business;
- they become indispensable for society's infrastructure;
- they have influence on the future of our planet – creative sectors' advantage over other branches of economy consists in the fact that they are able to create something valuable out of nothing, 'out of thin air'[7]. On the other hand, creative sectors affect natural resources and the environment.

Studies carried out around the world classify creative sector among emerging industries which can be understood as either new industrial sectors or existing industrial sectors that are evolving or merging into new industries. They are defined as "the establishment of an entirely new industrial value chain, or the radical reconfiguration of an existing one, driven by a disruptive idea (or convergence of ideas), leading to turning these ideas / opportunities into new products / services with higher added value"[8].

The creative sector is not only included in emerging sectors, but it also plays a key role in the process of 'entrepreneurial discovery', which is the central motive in the smart specialization concept. Smart specialization is a key challenge for the EU 2020 strategy and means identifying the unique characteristics and assets of each country and region, highlighting each region's competitive advantages, and rallying regional stakeholders and resources around an excellence-driven vision of their future. It also means strengthening regional innovation sys-

[5] Based on: Newbigin J.: The Creative Economy: An Introductory Guide. British Council's Creative And Cultural Economy Series, London 2010, p. 18-21; Higgs P., Cunningham S., Bakshi H: Beyond the creative industries: Mapping the creative economy in the United Kingdom. NESTA, London, 2009.

[6] Speech by E. dos Santos, head of the program on creative industry in UNTAD.

[7] Leadbeater Ch.: Living on Thin Air, Penguin Books Ltd, 2000.

[8] Heffernan P., Phaal R.: The emergence of new industries, University of Cambridge Institute for Manufacturing Emerging Industries Programme, http://www2.ifm.eng.cam.ac.uk/service/events/info/thursday_slides/091105phaal.pdf

tems, maximising knowledge flows and spreading the benefits of innovation throughout the entire regional economy.

3. Contemporary understanding of the cluster

Clusters are a specific form of network that has increasingly gained importance in recent years. Previous cluster literature and cluster research has primarily concentrated on the economic advantages of clusters and focused on productivity and innovation for the enhancement of competitiveness. In addition, extensive research mainly has concerned internal processes and social networks between cluster partners and local institutions. Over the past years, the 'knowledge economy' led to a more broadened perspective in which the external embeddedness in global production networks is increasingly seen as a substantial factor for the performance of clusters.

There are many definitions of term 'cluster', and according to the approach by Gordon and McCann[9], Iammarino and McCann[10] and Knop[11] the definitions of a cluster can be ordered and understood as:

– *A traditional agglomeration* (concentration) is a concentration of industries where a significant role is played by administration as well as local and regional authorities. The job market is a specific reflection of the opportunities to exploit economies of scale and an indication that external effects are the result of both the activity of local market and the spillover effects. Most of the existing theories of clusters activity focus on external effects and the resulting agglomeration economies[12].
– *An industrial complex* is a cluster of companies focused on a specific territory, based on specific (special) relationships in terms of sales and purchases of companies that seek to reduce transaction costs and improve competitiveness[13].

[9] Gordon I.E., McCann P.: Innovation, Agglomeration and Regional Development. "Journal of Economic Geography", 5, 2005, p. 523-543.
[10] Iammarino S., McCann P.: The Structure and Evolution of Industrial Clusters: Transactions, Technology and Knowledge Spillovers. „Research Policy", 35, 2006, p. 1018-1036.
[11] Knop L.: Zarządzanie klastrem. Koncepcje, strategie, modele. Wydawnictwo Politechniki Śląskiej, Gliwice 2013, s. 25-33.
[12] Marshall A.: Principles of Economics. Macmillan, London, UK 1890, 1930 (1986 edition); Perroux F.: Economic Space: Theory and Applications. "The Quarterly Journal of Economics", 64, 1950, p. 89-104; Krugman P.: Geography and Trade. MA: MIT Press, Cambridge, UK 1991; Cooke P.: Regional Innovation Systems, Clusters, and the Knowledge Economy. "Industrial and Corporate Change Journal", 10 (4), 2001, p. 945-974.
[13] Miles R.E, Snow Ch.C.: Causes of Failure in Network Organizations. „California Management Review", Summer, 1992, p. 53-72; Porter M.E.: The competitive advantage of nations. New York: Free Press, USA, 1990; Enright M.: Regional Clusters and Economic Development: A Research Agenda, [in:] Staber U., Schaefer N.V., Sharma B. (eds.): „Business Network. Prospects for Regional Development". de Gruyter, Berlin, Germany 1996, p. 191; Rosenfeld S.A.: Bringing Business Clusters into the Mainstream of Economic Development. "European Planning Studies", 5 (1), 1997, p. 3-23.

