

Diagnosis of the creative industries in the Gdansk Metropolitan Area.

Final report.

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Introduction

EU strategic documents indicate that companies from the cultural and creative industries have the potential to contribute to the success of the Europe 2020 strategy, including its key initiatives, such as the Union of Innovation, Digital Agenda, a program for new skills and employment and industrial policy in the globalization era.¹

Creative sectors attract high quality human capital, affecting the formation of an attractive living space for residents and businesses. Although the creative innovation is primarily the result of individual and collective creativity, important in this regard is the support of public institutions at various levels and the cooperation of the enterprises from the traditional sectors of the economy, present in a given location.²

This study is based in the frames of an international project " Development and Promotion of Creative Industry Potentials in Central European Cities " (Creative Cities) carried out by the Gdansk Foundation for Entrepreneurship in cooperation with the Office of the City of Gdansk.

The main objective of this project is to exploit the potential of creative industries to increase the competitiveness and attractiveness of cities participating in the project.

This objective is to be achieved through:

- improving framework conditions and to initialize creative industry clusters
- promoting entrepreneurial skills and competitiveness of creative industries, creating positive climate attracting different investments and exchanging know how
- improving their external visibility through transnational marketing and networking
- exploiting potentials in the development of decayed urban areas through the allocation of creative industries in those city districts.

¹ Zielona Księga w sprawie uwalniania potencjału przedsiębiorstw z branży kultury i branży twórczej, Komisja Europejska, Bruksela 2010

² Mackiewicz M. Analiza potrzeb i rozwoju przemysłów kreatywnych, Ecorys na zlecenie Ministerstwa Gospodarki, Warszawa 2009

Summary

Creative industries sector is a new phenomenon in the European economy and knowledge about it's development and drivers is still small³. Therefore, development activities in this sector should be based primarily on regional specificities.

A strong growth potential

Creative industries contribute significantly to the economic potential of the Gdansk Metropolitan Area and the whole region. In 2006 over 63 thousand people were employed in 28 thousand companies operating in the region in sectors defined as the creative industries. They accounted for a total of 13 percent share of entities and 8 percent share of total employment in enterprises in the province. Within 5 years the sector recorded more than 17 percent increase in the number of firms, despite the crisis at the beginning of the decade. The greatest growth rate showed the following sectors: software (an increase of almost 50 percent within 5 years), advertising and production of jewelry.

From the viewpoint of the structure of entities the most often represented sector of the creative industries were: retail sales of cultural goods, design, architecture and software. However, there is a strong under representation of some of the creative sectors in the region such as: journalism and publishing, museums and other cultural activities as well as film industry.

Strengths of the creative industry in the metropolitan area include the great creative potential, high quality of products and services, skilled workers and the use of new technologies in creating innovative products. These strengths are based on broad cultural tradition of the region, educational and research potential and quality of life that attracts creative talents from the whole Poland.

Weaknesses of the sector in the metropolitan area are related to the implementation of the creative potential in the context of business activity. This is mainly due to the structure of companies – domination of the micro-enterprises – as well as weak access to capital and organizational problems related to the implementation of large, complex projects. Companies in this sector do not lack exceptional, innovative products and services, but rather the strength in the development of specific know-how, eg in the context of modern business models suited to implemented products and services.

Promotion and International Cooperation

³ New Cluster Concepts Activities in Creative Industries, Produced for the European Commission Enterprise & Industry Directorate-General, January 2010

The volume of required resources and the uncertainty of outcomes often discourage local creative companies to take action in new markets, especially international. This situation may be addressed by increasing the international visibility of the companies and the entire creative industry from the region by creating a strong brand, effective promotion activities and assistance in integrating into international networks, projects and value chains.

The increase of knowledge transfer on a global scale and internationalization of regional creative potential can be achieved by the participation of the Pomeranian institutions and enterprises in international projects aiming at the creative sector. This kind of cooperation enables the evaluation of own achievements in relation to the level seen in the world (benchmarking). There are broad opportunities for participating in international networks and receiving financial support for such activities posed by European programmes such as 7th Framework Programme and the macro-regional programmes (the Baltic Sea Region and the Central Europe Programmes).

Support for companies

Opportunities for the development of the creative industries are associated with both the regional circumstances, such as events in the form Euro 2010 championships and the efforts to become European Capital of Culture 2016, and with active measures that can be taken by companies and public sector institutions. Representatives of the creative sector are not aware of available support instruments offered in the region, they also do not exploit fully the potentials of science, research and education, which could become the driving forces of economic development in this sector.

Small businesses do not have sufficient capacity to undertake individual large, complex projects on their own and often are forced to the role of subcontractors. Supporting the development of sectoral cooperation platforms and increasing interaction and communication between business will help to raise the necessary experience and form a network of cooperating companies, that will have the skills to effectively manage large projects. The chance to realize the full potential of the sector is also connected with the direct support for the development of organizational, project management and marketing skills in companies. This can be performed in the form of the dedicated training offer, support for the professionalization of services or the development of tools for project management with special reference to the creative industries.

Another step in overcoming barriers of development of creative businesses are activities towards formation of specialized financial services market. Currently, financial institutions do not support companies operating in high-risk sectors or seeking a relatively small financial outlay. Funding mechanisms should be "tailored" and meet the specific needs of companies i.e. in form of facilitating the contact with managers of venture capital funds. Opportunities for financing projects include support for the development of "investment readiness" in companies by developing the skills of providing investors (but also banks) with a feasible development strategy and a business model to achieve a high return on investment.

Feasible regional policy towards creative sector

According to industry experts opportunities for the creative sector at the strategic level is "to give a direction" for actions in scope of investment and development planning. The main element of these activities could be: creating a coherent regional policy for the creative sector, highlighting its importance in other strategic documents as well as including aspects relating to creative potential in other sectoral policies such as spatial planning. One possible direction is to provide a space for activities of creative industries through the revitalization of less developed neighborhoods and areas of the Metropolis.

Creative industries regional policy should include creating a platform for dialogue between private and public sector, in particular, creative businesses and cultural institutions. Creative companies participating in this study are very open to collaboration with public institutions and research and development units as well as willing to engage in activities related to the development of the future strategic direction of the sector in the region.

Cooperation between the various partners in the creative industries sector will enable the implementation of projects that would not be possible without creating a formal cooperation group. Acting together, companies can more effectively impact the environment such as the educational institutions, local or regional authorities - the strategies and directions of public spending, infrastructure investment, etc carried out by them. Identification of common interest and creating a pressure group significantly increases the chances to achieve the desired change.

The critical challenge will be the effective use and integration of all these factors to actions to strengthen the creative industries sector in the Gdańsk Metropolitan Area. It is especially difficult in the context of small knowledge of public sector representatives on the potential and the development factors of creative industries in the metropolis. The above-mentioned proposals for action can be supported by the public sector, not only for co-development activities but also through the creation of a coherent public policy to promote the creative sector, promoting the region as a location for innovative businesses and establishing a dialogue with representatives of organized sector.

Supporting the development of cluster initiative

One element of supporting to development of the creative sector by local authorities is to stimulate the formation of clusters. Creative industries have a number of features that set it apart from other industries and therefore supporting the development of clusters of creative industries should meet different assumptions than the more traditional sectors. In the case of this industry much more attention should be paid to meeting the appropriate critical mass and securing the diversity of actors, institutions and individuals since it is the diversity factor that is highly stimulating for creative sector.

Activities within the cluster already in the short term could bring benefits in terms of information about the environment in the creative sector, identified opportunities for development and a new place to meet current and future business partners. There is also an opportunity to promote the businesses, not only at the cluster forum, but also on the wider

market, and thanks to the international cooperation also support in finding suitable partners abroad. Participants of the cluster initiative are often able to use the services of cooperating experts from business and academic communities. Available support may include also advice on law, marketing, new technology and in other fields.

Cluster initiatives in the sector should take steps towards ensuring social environment for the creative talents as well as the traditional cluster activities directly stimulating the development of creative businesses. There is a risk that the support will be focused only on business initiatives so that the social perspective, essential to creating effective networks will be neglected. The same applies to the proposal of creating a platform for cooperation and exchange of knowledge, which must be in many respects attractive to key actors of the creative industry to be fully exploited.

Methodology and terminology issues

Scope of the study

This study is based in the frames of an international project " Development and Promotion of Creative Industry Potentials in Central European Cities " (Creative Cities) carried out by the Gdansk Foundation for Entrepreneurship in cooperation with the Office of the City of Gdansk. The project consortium consists of 10 partners from five different European cities: Leipzig (DE), Genoa (IT), Gdansk (PL), Ljubljana (SI) and Pecs (HU). They represent different types of metropolitan areas: located in the "old" and "new" EU member states, being capital cities or without these features, having different paths of development and long or short tradition of the creative sector.

The project involves conducting studies such as quantitative and qualitative studies as well as the SWOT analysis of industries, infrastructure and environment in order to obtain the best possible view of their current state. Study is conducted in all the aforementioned five metropolitan regions of Europe with an uniform methodology, so that inter comparisons can be made. The project also involves a detailed analysis of the processes taking place within individual regional economies. For this reason, project results could be useful for developing or updating the creative sector strategies in the analyzed urban regions.

Methodological frames of the project relate to the metropolitan area - Gdansk Metropolitan Area is not an official administrative unit (as in some other countries) and for the purposes of this project has been defined as an area covering nine counties: the City of Gdansk, the City of Gdynia, the City of Sopot, the city of Wejherowo , Gdansk area county, Kartuzys area county, Puck area county, Tczew area county, Nowy Dwor area county.

Sources of data

The frames of the project envisage fairly open research methodology in the project due to the variety of economic theories in the field of creative industries, different local circumstances and approaches. The project focuses on assessment of the situation in the creative industries in the partner cities, based partly on statistical data but mainly on qualitative study for the SWOT analysis.

Quantitative study was based on a set of source materials including measures of quantity (number of firms, number of employees), derived from statistical offices and statistical studies and literature. There were also preliminary interviews conducted with representatives of the industries for the purpose of verification data and preparing materials for an in-depth analysis.