– *A social network* is a model of a 'club' focused on social bonds and trust which facilitate cooperation and innovation; it underlines the activity of different organisations with particular emphasis on civil society[14].
– *A knowledge hub* is an ‚expert' model based on cooperation between academic and research entities with business units aimed at creating new knowledge and revolutionary innovations[15].

Contemporary cluster is a combination of the presented definitions. Each conceptualization (regional, industrial, network and knowledge-based) characterizes the functioning clusters. Furthermore based on an international expert panel composed of industry, science and cluster managers, twelve global mega trends have been identified that are seen as the fundamental catalysts for growth in markets and clusters[16]:

– Related to the nature of innovation: changes in innovation dynamics (such as more dispersed knowledge, sources of innovation etc.); changes in entrepreneurship culture (role of entrepreneurs, use of crowd-funding etc.); changes of geo-economical dynamics;
– Related to advancements in information technologies: consumerisation, proliferation and ubiquity of IT; cross-linkage of subjects & objects (Internet of Things); impact of social media; convergence of products, devices and services; big data;
– Related to changes in consumer behaviours and expectations: personalisation of products & services; immediate availability of products & services; shortening of lifetime cycles; carbon foot-print reduction.

The article discusses the position of creative clusters in the development of EU, through combining the notions of creative sector development and contemporary understanding of clusters. It is assumed that, a creative cluster is a peculiar type of cluster, which not only concerns a particular specialization (creative sectors) but is mainly distinguished by the dominance of activity connected with creativity. De Propris and Hypponen in their definition of a creative cluster indicate its positive features and functions it should perform. It is assumed by the authors that 'Creative cluster is a place that brings together:

[14] Castells M., Hall P.: Technopoles of the World: The Making of the Twenty-First-Century Industrial Complexes. Rutledge, London, UK, 1994; Chow W., Chan L.S.: Social Network, Social Trust and Shared Goals in Organizational Knowledge Sharing. "Information and Management", 45, 2008, p. 458-465; Stachowicz J.: Strategic Navigation of Social Capital on the Regional Level, [in] Stachowicz J. (ed.): Intellectual Capital Management in Regional Pro-Innovative Networks. Akademicka Oficyna Wydawnicza EXIT, Warszawa, Poland, 2006, s. 13-24.

[15] Dahl M.S., Pedersen Ch.: Knowledge Flows through Informal Contacts in Industrial Clusters: Myth or Reality? "Research Policy", 33, 2004, p. 1673-1686; Maskell P.: Towards a Knowledge-Based Theory of the Geographical Cluster. "Industrial and Corporate Change Journal", 10, 2001, p. 921-943; Kogut B.: The Network as Knowledge: Generative Rules and the Emergence of Structure. "Strategic Management Journal", 21, 2000, p. 405-425.

[16] Izsak K., zu Köcker G.M.: European Cluster Trends. Executive Summary. Report, European Cluster Observatory, 2015, p. 2-3.