Study on the number of companies and employment in the creative sector encountered serious methodological obstacles. Typical statistics for employment (form Fo1), refer only to entities with more than 9 persons. In the Gdansk Metropolitan Area micro units (employing less than 9 persons) constitute an estimated 96 percent of all businesses in the creative sector. Therefore, it became necessary to rely on the REGON system data (National Official Business Register), despite their considerable statistical burden (different approach). The data were presented at three digit level of EKD (NACE) in the regional layout. This influenced the study results, as in some industries such as sales of cultural goods (aggregated as EKD/NACE 52.4 Retail sale of industrial goods in specialized stores), data were presented on such a high level of aggregation that they lost the specificity and may lead to an overestimation of the actual state of the creative sector. Such action was however necessary to be able to perform further inter-comparisons.

The main problem was however the lack of access to detailed data, due to restrictions imposed by law on statistical confidentiality. In case of the absence of source data estimations were carried out based on secondary materials or information obtained from representatives of the studied sector. Especially in the case of the creative industries, where there are many quasi-public entities estimations are necessary to analyze the full picture. Due to the difficulty in accessing the data for growth rate comparisons two years: 2000 and 2006 were taken into account. All statistics, unless otherwise stated, are from the Statistical Office in Gdansk.

Due to restrictions in access to statistical data the quantitative analysis could not be fully undertaken at the metropolis level (no such administration unit in Poland). However data on the concentration of industry activities in the metropolis (quoted in the main report) indicate that the regional data are also largely representative for the metropolitan area.

Due to the existence of close links within the operating sectors and potential clusters, analysis of the environment has been also carried out ie, there were various institutions and organizations identified that affect the environment for the development of creative industries in the metropolis.

In the quantitative analysis there was also a location quotient used. It is calculated on the basis of data on the number of employees or any other variable in question (sold production, exports). LQ quotient takes the following form:

$$LQ_{b,r} = \frac{e_{b,r} / e_r}{e_{b,PL} / E_{PL}}$$

It compares the share of the industry e_{br} in the total number of workers in the region e_r to the share of the industry (whole country) e_{bpl} in the total number of employed persons in Poland E_{pl} . It indicates how much more is the degree of concentration of the industry in the region higher / lower than the national average. In many clustering mappings carried out in Europe the presence of a significant concentration level of LQ 1.25 was adopted as benchmark. In other words, the concentration of at least 25 percent higher than the national average.

Due to the nature of the research problem quantitative study was complemented by qualitative study and in-depth interviews with representatives of companies, organizations, scientific institutions, cultural institutions, administrations and companies.

In the first stage of the study an overview of the literature on creative industries was made based on desk research method. The review included an analysis of strategic documents of Polish and European documents and publications, industry reports towards defining the determinants of creative industries' development. After the desk research first hypotheses were stated and then reviewed during the in-depth interviews with representatives of the creative sector entities. Group of respondents to this part of the study consisted of the managers of the key stakeholders in particular sectors. There were over 20 in-depth interviews carried out.

An additional element of the qualitative study was preparing the description of good practices of activities aimed at developing creative industries. Case studies could serve as inspiration to those interested in the development of creative industries cluster in the Gdansk Metropolitan Area. The report was also supplemented by information about the cluster concept, in particular the creative cluster characteristics.

Upon completion of this stage of research there was a workshops meeting held with representatives of parties from the creative industries, representing different subsectors. The meeting aimed at verifying the results of qualitative studies and preparation to the SWOT analysis.

The purpose of the SWOT analysis was to determine the most important internal and external factors for the future development of the creative industries sector in the Gdansk Metropolitan Area.

The SWOT analysis was based on selecting the most important features in the various strategic areas such as:

- potential of the metropolis and the region,
- competitiveness and innovation,
- human resources,
- awareness of the benefits and willingness to cooperate.

Selected factors were then analyzed and ranked. This analysis was based on an assessment of importance of individual factors and the determination of whether in the creative sector outweigh strengths or weaknesses and whether in the environment are more opportunities or threats. This allowed to choose the right strategy (aggressive, competitive, conservative or defensive).

Defining the creative industries for the purpose of the project

Conducting a study on the status and dynamics of the creative sector in metropolitan areas and in particular the comparative studies indicates problems mainly due to difficulties in defining the sector. Its development goes in line with the decline of the traditional model of production of standardized goods and traditional classification of economic activities

associated with it. Also the nature of business changes that can be described as creative: a growing role of small, flexible companies operating within the complex networks of value chains.

Brand products are becoming as important as its utility features. These challenges make it difficult to subject the creative sectors to conventional classification criteria, which in turn leads to ambiguity and mixing the concepts used in the literature and classification. In this study difficulties occurred also with the Polish translation of the terminology used in the project.

Studies on creative industries are conducted for several years now. However there has not been developed yet an universal definition, as there has not yet been adopted the common Polish translation of the term.

One of the most common definition of the creative sectors developed by the DCMS (the UK Government Department of Culture, Media and Sport) is:

The activity, which derives from individual creativity, skill and talent and which has the potential to create wealth and jobs through the generation and use of intellectual property.⁴

This definition is based on the assumption that creativity is a major factor in the production process of creative industries, while intellectual property is a characteristic feature of its outcome. This means that some industries belonging to the creative industries can be associated with groups of statistical classification, such as the European NACE (Statistical Classification of Economic Activities in the European Union).

The framework of the study involves focusing on a few "common" industries that exist in all metropolis and that each project partner should take into account during statistical analysis in order to build a common database to compare the status of the creative industries. Due to the diversity of industries, specialization and creative activities in each city / region, in addition there are some "flexible" (optional) industries taken into account. These industries can be linked to specific city's area of expertise. Non-mandatory status implies that each partner individually selects the flexible industries according to individual profile.

The framework of the project requires that the creative industries subjected to the study cover the following sectors:

- Artists' and Performing Arts
- Film Industry
- Journalists and publishing
- Library, archives, museums
- Other retail sale of cultural goods
- Architecture

⁴ DCMS *Investing in creative industries – a guide for local authorities*, UK Government, Department of Culture, Media and Sport (DCMS), London 2009

- Design
- Advertising
- Software Industry

In addition an industry with specific relevance to the region and the Gdansk Metropolitan Area was selected :

- Manufacturing jewelry

As a further non-compulsory industry specific for region tourism was considered, but in spite of its significant contribution to the region's economy, after a preliminary analysis and estimation of the potential of this industry to create high quality jobs and use of intellectual property the selection was abandoned. However, the description of elements of the tourism potential associated with the region's cultural heritage and a common platform for cooperation between different industries is included in the study. Creative sector classification adopted in this study in conjunction with the Polish Classification of Business Activities is presented in the annex.

It should be emphasized that this classification, certainly debatable, is the result of a compromise between the assumptions of different approaches towards the study of the creative industries sector and the means of obtaining comparable statistics in different countries.

The Creative sector and its role in the development of cities and regions

Introduction to the theory of creative industries

European Union institutions increasingly recognize the importance of creative industries for the competitiveness of Europe. The year 2009 was proclaimed the Year of Creativity and Innovation to emphasize the links between culture, creativity and innovation.

The term creative industries refers to a wide range of economic activities that deal with the production or use of knowledge and information.

Creative industries are becoming increasingly important in shaping economic prosperity. The supporters of economic theories based on this concept stress that "human creativity is the basic economic resource" and that industry in the twenty-first century will depend greatly on the production of knowledge through creativity and innovation.⁵

Characteristics of creative industries

According to Caves the creative industries are characterized by the specific economic characteristics:

- The principle of "nobody knows". There is a strong uncertainty about demand, because the response of consumers to a product before placing on the market is not known, nor easy to grasp / understand after the occurrence.
- Art for art's sake: Employees pay attention to the originality, technical issues, harmony, etc. of goods and services and, therefore, are willing to work for a lower salary in interesting and unusual projects,
- The principle of the Motley crew: relatively complex projects (such as in the film industry production) require different skills and competencies. At least a minimum level of each of these competencies must be present during the process for the final result to be worthwhile.
- Infinite variety: Products differ in quality and uniqueness; each product is a unique combination of component parts or skills that lead to the creation of an infinite number of possible outcomes (eg, works of creative writing, poetry, screenplays, et al.)
- A List / B List : Skills are vertically differentiated, artists are ranked according to their skills, talent, commitment to product development. Small differences in skills and

⁵ Florida, R., The Rise of the Creative Class. And How It's Transforming Work, Leisure and Everyday Life, Basic Books, 2002

talent may affect the possibility of large differences in the reference and (financial) success;

- Time is running out – in the coordination of complex projects in cooperation with different skills time is of the most importance,
- Ars longa: Some creative products have durability aspects related to the protection of copyright, which allows developers or contractors to draw from their long-term benefits.

The above listing of properties has often been criticized as being too rigid. Not every employee in the creative sector is motivated just by art for art's sake. The principle of "ars longa" refers also to those parts of products not originating in the creative process. The feature "time is running out" applies equally to large construction projects. Creative sectors are not really unique in their characteristics, but they have a much greater intensity of them in relation to non-creative sectors.

Creative class

Some authors, such as the American economist Richard Florida are in favour of a broader view of the performance of the knowledge workers and have introduced the term "creative class." In the creative class Florida includes people whose work involves creative problem solving and creating innovation such as: researchers, university lecturers, artists, media people, as well as professionals in the fields of modern technology, financial services, legal, management and medicine. Their primary duties consist of independent thinking, the use of nonstandard approaches to different tasks, independent assessment of situations and implementing new ideas.

This approach suggests drawing special attention to cities that attract representatives of the creative class, which become centers of innovation. In a study seeking to determine why some U.S. cities (like San Francisco) attract creative producers, Florida argues that the high rate of creative class workers is a key factor for the development of creative businesses, and is sought by these companies in different locations. In his research, economist is looking for quantitative, measurable evidence of the importance of diversity and multiculturalism in these cities, for example, in the form of the gay community, ethnic diversity and the tolerance level for creativity and thus the success of regional economies.⁶

The economic importance of creative industries

In response to the economic crisis last year the need to implement new solutions in the fields of economy was noted and attention was focussed on the economic potential of creative industries in the European Union. The European Commission is developing a Green Paper on

⁶ Florida, R., *The Rise of the Creative Class. And How It's Transforming Work, Leisure and Everyday Life*, Basic Books, 2002

Cultural and Creative Industries, which will be a document with recommendations on policy towards the development of the creative sector.

The importance of creative industries is inextricably linked to economic development in developed countries. A new kind of economy is characterized by new forms of consumption, whose main features are:

- Speed: the product life cycle is shorter (especially in the ICT sector). Consequently, the
 - The cooperation in the scope of research and development is essential in order to share the costs of product development in a rapidly changing market situation,
 - being first to market a product is essential, particularly in the digital economy,
 - product differentiation and the extent of the product offer is important.
- Fitting: These products are customized for different market segments; a separate strategy is required for different products and services in different markets
- Intangible assets (meaning, experiences, aesthetics, user interface) is as important as the functionality of the product. The cultural value of the product is in some cases as important as the economic value.

A new kind of economy is characterized also by the organization of new forms of economic activity where:

- the rights of access to property and possession of property are equally important and people attach importance to the sharing of content rather than to sale,
- expression of talent is encouraged in the organization, by appreciating the freedom and autonomy of employees as well as their different way of thinking.

The transition from an economy based on manufacturing to one in which intangible assets are a key source of value is characterized by increasing consumer sovereignty. Very often consumers are not looking for a product but for a brand that is associated with specific values. Under this new paradigm marketing is as important as production. The new economy requires creative skills because the gains from improvements in productivity are no longer sufficient for competitive advantage. Creativity based on culture is a strong factor in shaping the norms and conventions. Creative people and artists are critical in this process. They develop ideas, metaphors and messages promote better communication with the community.⁷

One element of supporting the development of the creative sector by local authorities, including attracting creative human resources, is supporting the development of clusters.

⁷ The Impact Of Culture On Creativity A Study Prepared For The European Commission (Directorate-General For Education And Culture) KEA European Affairs, June 2009

Determinants of the development of creative industries

Globalization and new business models

Globalization presents many challenges for the future development of creative industries. Globalization affects the gradual opening of global markets, changes in the patterns of how people spend time, competition structures and work practices performed by employees (and not just creative). These changes necessitate not only changing business models, but also the system of intellectual property rights, which in its present form does not correspond fully to participatory and niche culture.⁸

Among factors influencing the development of creative industries in an international context are the policies of individual governments; not just those policies directly related to these industries but also new regulations concerning health, safety, social issues.

Changes in technology as drivers of the creative industries development

Technology plays an important role as a factor that stimulates the development of new products, services, distribution channels, business models and sometimes even the emergence of new major economic sectors. Interoperability plays an important role in ensuring equal access to new platforms and infrastructure. Standards help to ensure the interoperability between new and existing products, services, processes, systems, software and networks. It is important not only for producers (especially small and medium-sized), but also for users. Promoting the interoperability of platforms and devices was considered essential to the development of creative industries in the European Union.⁹

Convergence and user-based innovation

Convergence in the creative industries applies to all spheres of economic, technological and cultural factors. In the first case it refers to the horizontal integration of media companies and the creation of large conglomerates, managing the flow of content in different media. In the technological sphere it refers to equipment that combines different features, but according to cultural theorists, this trend is not as clear as one might think. This phenomenon is not just economical and technological, but also cultural. It's about recipients actively connecting content from various media channels. Thanks to new technologies and business models, consumers can also become producers.¹⁰

Users have always been involved in the innovation process, but usually it has occurred at the end of the innovation process, when customers tested the prototypes and expressed views on

⁸ Bendyk i in., *Kultura 2.0, Wyzwania cyfrowej przyszłości*, Polskie Wydawnictwo Audiowizualne Warszawa, 2007 r.

⁹ KOM(2010) 183 Zielona Księga w sprawie uwalniania potencjału przedsiębiorstw z branży kultury i branży twórczej, Bruksela, kwiecień 2010

¹⁰ Bendyk i in., *Kultura 2.0, Wyzwania cyfrowej przyszłości*, Polskie Wydawnictwo Audiowizualne Warszawa, 2007 r.

the form and function of a new product. The new model requires the involvement of users in the first phase of innovation, the use of their knowledge to identify the challenges and problems that need solutions, and thus create a business opportunity.

The transfer of knowledge between sectors

In a world in which the various sectors of economy increasingly cooperate there are potential benefits from the exchange of knowledge and specialist know-how with other sub-sectors and other industries for example, in the usage of:

- the principles of modern industrial design in technological R & D projects,
- 3D visualization techniques to interpret and manage complex systems
- technologies related to computer games used for education and training.

Increasing importance of environmental issues

Observed climate changes, whatever their origins, have an indirect effect on such areas of creative industries such as consumer preferences and changes in the structure of supply chains. Creative industries, in addition to reducing the impact of their activities on the environment play an important role in supporting the activities in this field in other sectors, eg through sustainable design.

Good practices in the development of creative industries

Cap Digital - Parisian cluster of digital content, services and expertise¹¹

The French cluster of digital content, services and expertise is located in the Greater Paris region. It is a non-profit organization founded in 2005 by the French government. More than 600 members are involved in the initiative, mainly innovative small and medium-sized companies but also universities, research institutions, laboratories and large business entities. In the Paris region, broadly defined digital content industry is responsible for over 150,000 jobs and 15,000 academics and graduate students. The potential of the region is estimated to be 70-80 percent of the overall French market in this area - about 12 billion euros.

The initiative aims to support the development of French industry through co-operation of companies and laboratories and the main tool is to help in raising funds for the development of new products and services in public competitions. Over the past four years nearly 300 research and development projects have received public support (from about 1000 applications); the realized projects amounted in total of 550 million euro (including 250 million euro in public financing.) The structure of actions and collaboration of participants is based on the task groups, within which there are project teams and consortia established. In those groups identification of the needs for technological development and the necessary organizational and promotional tools are developed.

The initiative is supporting the creation of joint development projects between companies and laboratories. The projects are then subjected to rigorous peer review process and ranked by a group of cooperating experts (database with more than 100 experts from different fields). Only this way projects can receive accreditation, which is a guarantee of high quality of the project and a pass to seek co-financing from public funds. The initiative also offers assistance in terms of access to information, including international benchmarking, market analysis, newsletters, current information and analytical reports of the cooperating research institutions. Companies within the cluster are encouraged to take up international activity i.e. through joint visits to trade fairs and business missions, access to specialized information on specific export markets and intensive cooperation with foreign clusters.

Cap Digital has the competence of supporting companies in the field of human resources including specialist recruitment portal, access to training for employees, support in the organization of joint projects. The initiative is promoting sharing of infrastructure resources, in particular between large and small companies and research laboratories.

¹¹ Chapter based on information from the Cap Digital Cluster and www.capdigital.com

Clusters as a means of creative industries development

One of possible ways of supporting the creative sector by local authorities is to stimulate the formation of clusters.

Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries and associated institutions in particular fields, competing with each other but also cooperating. (M. Porter, 1990)

Benefits from the activity in the frame of cluster are consequences of the spatial proximity of a large group of independent entities, the accumulation of specific knowledge, skills and expertise, ease of finding employees and business partners (contractors and service providers) and the implementation of joint activities in certain areas.

One of the major advantage of participating in a cluster is the facilitation of cooperation between the participants. Each entity has the ability to easily establish a permanent partnership with other entities or create one for the purpose of implementation of a projects. Cluster organization helps significantly in the process of company's networking.

Activities within the cluster already in the short term bring benefits in terms of information about the environment in the creative sector, identified opportunities for development and a new place to meet current and future business partners. There is an opportunity to promote the business, not only at the cluster forum but also on the wider market, and thanks to the initiatives undertaken on international level, finding suitable partners abroad.

Participants of the cluster initiative are often able to use the services of cooperating experts, coming from the business and academic communities. Available support can also be advice on law, marketing, new technology and other fields.

The activities of creative industries is based on a rich and diverse cultural heritage and the work of talented artists, and is dependent on entrepreneurship and innovation that are necessary to put the fruits of creativity to the market. Production processes in creative industries are also subject to constant adaptation and innovation, which requires a continuous exchange of information, the use of intangible assets and attracting talent - these features make clusters a very good cooperation structures for the creative industries. Clusters can provide a framework of intensive cooperation between the various related entities and innovative institutions.¹²

¹² COM (2010) 183 Zielona Księga w sprawie uwalniania potencjału przedsiębiorstw z branży kultury i branży twórczej, Bruksela, kwiecień 2010

The context for creative industries of the Gdańsk Metropolitan Area

The national context ¹³

Poland is situated in the northern part of Central and Eastern Europe, by the Baltic Sea. The country is one of the largest in Europe in terms of territory but also in terms of population. Poland has a permanent population of over 38 million people, which puts it on eighth place among the European countries (excluding Russia). While before World War II, Poland was a multiethnic state, now is inhabited mainly by one nation. Only 4 percent of population declares belonging to other nationalities, mostly German, Belarusian, Ukrainian and Roma. With its central location in Europe, Poland has good access by road, rail and air with all the countries of the European Union and is well prepared to pursue trade and cultural exchanges with countries in its neighborhood on the east.

Poland has a strong economy and a solid foundation for its further development. In the years 2003 - 2008 GDP growth in Poland has averaged 6 percent a year. There are more and more private enterprises, including those founded by young people. Those Polish companies with well-established and well-known brand are successfully exporting their products, cooperating with foreign partners and investing abroad.

Despite few percent decline during the crisis, Poland still records a high level of domestic demand and retail sales to domestic customers. It is the domestic demand that contributes significantly to the growth of Polish GDP. According to the Eurostat data, the Polish GDP growth in 2009 was 1.9 percent. It is the best result among all EU countries. The unemployment rate in 2009 did not exceed 11 percent and, despite the downturn, it has not increased dramatically. Poland still has large reserves of skilled workers.

Well-educated Polish economists, engineers, computer scientists and researchers are respected and sought as employees of IT companies and research and development centers. Every year number of graduates from Polish universities increases, mainly the specializations sought by companies investing in technologically advanced industries. In the country there are nearly 500 colleges and universities, where more than 100,000 scientists works, with half of them holding doctorates. In 2007, 410,000 people graduated from Polish universities and nearly 2 million people began studying. There is also a growing number of people taking up doctoral studies.

The world's largest corporations locate their R & D development centers in Poland. Polish IT specialists are very eagerly employed by international companies in Poland but also abroad and represent a large proportion of managers responsible for research and development departments in the world's largest corporations.

¹³ Podrozdział przygotowany na podstawie materiałów Polskiej Agencji Informacji i Inwestycji Zagranicznych

A major drive for the further development of the economy, particularly for sectors like construction, services and tourism, are the ongoing preparations the European Football Championships EURO 2012, which will be hosted by Poland and Ukraine. A major challenge for the Polish economy in the coming period will also be the meeting of criteria for adopting the Euro currency. According to the Minister of Finance, it will happen by 2013.