1. A community of 'creative people' who share an interest in novelty but not necessarily in the same subject.
2. A catalysing place where people, relationships, ideas and talents can spark each other.
3. An environment that offers diversity, stimuli and freedom of expression.
4. A thick, open and ever-changing network of inter-personal exchanges that nurture individuals' uniqueness and identity."[17]

This article as well as other studies conducted by the same authors adopt the assumption that a creative cluster is a '(…) a group of cooperating organizations and individuals originating from local and regional societies, representing business, science, the arts, culture, education, health, entertainment and leisure activities. The cluster dynamics come from the creation of a regional identity, the innovative utilization of resources and a talent search with the protection and development of local and regional values. The creative clusters are the reservoir of creative resources and skills for other clusters and innovative environments."[18].

4. Creative clusters in Europe

4.1. Materials and Methods

The conducted research gave response to questions posed in the introduction to this article:

- what is the level of creative sector development tin EU? Research based on the following data: Eurostat, International Confederation of Societies of Authors and Composers as well as European Cluster Observatory.
- in which regions in Europe and Poland creative industries were designated as smart specialization? Research in Europe was based on data contained in platform S3[19], encompassing data on the development of administrative units NUTS 1 and NUTS 2[20] and on national, regional innovation strategies indicating smart specializations;

[17] De Propris L., Hypponen L.: Creative Clusters and Governance: the Dominance of the Hollywood Film Cluster, [in:] Ph. Cooke, L. Lazzeretti (eds.): Creative Cities, Cultural Clusters and Local Economic Development. Cheltenham: Edward Elgar, p. 258-286.

[18] Knop L., Stachowicz J., Krannich M., Olko S.: Modele zarządzania klastrami. Wybrane przykłady. Wydawnictwo Politechniki Śląskiej, Gliwice 2013, s. 24.

[19] Smart Specialisation Platform – platform governed by a team of representatives of several institutions of European Commission; counseling institution supporting EU regions in determining their development potential in the area of innovation.

[20] Administrative units are e.g. in Germany NUTS 1 (Lands), in Poland NUTS 2 (voivodeships). Regulation (EC) no 1888/2005, Ordinance (WE) no 1888/2005 of the European Parliament and Council of 26th October 2005 changing regulation (EC) no 1059/2003 on the establishment of common classification of NUTS due to the accession of the Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia and Slovakia to the European Union.

– what is the condition of clusters in Europe? Research based on the data from European Cluster Observatory; European Cluster Collaboration Platform; European Secretariat of Cluster Analysis; European Cluster Excellence Initiative.

Consequently, creative clusters in Europe are presented in the light of creative cluster development and their significance in regional policy. Research on creative clusters was based on the assumption that a cluster has a cluster system. *Cluster organizations* are the legal entities that support the strengthening of collaboration, networking and learning in clusters, and act as innovation support providers by providing or channeling specialized and customized business support services to stimulate innovation activities, especially in SMEs. They are usually the actors that facilitate strategic partnering across clusters. Such approach leads to a relatively objective inventory of creative clusters in Europe.

4.2. Results and Discussion

Contemporary economic analysis on clusters and sectors particularly have regard to value flow between sectors and components necessary for the creation of final products: both goods and services. The significance of creative sector in economy results not only from its economic value, but also the impact on increasing the value of other sectors[21] and regional development. Beyond the UNESCO definition, we have used NACE 2.0 classification and a sector-based approach in order to consider the specifics of each industry. Based on International Confederation of Societies of Authors and Composers reports we analyzed 11 sectors to provide an overview of the growth drivers and key challenges to each: Advertising, Architecture, Visual Arts, Performing Arts, TV, Radio, Music, Books, Gaming, Movies, and Newspapers and Magazines. Conversely, according to the classification adopted by European Cluster Observatory[22] CCI clusters include 42 classes, defined by NACE 2.0 – a leading classification of economic activity in EU, which additionally allows to determine specializations within broadly defined CCI. CCI involves activity connected with creation, sharing, sale and preservation of cultural products. Primary artistic activity and design covers the whole 91 division in section R – arts, entertainment and creation as well as chosen classes section M – Professional, scientific and technical activities such as 71 – architecture, 73 – advertising, and especially section 74.10 - specialized design activities. A significant part of providing the values of creativity and culture is included in section C – manufacturing, related to: printing (division 18), manufacturing magnetic and optical media (class 26.80), and also class 32.20 – manufacture musical instruments. Part of the CCI sector responsible for retailing is included in section G and concerns group 47.6 – retail sale of cultural and recreation goods in specialized stores.