Creative sector in Poland

In Poland, according to the data reported in the National Strategy for the Development of Culture, percentage of GDP generated in culture and cultural industries amounted 4.5 percent in year 2002. The share of gross value added in the same year amounted 5.2 percent. The data should be interpreted with caution due to different definitions and classifications of the cultural sector in relation to the creative sector and different base of economic statistics.

Unfortunately, lately no national studies have been carried out regarding creative sectors. There is no current data at national level nor in the context of employment, neither on the impact on the economy. Despite these difficulties, the fact of the growing importance of the creative sector in social and economic structure of the country seems to be irrefutable.

Creative industry in Poland comprise of both private for-profit companies and non-profit organizations and public institutions. The public sector is an indispensable element in the development and operation of the creative industries - public units dominate in some categories of activity such as:

- Activities of cultural units,
- Activities of libraries and archives,
- Activities of museums and monument protection.

There is a significant share of the institutions involved in cultural activities coming from the public sphere - almost all the libraries, 90 percent of museums, almost 67 percent of cinemas and 56 percent of art galleries. Public sector prevail among the organizers of the stage activities. Local governments account for almost 80 percent of public expenditure on culture, the state budget involvement accounts for 20 percent.

The political system

Poland has a well-established system of democratic government - a multiparty republic with a two-chamber parliament. The Head of State is the President, elected by a majority of the voters for five years. Upper chamber of parliament - the Senate - has 100 senators, while in the lower chamber - there 460 members. Domestic and foreign policy is conducted by the government - the Council of Ministers, whose activities are directed by the Prime Minister. Head of Government and the ministers are appointed by the President. The body of governmental administration and representative of government in the region is the Region Governor. There is a three level division of territorial state, which units are: municipalities, counties and regions.

The country is divided into 16 regions. Each region is administratively independent and guides the development of the region. All self government units are chosen in general elections, each of which is independent from each other hierarchically. Regional and local government performs multi-tasks, relating to the upgrading the economic, cultural and health state of the area.

Regional government creates and implements a development policy for the region. This activity includes promoting economic development through the Regional Innovation Strategies. Self government units are responsible of a cultural patronage, which is to support and promote art, cultural education, activities and initiatives and protection of monuments. This is done mainly by funding (development and maintenance) of local cultural institutions and cultural projects from budgets of individual local government units.

National policy in the cultural sector

In each of the Polish region there are many monuments of Polish rich history and culture. Tourists are willing to visit monuments and old parts of Polish cities, with preserved buildings and layout of streets, mainly in Warsaw, Krakow, Gdansk, Torun, Wroclaw and Poznan. Polish museums and galleries are known for their rich collections of paintings and contemporary art. Poland is famous in the world by the excellent reputation of Polish artists and music events, theater and films they create. Some of Polish top events are: The Chopin Festival and Competition, The International Festival of Contemporary Music Warsaw Autumn, The Jazz Jamboree Festival - one of the oldest and largest jazz events in Europe, The Warsaw International Film Festival and other film, theater and music screenings with an European dimension.

Minister competent in matters concerning the material and intangible national heritage and cultural activities, including the state patronage, is the Minister of Culture and National Heritage. The Minister of Culture is responsible for the condition and development of culture in Poland. Minister's responsibility includes the implementing of government policy on culture and national heritage, dealing with cooperation and coordination with other departments of government, state institutions (including local government) and NGOs in the field of culture. Responsibilities include also international cooperation in the area of culture. One of the main tasks of the Minister of Culture is planning and implementation of the national budget for culture.

The Minister is responsible also for the implementation of strategic programs such as:

- National Strategy for the Development of Culture for 2004-2013
- National Cultural Programme for Debut Support and the Development of School of Arts "Maestria" for 2004-2013
- National Cultural Programme "Cultural Heritage Conservation" for 2004-2013
- National Cultural Programme "Promotion of Reading and Development of Book Sector" 2004-2013
- National Cultural Program "Development of Artistic Institutions," for 2004-2013

- National Cultural Programme "Signs of the Times" for 2004-2013
- Supplement for the National Strategy for the Development of Culture 2004-2020.

National Strategy for the Development of Culture for 2004-2013 (with supplement until 2020) is a document creating a framework for a modern state patronage in the cultural sphere. The strategy covers all areas and issues that are faced thinking about the functioning of culture, however, it treats it systemically, and not "sector oriented". The characteristic feature of the strategy is a horizontal view on wide range of issues, which then are a fundament for the National Programmes for Culture, which are the basic documents implementing the strategy. The strategy is aimed at managers of cultural sphere. In this context, culture is treated as a public investment¹⁴ - the impact of the projects supported by public funds implies a positive impact in the areas of:

- economy - culture / cultural assets as potential for development,
- society - associated with quality of life, aspiration to culture,
- spatial structure -collaboration, availability, replacement.

Currently the government works on developing The Social Capital Development Strategy¹⁵. The diagnosis made for the purpose of the strategy shows that the level of social capital is not sufficient to achieve the development challenges facing Poland in the next 20 years. An important aspect in building the social capital is the cultural and creative potential – it plays a significant role in the knowledge economy, but also it is a base for innovation, which is increasingly recognized as a key mechanism for change and development. In Poland, the culture is still not regarded as a valuable resource for development.

Factors creating social capital

- trust and civic activity
(transparent institutions, civil society, social participation)
- social communication
(public domain, public and social media, exchange of knowledge)
- culture and creativity
(Institutions of culture, creativity, heritage, creative industries)
- competencies and values
(a common identity, trust, openness, respect)

Source: Social Capital Development Strategy 2011-2020, Ministry of Culture and National Heritage, June 2010

The strategic objectives of this document relate to widen the space for high quality active communication and the development and effective use of cultural and creative potential. Directions for action include:

¹⁴ Kolas P. ,Wyzwania stojące przed sektorem kultury w Polsce, materiały seminarium "Euro na kulturę", 2010

¹⁵ Strategia Rozwoju Kapitału Społecznego 2011-2020, Ministerstwo Kultury i Dziedzictwa Narodowego, czerwiec 2010

- dissemination of standards and social behavior conducive to cooperation and shaping creative attitudes
- promoting cultural education
- ensuring common access to media services and preventing digital exclusion
- improving inter-sectoral and inter-institutional communication
- strengthening the cultural potential
- digitization, digital reconstruction and access to cultural heritage and scientific achievements.

One of the major directions is to develop a modern creative sector. The proposed actions will include support of networks of cooperation between the spheres of culture, science and business, supporting the implementation of innovation, system of tax and financial incentives for entrepreneurs in the creative sector, promoting artists and animators in creating a culture areas of economic activity, adjustment of the programs of art schools and universities to the needs of the creative sector and the issues associated with the intellectual property rights protection.

The Minister of Culture announces in each year a set of cultural programs. In 2009, they were: Artistic Events, Culture Infrastructure Development, Cultural Education and the Diagnosis of Culture, Cultural Heritage, Literature and Reading, Promotion of Polish Culture Abroad, The Minister of Culture and National Heritage Promise, Frederic Chopin Programme. Programs published annually by the Minister are the basis for competitions for resources for the task of the culture carried out by local government units, institutions of culture, film institutions, art schools and universities, NGOs and businesses.

The Ministry gives grants under the programme Mecenat for the realization of the meritorical tasks. Application is open only for the local government units for the tasks implemented within the cultural programs performed by the cultural institutions. In 2009, the Minister as a priority designated programs to develop the cultural institutions - the measures will mainly be directed to strengthen and develop the cultural infrastructure. Criteria for assessing the applications were: the financial situation of local government and cultural institutions and the importance of programs for the state's cultural policy. The amount of funds provided for projects in 2010 is 6 mln PLN (about 1,5 mln euro).

Minister of Culture and National Heritage in collaboration with a committee decides to grant the requests of the Fund for the Promotion of Artistic Activity, which is state-appropriated fund. The tasks that can receive funds from the Artistic Activity Promotion Fund are subsidies to publishing, scholarships and social allowances. The only source of income of the Fund are contributions paid by producers or publishers of literary, musical, artistic, photographic and cartographic data, those that are not subject to copyright protection. The fee for the fund is 5 percent of the gross income from the sale of copies of such works. This applies to releases published on Polish territory including both Polish and foreign authors. Subsidies to the publishing are provided to cover, in whole or in part, the costs of editions of artworks of particular importance for Polish culture and science, as well as publications for the blind people.

Scholarships are awarded to persons engaged in artistic activity, dissemination (including folk art), animation of culture and conservation of the monuments. Scholarships are awarded in the following areas: literature, visual arts, music, dance, film and theater, the protection of cultural and national heritage and the dissemination of culture (including folk art). Applications for social assistance are considered by the committee appointed by the Minister of Culture for this purpose.

The most important cultural institutions in Poland include:

- Adam Mickiewicz Institute is a government cultural institution which aims to promote Polish culture in the world and support cultural cooperation with other countries.
- Book Institute is a national cultural institution of the Ministry of Culture and National Heritage. Its mission is to promote books and reading in the country, and the popularization of Polish literature in the world.
- The Fryderyk Chopin Institute deals with, among others, research and popularization of knowledge about Frederic Chopin and his music, publications, organization of concerts, conferences and courses. Cooperates with Chopin institutions and organizations around the world, collects archival materials and museum objects, exercises control over the use of image and name of Frederic Chopin.
- The Polish Film Institute, the youngest film institute in Europe, aims to restore the Polish film's rank and position in the world. It's goal is to create a universally accepted mechanism to support film industry: development, production, promotion, distribution and dissemination, as well as the dissemination of film culture.
- Zbigniew Raszewski Theatre Institute deals with the promotion, documentation and animation of Polish theatrical life. Institute inspires public debate about contemporary Polish theater, broadens the perspective of the accompanying scientific discussion, supports research and education.
- National Audiovisual Institute in addition to publishing activities, recording the most valuable events of Polish culture and to actively contribute to cultural discourse carried out so far, from 2009 it is also responsible for a systematic digitization and dissemination of access to the restored and digitally recorded materials.
- National Cultural Centre is spreading culture throughout the country, maintaining and disseminating national and state tradition, the promotion of Polish cultural heritage, cultural education and creating interest in culture and the arts, conducting cultural information, as well as research and expert in the field of culture and national heritage in cooperation with local authorities.

European Capital of Culture 2016

In 2016, one of Polish cities, together with a Spanish city, will carry the title of European Capital of Culture. The aim of the selection is to strengthen the cultural cooperation and promotion of sustainable cultural dialogue at European level. The initiative is intended to provide an incentive for the establishment of a permanent European collaboration of the artistic spheres, foster cultural exchange and a broad participation in cultural projects.

In Poland, the desire for application was expressed by following cities: Białystok, Bydgoszcz, Gdańsk, Katowice, Lublin, Łódź, Poznań, Szczecin, Toruń, Warsaw and Wrocław. Choice of two to four Polish cities will be held in mid-October 2010, and the appointment of the nomination for the city by the Minister of Culture, will be done 2011. The selection of winners will be made by the EU Council in the second quarter of 2012.

The system of artistic education

Art education in Poland enables particularly talented children and young people an individualized education in the various fields of art. It creates a separate, in relation to general school, education system, for which the responsible is the Minister for Culture. The tasks of the Minister being the leading authority for the part of the schools and supervisor of all art schools are realised in the Department of Arts and Cultural Education in the Ministry and in the Artistic Education Centre.

The system consists of:

- arts schools realizing education only in the field of artistic subjects,
- art schools realizing in parallel art and general education (according to the same core curriculum and principles, as in mainstream schools)
- artistic institutions – art initiatives developing artistic interests and talents
- dormitories - the facility providing care to pupils attending schools outside their place of permanent residence
- art universities.

The whole art education system (primary and secondary level) in 2008 had a number of 634 schools, which educated nearly 81 thousand students. There were 355 public schools and institutions of art operating, of which 260 were led by the Minister responsible for culture and national heritage, and the rest by local government units. There are also 279 private schools and institutions of art from which 115 has the privileges of public schools. In 2008, in the schools run by the Ministry of Culture and Heritage there were 57 thousand students educated. In schools run by local government units there were 15 thousand students. In private education sector there are almost 8.2 thousand students educated.

In Poland, in 2008 there were 19 higher schools of art, including 9 Academies of Music, 7 Academies of Fine Arts and 3 Theater and film schools. In 2008, in all the higher art schools a total of nearly 15 thousand students were studying, including 9 thousand full-time program students. In 2008 than 2000 arts students graduates from the higher art schools.

The regional context

Pomeranian Region and the Gdansk Metropolitan Area

Pomeranian region covers an area of over 18,000 square kilometers, which represents about 6 percent of Polish territory. It is inhabited by 2.2 million people, majority of them living in urban areas. The region's capital - Gdansk, is known in Europe and around the world because of the Solidarity movement in 1980 under the leadership of Lech Walesa. Events of that period became a catalyst for democratic change in Poland and other countries of Central and Eastern Europe.

Gdansk Metropolitan Area covers an area of nearly 5, 000 square kilometers, which is inhabited by more than 1.24 million people. It is the fastest growing area in northern Poland and an important center in the Baltic Sea Region. It is also an important link in the transport chain at the intersection of important routes.

The economic profile of the region

Nearly 145, 000 of entities registered in the REGON system (National Official Business Register) operate in the metropolitan area . The overwhelming majority of them - more than 100, 000- are micro-enterprises (data for year 2007). Metropolitan area had been chosen as a location for over 15,000 capital companies, including joint-stock companies whose shares are traded on stock markets. Economic sectors with strong potential in the region include electronics industry, logistics, food, energy, construction et al.

Metropolis along with the entire region of Pomerania is among the top three most attractive locations for foreign investors in Poland. Gdansk Metropolitan Area, as well as the entire region, is one of the country's leading locations of enterprises in high-tech industries, mainly involved in production:

- electronics and telecommunication
- industrial automation
- pharmaceuticals and related products;

Also the service sectors are developing dynamically, mainly:

- information technology and software,
- operation of systems and databases,
- finance and accounting.¹⁶

The rapid development of high-tech sector is caused by high level of investment by multinationals as well as Polish companies transferring own know-how. It is also a result of high level of university education producing specialized, highly professional staff. Such companies include: Intel, IBM, Flextronics, Thomson Reuters, DGT ZenSar and Gemplus. Tools

¹⁶ Opracowane na podstawie: Atlas Metropolii Gdańskiej, Urząd Miejski w Gdańsku, Gdańsk 2009

of supporting companies and the development of high-tech sector are: the special economic zone and two science parks in Gdansk and in Gdynia.

Science Education Centre EXPERYMENT

There are many actions undertaken to encourage children and young people in the metropolitan area to learn through playing and to choose the path of engineering education. EXPERYMENT Science Education Centre in Gdynia (Pomeranian Science and Technology Park) is an interactive site, which main goal is to make science no longer a stress, but pleasure and fun. All of the processes occurring in nature are taught in an interactive way - by participating in experiments and creative exploration. Center is divided into groups of positions around different topics such as: environment, human, optics, sound, physics etc. EXPERYMENT is an interactive exhibit, designed so that everyone could easily move and engage in experiments. Each station is equipped with an information stand, which describes presented phenomenon. There are Science Educators working at the Center who can help, however, the idea here is to do a self-experimentation and discovery. The Centre has also a wide range of educational activities for organized school groups.



Source: Promotion materials of the Science Centre EXPERYMENT, <http://www.experyment.gdynia.pl>

Despite the relatively distant location of the region on the northern edge of Poland, Pomerania maintains strong ties with the nation's capital, developing new business opportunities. The high quality of life (the highest in Poland!) attract and helps to retain highly skilled workers in the region, especially those in the creative sector.

Regional conditions also affect a number of development opportunities associated with the events held locally, but which are relevant globally. One such type of event is the Football Championship Euro 2010, which will be held among others in Gdansk. While the construction of the stadium authority rests on the shoulders of Gdansk, the organization of such a large sporting event requires the involvement of all local cities, especially in the context of the organization of transport, accommodation, catering and public safety. Preparations for this event is happening not just in infrastructure sphere but also the cultural and business.

High science and education potential

In the region there are many universities which, together with research institutes, are the producers and reservoir of human resources for the whole northern Poland. The biggest share in the education of highly qualified staff in different specializations are public universities, namely: University of Gdansk, Gdansk University of Technology, University of Medicine and

the Maritime Academy. Every year grows the number of student on marketable technological-engineering, architectural, construction, IT and environmental protection specializations.

There is a rapidly growing number of students in higher art schools and in other universities in fields of study related to the culture but also new creative technologies like digital imaging, graphics, software etc. With the Fine Arts and Music Academy artists are trained in various fields of art and co-create the artistic atmosphere of the city. Are first and second degree arts schools are very popular - in the region there are over 40 such schools (data from 2007).

Not only universities, but also a number of research units shape the scientific potential of the metropolis, including 4 Polish Academy of Sciences research institutes and over 20 other (public and private) R & D units.

Gdansk Metropolitan Area in European networks

The capital city of the area is Gdansk - the world famous Hanseatic city which, thanks to its more than 1000-year history, location and enjoyed, coastal area potential is an important center for the Baltic Sea Region. Numerous monuments, natural attractions and the possibility of active recreation on the shores of the Baltic Sea brings every year about 1.5 million tourists, of which half a million are from abroad.¹⁷

Metropolitan cities and municipalities have developed a dense network of cooperation with the twin foreign governments. They cooperate with more than 100 local governments from three continents. Region is also an active member of organizations working towards development of the Baltic Sea Region.

There is little data on the specificity of cultural contacts undertaken by the cities of Metropolis in the context of European networks - these are mostly individual projects or events, in particular referring to the historical aspects of culture and the region of Gdansk (Hanseatic times, the II World War), inspired by institutions from different European cities.

The cultural profile of the region and metropolitan area

Cultural heritage

Pomorskie is one of the most important places on the cultural map of Poland. In addition to a variety of events from multiple areas of contemporary culture, folklore and reconstructions of historical events attract many tourists. Not only Gdansk, but the smaller towns in the Region have something to be proud of.

The Tricity area consists of three separate urban organisms, with surrounding municipalities working together and forming a single conurbation. First of all Gdańsk, the Hanseatic city of a thousand years of history, which was a localization of important events, such as the uprising of “Solidarity” movement. Special esteem of local people and tourists enjoys the Dominican Fair

¹⁷ Opracowanie na podstawie materiałów Urzędu Miasta Gdańska ww.gdansk.pl

held in August in the Old Town, where you can get regional articles, ancient ornaments, and other unusual items. In addition, Gdansk abounds in museums, art galleries, cinemas, cafés, clubs, restaurants and other places of entertainment and cultural events.

Further at the bay there is a holiday resort - Sopot, with splendid mansions and patrician villas of Gdansk, and Poland's longest pier. Sopot is the host of international festivals. Gdynia is a modern and thriving young city, built in the period between the World Wars. This coastal city hosts many interesting festivals, i.e. Polish Film Festival and the Gdynia Summer Jazz Days.

In the Pomeranian register of historical monuments there are almost 3,000 objects (as of 2005), the most of them located in the Gdansk-over 500. Polish objects are also on the UNESCO World Heritage List - among the 12 Polish sites one is located in the Pomeranian region - the Teutonic castle in Malbork.

Pomorskie region is unique in Poland in terms of their multilateralism and multiculturalism. There live the representatives of all nine recognized national minorities. There is also a separate category of community using the regional language – Kashubian. The size of this group is estimated at about 350-500 thousand people, while about 50 thousand people speak Kashubian language. This language was made a language of liturgy in several Catholic parishes, there have already been translations of the Holy Bible, prayers and psalms issued. Local radio and television broadcast programs in Kashubian or in two languages. Several elementary schools introduced language learning in the framework of regional education. There appear beautiful works of literature in Kashubian, and increasingly frequent popular science materials. Local press titles publish articles in Kashubian.¹⁸

The most interesting events

There is a number of cultural events organized in cooperation with the city of Gdansk, including:

- Gdańsk DocFilm Festival
- International Festival of Organ Music in Gdansk Oliwa (famous organ music location)
- International Festival of Open Air and Street Theatres "FETA"
- Sounds of the North - Folk Inspired Music Festival
- St. Dominics Fairs
- Gdansk Press Photo
- Yach Film Festival (prestigious Polish music videos event)
- Shakespearean Festival
- Gdansk Carillon Festival
- Gdansk Good Humor Festival
- All About Freedom - international set of events

¹⁸ Opracowano na podstawie materiałów ze strony <http://www.wrotapomorza.pl>

With the participation of Gdynia city there are many international events hosted, especially those related to music: JaZzGdyni, Ladies Jazz Festival, Gdynia Blues Festival, Heineken Open'er Music Festival, and related to film: Polish Film Festival and Transvisualia Festival.