[21] Szultka S. (ed.): Creative Chain. Connections between the creative sector and culture in Poland. Institute for Market Economics, Gdańsk 2014.

[22] Ketels Ch., Protsiv S.: op.cit., p. 11.

The most dynamically developing area of CCI, especially in terms of exploitation of digital technologies, is the area included in section I – information and communication. It encompasses creative subsector of ICT sector: creation and release of software and computer games, online portals activity (sections: 58.21, 58.29, 62.01 and 63.12), publishing, media production, TV and radio programs broadcasting. Storage and provision of cultural products as well as values of national heritage are defined in division 91 – libraries, archives and museums activities. A small area of CCI is included in section P (education) and relates to cultural education (class 85.52).

According to the report "Cultural times. The first global map of cultural and creative industries" CCI generate US$2,250b of revenues and 29.5 million jobs Worldwide. Within the total, the top three earners are television (US$477b), visual arts (US$391b), and newspapers and magazines (US$354b). With 29.5 million jobs, CCI employ 1% of the world's active population. The top three employers are visual arts (6.73m), books (3.67m) and music (3.98m). Europe's CCI is rooted in its history: the region enjoys a unique concentration of heritage and arts institutions. Europe is a world-class cultural destination attracting 52% of international tourists. Seven of the 10 most visited museums in the world are European (three in Paris, two in London) and 30 of the 69 UNESCO "Creative Cities" are European.

Due to various approaches to the understanding of CCI, the research conducted on the dynamics of creative industries development lack comparable data. Analysis, which might be regarded as reliable and comparable, is the research carried out by International Confederation of Societies of Authors and Composers, which compares 11 sectors of CCI. It was assumed, that the studies would be conducted periodically, yet altogether the statements were made on two years, 2012 and 2013 (the research on the year 2013 was finished in 2015).

Europe after Asia is the second largest CCI market 598,7 bln EUR (in 2013 – 554,8 bln EUR of revenues - 32% of the CCI revenues worldwide), 8.2 million jobs (26% of total CCI jobs) – see Fig. 1.