Theatres in the metropolis have a rich repertoire and organize their own, often interdisciplinary festivals, such as Coast of Arts and BRUK - European Days of Street Art and Culture. The metropolis is famous in Europe for its festivals: Shakespeare, the International Festival of Street & Open-Air Theatre "Feta", Gdansk Festival of Dance. Municipal Theatre in Gdynia annually in the season invites to Summer Stage, where performances are presented in the beach arrangements, and the Festival of Rhythm and Fire - FROG. Region is famous for its off (alternative) theatre initiatives. Pomerania is also a strong center for modern dance.

Metropolis is also the Polish Film Festival, with over thirty years of history, cinema studies, discussion clubs, and outdoor film screenings in the open air and the beach. Every year festivals are crowded: Amateur and Independent Film Festival WYDMY, Polish Videoclip Yach Film Festival. Gdańsk Doc Film Festival is the next largest in the north Poland documents and report film festival. One of the newest, and already the flagship event is the Festival of Audiovisual and Multimedia Forms - Transvizualia. There is also a festival devoted entirely to the art of animation - Animation Now!¹⁹

Gdansk Metropolitan Area is the incubator of contemporary art. It is here that operate globally recognized Center for Contemporary Art "Laznia" and the Art Institute's "Wyspa". Here emerge new places, like, recently celebrating the first year of operation, the Gdansk City Gallery. There are workshops and residential projects held. Art defies museums and galleries, functioning in a public space in the form of numerous murals and happenings. The latest trends in design, you can track at the Gdynia Design Days festival and the Design, Interior and Applied Arts Fairs ABOUT DESIGN in Gdansk.

Freedom of Culture. Culture of Freedom. ²⁰

With this theme Gdansk, together with metropolitan area, wants to win the title of the European Capital of Culture in 2016. It competes with Warsaw, Torun, Wroclaw, Lodz, Szczecin, Katowice, Poznan, Lublin and Bialystok. In September 2010 an application document was handed presenting the candidacy of Gdansk and the Metropolis for the title. The proposal is a result of over two years work of several hundred people involved in the project. Many representatives of various communities and industries during several meetings were working on projects that were put in the application next to own projects, those created in collaboration with cultural institutions and NGOs, and those selected from the Bank of Ideas.

Freedom is an idea well established in the identity of city and the experience of the inhabitants, allowing for taking up the current topics interesting to every European. Recent history, the birth of a social movement "Solidarity", the tradition of open, Hanseatic city decide on the identity of this place. Gdansk as European Capital of Culture 2016 will show how to use

¹⁹ Materiały Biura Gdańsk Stolicą Kultury 2016 <http://www.gdansk2016.eu/>

²⁰ Podrozdział opracowany na podstawie materiałów Biura Gdańsk Stolicą Kultury 2016

the historical heritage to create a vision for the future. In case of Gdansk it is expressed in taking up current issues concerning freedom and solidarity.

Real changes in the city and the metropolitan area are already visible. These changes show that the title is treated seriously and Gdansk is able to truly carry out the project. The authorities have developed a comprehensive program designed to bring Gdansk to the title. These are the new events (festivals, educational projects, publications), but also initiated discussions, a strategic shift in cultural politics of Gdansk and the integration of communities. Due to the candidacy many new cultural initiatives emerged, including the Solidarity of Arts Festival, Narrations - Installations and Interventions in Public Space, The European Poet of Freedom, Monumental Art Painting Festival. Gdansk candidates with the support of the whole metropolitan area, which is considered a strength of the application.

In terms of "city and citizens" Gdansk pays special attention to projects aimed at improving the quality of public space. In terms of "European" important is the position of Gdansk at the intersection of historical routes connecting the continent on an east-west and north-south routes. Gdansk here refers to its history and port traditions, as the role of connector for Poland and Europe. Thematic threads of the program are the developments of idea, which determines the two pillars of the program. Under the "Freedom of Culture" there are topics: Debate, Solidarity of Artists, Communities on the Web, Outside the EU and Creations. "Culture of Freedom" refers to: Space, Leisure, Neighbors, Generations. Topics that make up the image of Gdansk candidacy is the public space as a common good, the democratization of that space through art, active participation in culture, liberating potential of digital media, the role of debate in the life of societies, free access to culture, solidarity on every day.

To create the project a variety of communities have engaged: art, science and business. ICT industry representatives supported the efforts of Gdansk through the sharing of ideas for interactive technology solutions. During several meetings they have together generated dozens of ideas for projects, which use new technology that could revolutionize the perception of culture and participation by the general public.

Strands of development in the Metropolis

Pomeranian economy is increasingly influenced by global European and national trends, both social and economical in their character. Analysis of these trends provides important information for predicting the future conditions for creative industries.

Pomorskie Region Development Strategy²¹ stresses the original multicultural character of the region, representing a mixture of Polish (including the Kashubian, Kociewie and Borderlands), Hanseatic, Ukrainian and others' heritage. It's material reflection are the numerous historical monuments and cultural facilities. Legacy of recent history, particularly the political changes initiated by "Solidarity" movement in Gdansk, opened a new way for Pomeranian democracy, freedom and self-governance as a fixed value of civil society.

The development of creative industries will be affected by activities related to the implementation of the following priorities and strategic objectives of Strategy:

- **COMPETITIVENESS** - The impact on a strong and stable position of the region in Europe by: entrepreneurship, innovation and new technologies, development of an active knowledge-based society, improving the attractiveness of the settlement, investment and tourism, i.e.by:
 - supporting the development of regional cultural industries;
 - promoting business innovation;
- **COHERENCE**- The impact on reducing disparities within the region in the area of social, economic and spatial development, i.e.by:
 - promoting citizenship and pro-social activities;
 - supporting efforts to strengthen diversity and regional identity;
 - preservation of traditions of the sea and history, including solidarity;
 - supporting the development of culture and people of the region to improve accessibility to the cultural offer;
 - revitalization of degraded urban areas
- **ACCESSIBILITY** - Ensuring the mobility of people, the availability of services and the efficient and safe movement of goods, information, knowledge and energy with effectively functioning infrastructure, resources and respecting the values of the environment, i.e.by:
 - modernization of equipment and supporting the activities of cultural institutions;
 - supporting the operation and development of integrated information systems in culture.

²¹ Strategia Rozwoju Województwa Pomorskiego na lata 2004-2013, Zarząd Województwa Pomorskiego, Gdańsk 2005

Economic development- cross-sectoral linkages

Traditional sector analysis of the economy has significant limitations when it comes to defining and forecasting the development. Cooperative relations are increasingly cross-sectoral, and the need to meet the challenges of innovation and knowledge-based economy necessitates the cooperation with science. Forecasting the development of one of the sectors by looking only through a narrow prism of the sector may prove insufficient. Therefore, the cluster approach allows to analyze the development and labor market needs in a much better way- taking into account the increasingly complex cooperative relations.

Studies carried out in 2007-2008 led to the identification of 11 cluster concentration groups in the region. They are present both in traditional industries and high technology sectors. They are characterized by varying degrees of innovation and technological advancement and the varied perspectives and approaches to development:

- Agro-food
- Construction
- Maritime / Shipbuilding
- Jewelry
- ICT
- Tourism
- Logistics-transport-distribution
- Wood and furniture
- Chemical
- Metal
- Machine-tool industry.

Demographic change - an aging population

The strength of the regional labor market determines a favorable age structure of population. Nearly two-thirds of the population in metropolis is in productive age. However, projected growth in the number of people at retirement age, residing in the Pomeranian region, will be dynamic. This group amounted about 300 thousand people in the region in 2003 (the base year for projections). In 2020 a number of people in this age group will increase by 186 thousand and in the next decade will level at 553 thousand. At the same time there will be a gradual decline in the population of people in the working age and pre-working age. On the other hand Pomerania, a region where the proportion of young people in the total population is large, will feel the drop in the number of births relatively less painful than other regions. Furthermore, the professional activation of women will proceed, which may increase the supply of workers in the market.

Preservation of cultural heritage and spatial development

The Regional Operational Programme for Pomorskie for 2007-2013 supports the increasing attractiveness of urban space and a comprehensive revitalization projects. Also the Tourism Development Strategy for the Pomorskie region aims at building branded tourist products

based on cultural heritage assets and supporting the promotion of branded products of the region. In order to protect the cultural potential of the region and the appropriate use of it a spatial development plan was created. This document supports the preservation of historical heritage and the promotion of traditional regional architecture (in terms of shape, architectural details and finishing materials, development of architectural stencil designs based on traditional building).

Broad defined trends in the field of regional cultural heritage therefore will aim to:

- increase the awareness and social acceptance in the sphere of culture;
- identification with the "little homeland" multicultural society;
- revitalization of urban areas, generating economic recovery and job creation;
- use of financial resources to rescue buildings of special historical value;
- protection and promotion of traditional regional architecture forms and features;
- stimulate the principles of public-private partnership with the entrepreneurs sector;
- encourage the local activity to preserve their autonomy and identity.

However, there is lack of a coherent and consistently implemented strategy to promote the use of cultural heritage to enhance the awareness of history and regional identity, and enhance the attractiveness of settlement, tourism and investment in the region. There are no activities planned aiming at developing "areas of art" or revitalization for the needs of creative activity.

Changes in the labour market

Pomeranian region has a population of 2.2 million, of which 1.2 million within the metropolitan area. Number of persons employed in the Pomorskie at the end of 2006 amounted to 690 000 people. More than 60 percent. of them were employees of the service sector, 24.9 percent. Were employed in the industry. Employment in agriculture, hunting, forestry and fishing stood at 9.0 percent., in the construction sector at 6.0 percent. It is estimated that during 2006-2015 the number of employees in the Pomorskie region will increase by 45 000. By 2012, annually there will be more and more jobs created. In later years, the observed increases will be not higher than 7 thousand. positions, in percentage not exceeding 1 percent of the number from the previous year. Sectoral employment growth will vary. Continuation of trends observed in previous years is expected. The importance of agriculture and industry will probably drop. The employment in construction and services is expected to grow dynamically.