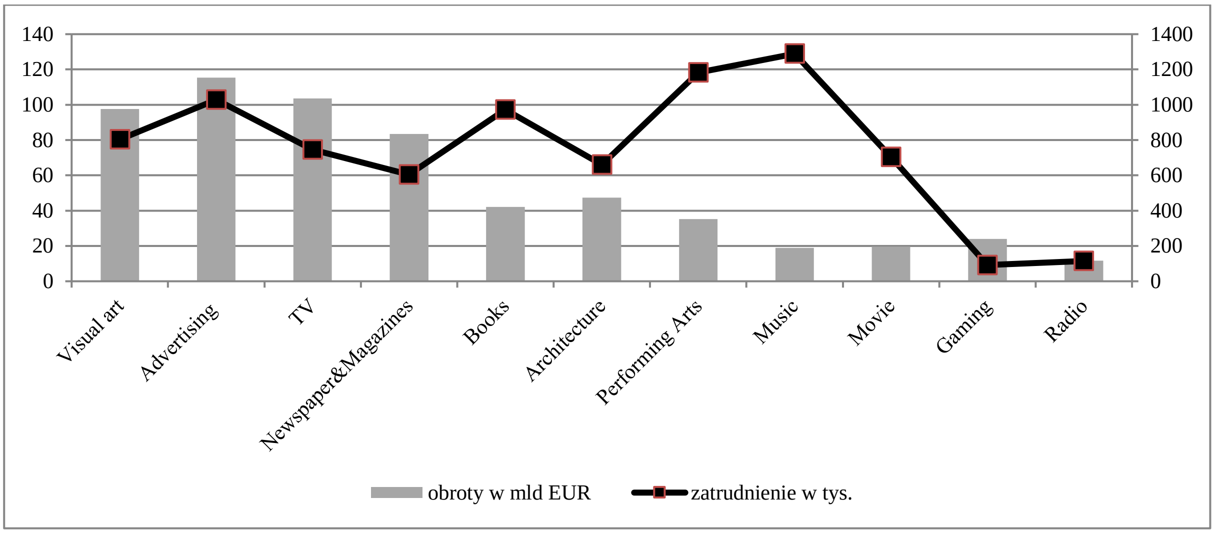

Fig. 1. Revenues and employment in subsectors of CCI in Europe (data for 2013)
Source: CISAC Global Collection Report 2016.

The most active areas within this industry in 2013 were: advertising, TV, visual arts, newspaper and magazines. The dominant areas, taking into account employment, in the creative industries sectors in Europe are music, performing arts, advertising and books. It is a well-structured ecosystem with the presence of big CCI players (WPP Group, Pearson, Axel Springer, Universal, Ubisoft). Figures 2 and 3 present changes over the years 2012-2013.

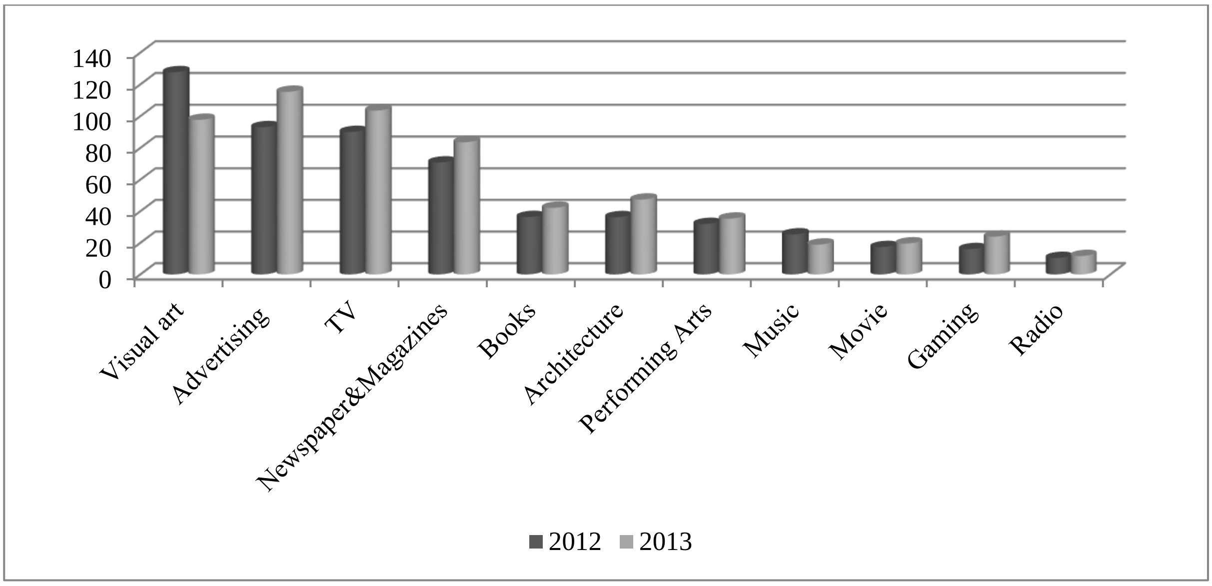

Fig. 2. Revenues changes (2012 – 2013) in European CCI
Source: CISAC Global Collection Report 2016.

The most dynamically developing sector are video games with a 50% growth of revenues, 30% growth was noted in architecture, advertising with 23% and double-digit growth in: newspaper and magazines, books, TV, film and radio. A decrease was observed in the sectors of visual art and music.

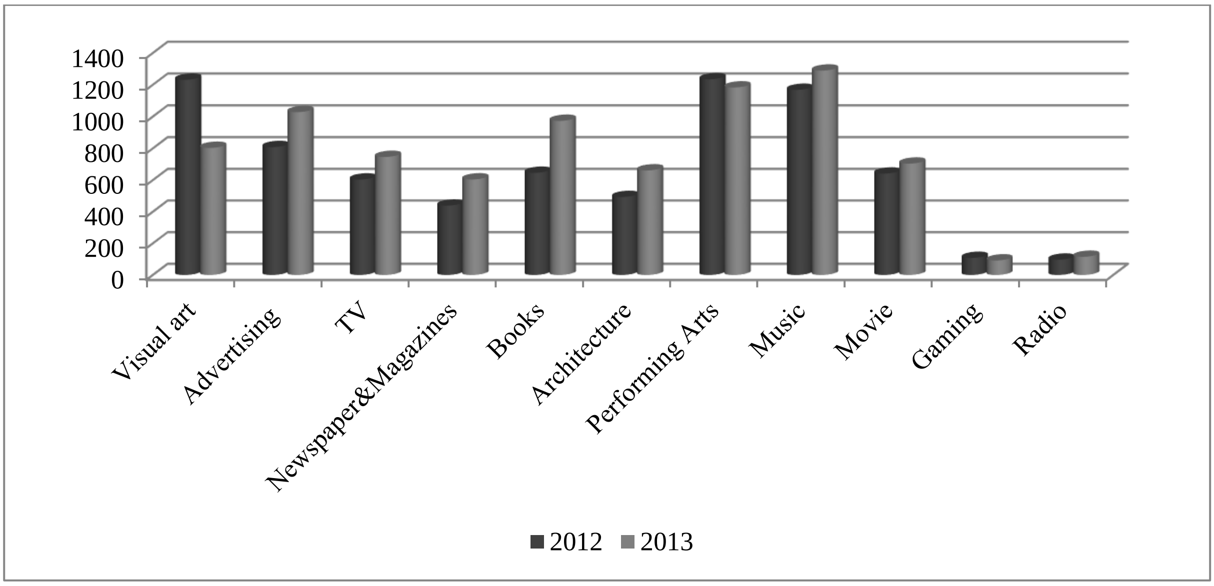

Fig. 3. Employment changes (2012 – 2013) in european CCI
Source: CISAC Global Collection Report 2016.

The music and performing art sectors are the biggest generators of employment. Employment in CCI has increased by 10% in EU, by 50% in the books sector, 37% in newspaper and magazines, 34% in architecture. A considerable drop was observed in visual arts (35%) and gaming (15%).

The development of creative industries was acknowledged in chosen regional specializations in EU countries[23]. Over the past few years regions in Europe and countries from EU have identified[24] smart specializations, which are an effect of implementation of the assumptions behind smart development[25]. Smart specializations are registered on Platform S3. On the basis of this data, a preliminary analysis of regions, which indicated creative industries as smart specializations, was carried out. Five EU countries point to CCI as national specializations, i.e. Bulgaria, Denmark, Poland, Portugal, Slovenia. 47 out of 276 regions (NUTS 2) identified creative industries as regional specializations with the biggest number in Italy, where out of 21 regions, 11 noted development of this specialization. The dominant areas are fashion, design, textile industry, art, cultural heritage, TV, music production. In Poland, two regions (małopolska, woj. kujawsko-pomorskie) concentrate their development around CCI.

Considering the assumption that, within the presented classification of creative clusters (fig. 1), software and games belong to creative sectors, we might actually include additional 68 regions (ICT specializations, 12 regions in Poland) to the group of 47 mentioned above. This number, together with textile industry, design and fashion (11) gives the creative industry in Europe a strong first position among chosen specializations. Unfortunately, due to unspecified criteria of differentiating creative sectors, the whole ICT sector cannot be included in this group. However, irrespective of this fact, creative sector as well as its dynamics, is notable among smart specializations in European countries.