Currently, the unemployment rate in the region is about 13 percent (total number of unemployed is about 90 000 people). However, in the main cities of the metropolis the unemployment rate does not exceed 5 percent (2 percent in Sopot). Opinions of Pomeranian employers regarding the future of the labor market is mixed. On the one hand the good economic prospects are pointed out, on the other hand, the possibility of creating new jobs is approached with caution.

The liberalization and internationalization of trade, closer cooperation²²

The increasing openness of economies and networking activities set new challenges for the economy –i.e. a need for new skills, due to a change in the structure of industry and labor. Also the professional consequences of migration must be met. For companies in the creative industry it creates an opportunity to enter new markets, attract foreign investment to the region, thus - the opportunity to establish broad international contacts. Region has a chance to become a location of more international companies branches and increase the value of exports of regional creative businesses and expand the circle of their customers.

Further integration within the European Union

On one hand, major investments financed from EU structural funds on the other modernization of the companies (raising funds for innovation), create a demand for a new type of creative services. The emphasis on innovation and a growing awareness of regional authorities in the context of supporting research and education, encourages the companies to take part in many projects and programs. In parallel, closer European integration is progressing, changing the legal framework for the functioning of entire industries, eg in the context of movement and protection of intellectual property rights.

Servicization

The growing importance of services is reflected not only in shifts in the sectoral structure of the economy, but also within sectors - servicization of industry, construction and agriculture means the need to build new competencies, combining professional skills closely with the more universal, interdisciplinary ones. Engineer, artist or scientist must have also the competence in the management and marketing.

The share of industrial sector and production workers in the economy of the region decreases. At the same time a part of the manufacturing sector workers perform duties de facto standard for the service sector - for example, being a managerial staff, administration, business or conducting research or market research for a particular industry. Servicization of the industry will progress, and with it the demand and spending on research and development activities will increase. Therefore the marketing skills, the ability to define customer needs and customer service will gain in importance.

Enrichment of the population

Gdansk Metropolitan Area, and especially its center, the city of Gdansk, Gdynia and Sopot are among the richest regions in Poland. They are at the top places in terms of own revenues of local governments per capita. Higher incomes of people mean not only spending more on luxurious items and travel, but also a greater interest in healthy lifestyles and culture.

²² Nowicki M. (red.) Pomorska Mapa Zawodów I Umiejętności Przyszłości Instytut Badań nad Gospodarką Rynkowa, Gdańsk 2008

Social and economic development will create demand for new services and goods. Cultural industries, tourism, luxury goods and services will develop rapidly creating new challenges for economic competence. Organizing the Euro 2012 Football Championship will be associated with the development of such services like MICE (Meetings -Incentives-Conventions-Exhibitions), i.e. any kind - even nonsport- events, meetings, exhibitions and conferences.

New technologies

Information and knowledge becomes the primary resource of a competitive economy. The modern structure of the competence of creative industries must contain the search and selection of information, inference and synthesis as well as building "knowledge networks". Increase in innovation of the economy requires the development of high-technology industries. They require the highest, often unique, competences but also social skills (including communication and collaboration in international systems.) Broad computerization enters almost all occupations and industries. In the future, this process will rapidly become severe, the ICT skills are already a basic competence in creative industry.

Among important elements of the development of knowledge-based economy are the Centers of Excellence. There are over a dozen in the metropolis and one of them is the Wicomm Center of Excellence, specializing in wireless communication technologies. Cooperation with companies, experience in designing and implementing innovative technologies and an initiative in integrating the business, scientific and public sector under the Wicomm CoE contributed to the creation of Pomeranian ICT Cluster - key cluster in the Pomerania region and fastest growing cluster in this sector in Poland.

Changing nature of work management and changing labor relations

As a result of the above-described process the management of work and the position of the employee against the employer changed. Employees of the XXI century must be mobile (both in terms of readiness for "wandering in search of work" and changing the nature of work or even to retrain) and flexible (in terms of time devoted to their duties and work in different teams). Employees are rarely controlled by their employer, but they are responsible for the work done, and therefore must be able to effectively plan individual tasks and demonstrate a self-discipline in their implementation. The importance of these skills increases more and wider use of remote working. Increasingly, the experience and competence of workers is more important than their education.

Internationalization

The increasingly widespread presence of foreigners - including investors from Asia or emigrants from Ukraine, Belarus and Russia - will determine the increase in importance of such competences like foreign languages other than English, knowledge of foreign markets, as well as realities, cultures and customs, and the skills of tolerance and ability to work in a diverse group.

Creating a vision for the future

Pomeranian region has an extensive institutional base of culture, but its use is not sufficient to render the metropolis as a cultural center similar to Warsaw. Gdansk Metropolitan Area is at the moment in which it needs vision for changes, not to become a historical monument. There are efforts to show that the metropolis is mainly those artists which are creating and residents actively participating in cultural events. It is a place where diverse and original projects are created. Particular attention is paid to projects taking place in neighborhoods close to the residents, based on education and employing the methodology of workshops. Many events in the metropolis, were created thanks to the commitment of individuals, NGOs, groups of creative or independent entertainers who know best the needs of the environment.²³

An example of new trends related to the creative industries in order to develop the potential of culture is a web portal Gdansk OdNowa (literary: Gdansk from other side), which was launched in 2010. This is an alternative map of Gdansk created from stories told by its inhabitants. On the map, they can post descriptions and photos of their favorite places. The content that will fill the whole portal will be created by the people through the internet site. The idea originated during the workshop Future City Game, which took place in 2009. The workshop was an accompany event by the NARRATIONS festival, and its subject was the activation of the residents and promotion of cultural events.

NARRATION Festival is an artistic project, which aim is to create space for searching and reading the narrative written in the urban tissue and the creation of new urban stories. An important dimension of the festival is to highlight the potential of cities as a common public space, shaped by art. NARRATION 2009 held projects in the field of visual arts and technology using light: video projections on specific landmark buildings of Gdansk, artistic interventions in public space, video-installations in shopping windows and in the interiors of Gdansk galleries and cultural institutions.²⁴

Referring to the cultural environment of metropolis affecting the development of creative industries we encounter a barrier in the form of incomplete data, taking into account only the traditional institutions of culture dissemination. This raises the problem translating the performance of the institutions to general phenomena of creating and participation in culture (lack of data on non-institutional forms of culture.) There is also a challenge to classify the events organized by the new types of institutions: non-profit groups and mass events organized outside cultural institutions through i.e. the festival offices.²⁵

Additionally, in the scope of the creative industries environment, the phenomenon of art and culture going outside traditional institutional spaces, and issues related to the art of "underground" or the street should be taken into account. The development of creative

²³ Materiały Biura Gdańsk Stolicą Kultury 2016 <http://www.gdansk2016.eu/>

²⁴ Materiały Biura Gdańsk Stolicą Kultury 2016 <http://www.gdansk2016.eu/>

²⁵ Chlebnicki M. Zróżnicowanie instytucjonalnego kapitału kulturowego miast polskich, Ośrodek Statystyki Kultury Urząd Statystyczny W Krakowie

industries will be influenced, among others by blurring of boundaries between: culture and entertainment and art and the commercialism. There are also dynamic, uneven and multi-directional transformation in cultural and institutional capital. In connection with the qualitative changes in the society and civilization, we therefore need a new vision and creativity, based on both the creative industries and the institutional culture - indicating the new organizational structures, forcing "networked" cooperation of various entities.

Gdansk – the World’s Capital of Amber

Baltic amber has played an important role in the history of Europe, contributed to the development of culture. Earlier, in the purpose of obtaining amber, people went north from distant parts of the world. This was an opportunity for cultural contacts. Amber is the best known fossil resin - with the longest traditions and literature dating back to antiquity. Lumps of amber found practical application in the production of medicines and cosmetics.

The largest deposits of amber (succinite) are located in Europe, around the Baltic Sea. Amber nuggets found on the Baltic beaches, or extracted in the opencast Sambian mines are solid resin of coniferous trees. Particularly valuable are the pieces of amber with preserved elements of plants and animals frozen before millions of years, so called inclusions. On the basis of inclusions preserved in amber nuggets, paleontologists have identified more than 300 species of plants and thousands of species of ancient forests²⁶.



Source: Izabela Gutowska

Pomeranian region, and especially Gdansk, is the largest and strongest in the world center for jewelry - amber industry. It is estimated that region accounts for almost 80 percent of world exports associated with the silver and amber jewelry. Manufacturing jewelry is significant in terms of specialization of Pomerania and its global competitiveness. The industry employs according to official statistics 3 000 people in 1 200 companies, but the industry as a whole is estimated by professionals at 10 000 of employment in the region. The industry is one of the fastest growing in region in terms of the dynamics of the number of entities, employment (an increase of over 30 percent. in the years 2000-2006) and the share of exports in production sold (more than 80 percent.).

Besides the fact that amber jewelry from centuries is a unique showcase of the region and an important tourist attraction, this sector is vital to the economy of Pomerania. The total value of production of companies in this industry, mostly made for export, is about 1 billion PLN – about 250 millions Euro (estimates from 2007), which puts amber industry in the creation of regional GDP next to the maritime industry. The sector has achieved significant growth in recent years, whereas in 1990, about 700 people lived out of the amber processing. Usually these were small craft businesses. Some of them today widely expanded the scope and extent of the market. Production of companies is purchased mainly by foreign customers (80-90 percent of production is exported - estimates for the year 2007).

The global importance of the industry is underpinned by the fact that the World’s Amber Council is based in Gdansk. The organization deals with issues associated with the wider

²⁶ Gronuś-Dutko B. Europejskie Szlaki Bursztynowe, scenariusz prezentacji, przygotowanej na Konferencję Miast Partnerskich – Cztery Kraje Jedna Europa, Rabka 2009

marketing of raw amber and jewelry around the world and promoting its natural beauty and characteristics. Currently, the Council consists of 14 scientific authorities from Poland, Ukraine, Germany, Russia and Canada. Through intensive collaboration with the industry, science sector and the support of the City in 2007 there was appointed an inter-department Jewelry Design Chair Profesorship at the Academy of Fine Arts in Gdansk.²⁷

In addition to the economic importance the industry is significant also in the potential and number of organizations of culture, education and institutions from the sphere of business, whose activities revolves around the amber. For several years there is the Amber Museum operating in Gdansk. Collection has been created since 2000. Modern expositions placed in the historic building called Gdansk Barbican represent collections of natural specimens, traditional crafts, artwork. Presentation in the display cases are accompanied by numerous multimedia. The Museum recently was enriched by an impressive art collection of Gdansk's masters of the XVI - XVIII centuries. In addition to permanent exhibitions the museum has a variety of temporary exhibitions and is also involved in organizing traveling exhibitions. The museum organizes frequently shows of old techniques of amber processing. Also in the Archaeological Museum of Gdansk there is a permanent exhibition titled "With amber through millennia."