Concentration of activities in smart specializations is also reflected in creative clusters. Table 1 presents a brief characteristics of creative clusters in selected European countries, where at least one cluster organization was identified. Such a criterion of distinguishing clusters is a manifestation of activity in an environment representing the creative sector. For this reason, the classification lacks countries such as: Belgium, Netherlands, Luxembourg and many new members of EU: Lithuania, Latvia, Estonia, the Czech Republic and Slovakia. The

[23] It relies on a strong but declining public support. Governments in the EU28 devoted nearly US$ 68.6b of spending to CCI. Since 2008, public spending on CCI has fallen by 1% annually on average.

[24] The process of identification is based on four main approaches: data and technology analysis, in general 'inventory' of studies and patents as well as R&D area or the level of employment in these areas; industrial specializations, based on indicators of critical mass of industrial specializations in the region; competitive selection based on analysis of entrepreneurs activity, including clusters: market selection concerning regions with unrecognized competitive advantage and conducted experiments. [Foray D. at all: Guide to Research and Innovation Strategies for Smart Specializations (RIS 3), EU, 2012].

[25] Europe 2020 puts forward three mutually reinforcing priorities: – Smart growth: developing an economy based on knowledge and innovation. – Sustainable growth: promoting a more resource efficient, greener and more competitive economy. – Inclusive growth: fostering a high-employment economy delivering social and territorial cohesion. Europe 2020. A European strategy for smart, sustainable and inclusive growth. European Commission, 2010, p. 3.

analysis was based on the data from European Cluster Observatory complemented by Eurostat's data.

Table 1

Number of cluster organizations and employment in cultural and creative industries in selected European countries

Country	European Secretariat for Cluster Analysis	Cluster Observatory, Eurostat			
		Number of cluster organizations in the sector	Number of employees in the sector[a] [thousands]	Number of enterprises in the sector[a]	Export of cultural goods[b] [thousands EUR]
Austria	1	2	110	27 264	1 192 207
Belgium	3				
Croatia		1	37,5	9 978	82 834
Czech Republic	2				
Denmark	10	3	81	17 957	510 117
Finland	2	1	75,5	18 886	220 272
France	11	2	562	94 372	3 452 521
Germany	19	2	946	88 856	3 612 843
Greece		1	135	nd	181 144
Hungary		1	78	nd	110 655
Ireland		1	48,5	9 118	354 967
Italy		5	665	250 758	1 277 305
Norway		5	71	21 281	441 700
Poland		2	249	159 443	707 468
Portugal		6	120	56 559	225 891
Romania		1	129	27 329	153 963
Serbia		1	45	15 713	nd
Spain	16	6	632	211 100	970 029
Sweden		2	139	111 889	618 205
Switzerland	0	1	163	35 233	2 441 332
United Kingdom	2	2	1 135,5	nd	5 364 736

Source: [a]clusterobservatory – data for the 2010 or 2011, [b]eurostat – data for 2014 (http://ec.europa.eu/eurostat/web/culture/international-trade/data/database).

According to the European Cluster Observatory in Europe, there are 40 clusters in the creative industries, the analysis by European Secretariat for Cluster Analysis point out 66 creative clusters and clustercollaboration.eu gives the number of 108. Similarly to the situation with defining and identifying CCI, problems with determining the number of creative clusters are encountered. Project research has shown that a credible source of information is the cluster-collaboration platform. Information that relies on the information provided by the coordinators of the clusters, who keep it updated, which makes it a reliable and up-to-date source of information.

Vast majority of creative clusters are non-profit organizations or associations (there are formal differences in EU countries in this type of organization). A curiosity is the Belgian cluster screen.brussels, a public entity in which members – multimedia sector companies - are ‘registered’. Such an organizational form gives its activity the greatest credibility. The dominant specializations of creative clusters are ICT and multimedia. Large creative clusters in France, Spain and Italy combine art and technology in creating new products, services and digital content. A new phenomenon to be observed is the use of the value of cultural and natural heritage to create the value of cluster products. European creative clusters are characterized by the participation, in addition to small and medium-sized, also large enterprises. For example, in Cap Digital, there are 63 large companies, in the audiovisual cluster in Galicia 3 companies for 33 members. Large enterprises support the cluster through their resources (including knowledge resources), attracting smaller entities, yet also benefiting from their capabilities with a skillful collaboration strategy. The presence of large members in the cluster can be a milestone for their development, beneficial for all members of the cluster.

The experiences of European creative clusters show that they perform networking and knowledge exchange in the cluster functions well. Among other important activities implemented by creative clusters (in particular the public clusters' coordinators), we should find support for the creation of new businesses and assistance in financing in the start-up phase. In practice, financial support for startups in clusters consists in providing access to private and public investors' capital. However, a specific sectoral approach for creative industries has not been developed, except for the creative ICT sub-sector and multimedia. Cluster coordinators holding current knowledge on the sector’s development and local or regional competency gaps could suggest activity for the created startups. Practice, however, proves that startup financing activities could be significantly intensified. Similarly, exploiting the potential of large companies in creative industries as potential investors could be much wider. It should be noted that this information is based on general data acquired from clusters coordinators, which would require to be more detailed in the case of a precise analysis. Limiting startup financing may also be in line with the expectations of existing members, who may perceive new entities as potential competitors.

5. Summary and conclusions

The presented analyses prove the development of the creative industry in Europe. Creative clusters appear to be developing in a moderate and adjusted to the development of creative industries manner. This moderation results from incompleteness, especially inaccuracies of data. On the one hand, precise support for the creative industries is expected due to their significance in the development of regions and countries, while on the other hand, difficulties in defining them precisely are encountered: scientific, political and social dialogue in this area is clearly discernible in all European countries, starting with Great Britain, which has the biggest experience in conducting a conscious policy towards creative industries. Difficulties in analyzing the creative industries are primarily related to identifying creative activities. Even in the case of precise identification of activities based on NACE 2.0, there is an error resulting from the fact that the entities in the sector vary in the type of realized activity, combining activities regarded as creative with other activities. It is important to realize, however, that without precisely defined creative industries and creative clusters, there is no question of targeted and rational support for this type of activity.

The biggest role in economy and potential of development in creative industries is attributed to sectors related to ICT. The ongoing process of digitalization in industry, society and culture is a phenomenon which stimulates market value of the ICT sector. Therefore, we might expect for the creative industries to extend their activity on action, which were not hitherto treated as 'creative'. The ICT sector, similarly to creative industries, has horizontal impact: it supports the development of the remaining industrial sectors as well as the public sector.

Public support for the creative industries can involve many aspects: from direct cultural funding, through support and creation of creativity and culture spots, publicly funded projects that directly or indirectly support creative industries. Among forms of support, however, we can observe integration of public and private funding with the increasing involvement of the private sector in the creation of new businesses (start-ups). This type of support model already exists in the western EU countries: bearing start-up business risk by a private investor, with content and infrastructure support from public funds. Such a support model also requires the use of detailed knowledge of the sector and the establishment of precise identification criteria. Concentration of private support for the creation of new entities should be accompanied by public support for infrastructure, cooperation (within networks and clusters), and knowledge management, which may also be implemented by networks and clusters.

In the current state of implementing the development EU strategy – Europe 2020, regional and smart specializations gain crucial relevance. Defining them might be of assistance in direct support for creative industries in the region. Even in the regions, which were not in favor of CCI as smart specializations, a horizontal role of these sectors for supporting selected smart specializations might be indicated. Moreover, important issues to bear in mind are long-term impact of creative industries supporting preservation and promotion of regional and national heritage, as well as impact they have on the education of new generations of citizens.

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