Amber has become a magnet for tourists. Rich museum collections and the traditions of amber extraction and processing are the basis for the design of contemporary cultural-tourist routes. Under the frames of protection of cultural heritage of Europe in the 90s, there was a program on the designation of tourist routes created. It refers to the ancient trade routes, connects cities and towns that in some way were affected by amber- associated activities. Currently in Poland and in Europe there is a network of amber tourist trails. These roads usually meet in Gdansk - the World's Amber Capital.

Contemporary artwork



Source: Firm Art7

Annually for 16 years now there are the world's largest International Fair of Amber, Jewellery and Gemstones Amberif taking place in Gdansk. The fair involves around 450 exhibitors and about 6 000 guests. Accompanied by a spectacular "Fashion and amber Gala" and "Designers gallery"- a fashion and jewelry show, prepared by famous fashion designers in collaboration with jewelry designers. There are also international competitions for artistic jewelry with amber taking place and numerous seminars and exhibitions to promote modern design. Since 10 years they are also Ambermart fairs organized.

²⁷ Opracowanie własne na podstawie materiałów ze strony Gdańsk Stolicą Bursztynu www.stolicabursztynu.gdansk.gda.pl

Masters of arts and crafts, as well as visual artists create an original jewelry and functional objects highlighting the interesting, natural contours, the composition of colors and the streak drawing of amber. The effect of creativity of artists and material specificity is recognized by individual purchasers, as well as collectors. Inspirational qualities of amber and the specificity of work on the silver frame are a base to the organization by various institutions and specialized schools, a series of competitions and art workshops.

Many manufacturers, designers and wholesalers of jewelry recently noticed a significant change in creating the image of amber and jewelry made from it: 10-20 years ago, amber did not enjoy too good reputation and was regarded as a traditional and uninteresting stone. Relatively recent avant-garde artists rediscovered the amber and perform with it contemporary jewelry collections targeted at both women and men. Due to modern processing techniques, color palette in line with current trends, as well as exceptional lightness of amber, very attractive piece of jewelry can be conjured up. Not without significance is the fact that the price of amber jewelry – despite the last three years raw material problems and increase in price on average by about 40% - is still attractive, especially compared to the jewelry adorned with other precious stones.



Source: Firm S&A

Promotional activities of the producers themselves is strongly supported by cultural institutions, especially museums and the media – from the press, through television and radio, to the extremely successful web publication. Today, silver jewelry with amber is one of the most recognizable and associated with the country Polish products. Objects decorated with amber are among the most frequently ordered and are often given as diplomatic gifts for foreign guests. Such resources and unique skills of the Metropolis in the production of amber jewelry offer a chance for industry growth through business, cultural and educational events. Comprehensive promotion will open up new export opportunities for the highly fragmented environment of micro and small enterprises, which have so far developed almost exclusively by its own forces and resources.

Analysis of the creative industries in the economy of the Gdansk Metropolitan Area

Portrait of the creative industries sector

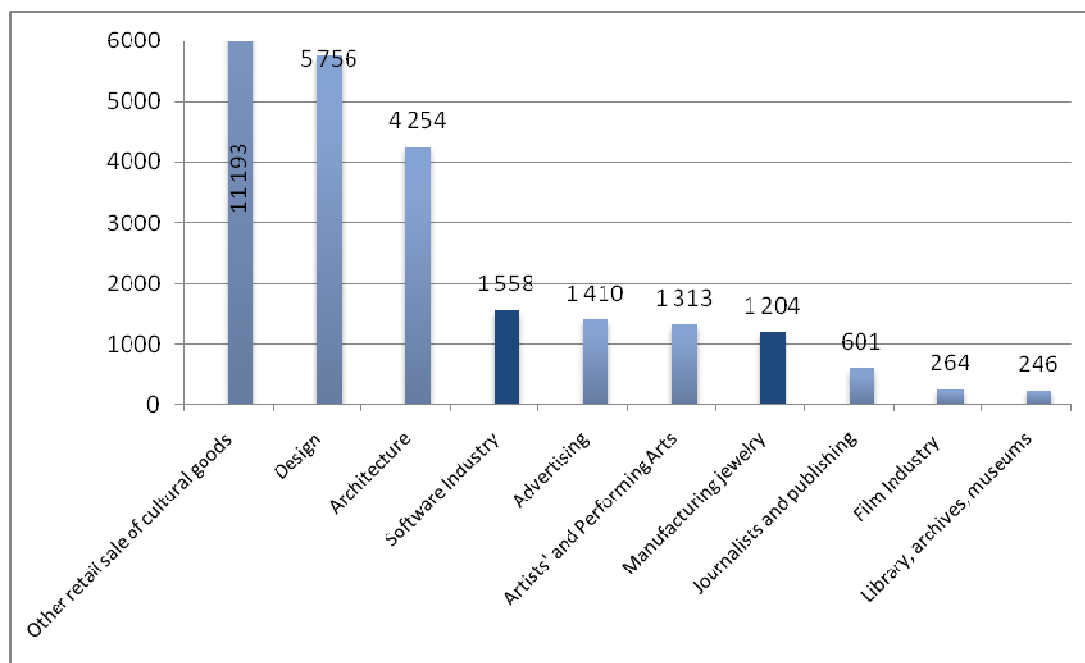
The private sector

Portrait of the creative sector in the economy of the Gdansk Metropolitan indicates the existence of a base for development of this sector in the form of a critical mass of companies and employment, as well as extensive supportive environment. The specificity of competence indicates that development of creative industries in the Gdansk Metropolitan Area can be endogenous and based on local human and institutional potential.

Creative industries contribute significantly to the economic structure of the metropolitan area and the entire region. In 2000, in the Pomeranian economy functioned almost 24, 000 of entities in creative sector. In 2006 this number increased to nearly 28, 000 (almost 17 percent growth). The industry accounts for a total of 13 percent of all private entities in the region.

Number of people employed in creative industries in the Gdansk Metropolitan Area is 46 000 people, and throughout the region over 63 000 people. It is about 8 percent of total employment in enterprises in the region.

Drawing 1 The number of entities in different sectors of creative industries in the Pomerania region in 2006.

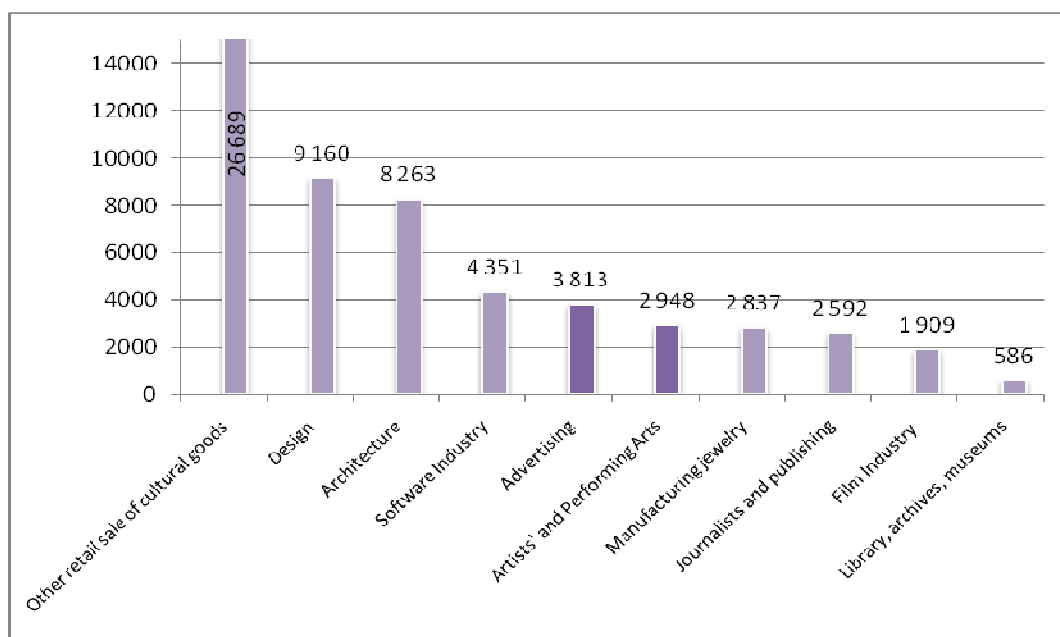


Source: Own calculations based on national data, the first data point shift on the chart was made for presentation purposes.

Creative industries

From the viewpoint of the structure of entities the subbranches most often represented in the creative sector are: retail sales (i.e. of cultural goods), design services, architecture. These three sectors account for about two thirds of the number of entities in the creative industries in region. Less importance in terms of number of entities have operations in the industries like: software, advertising, artists' and performing arts, manufacturing jewelry. The lowest rates of entities relate to the industries: journalism and publishing, museums and other cultural activities, film industry.

Drawing 2 The number of employment in different sectors of creative industries in the Pomerania region in 2006.



Source: Own calculations based on national data, the first data point shift on the chart was made for presentation purposes.

Although the largest share in the creative sector in the Gdansk Metropolitan Area and throughout the region of Pomerania in the number of entities and employment is in retail sales of cultural goods (includes retail sales of books, records, musical instruments and art pieces), qualitative research indicates that it has little relevance in terms of exports, value added and innovation capacity.

Another sector with a great potential in terms of number of companies (more than 20 percent share among the creative companies) and employment is the sector related to the design and organizational services (also called design). These sector includes, among others, design of clothing, shoes, jewelry, furnishings, trademarks, engineering design, organizing exhibitions, fairs and photographic services. A large share of this sector in the creative industries can be a signal of a significant potential of the region in terms of design and new product development.

Another sector of great importance for regional economy is architecture. The industry has about 15 percent share in the number of enterprises and employment in creative industries in

the region. An important base for the development of this sector is the pool of talent delivered by a strong scientific and educational center which is the Faculty of Architecture at Gdansk University of Technology.

Industry with a relatively large number of entities and employment, and great importance for the development of the region is the software industry, represented by more than 1 500 entities and nearly 4 000 employees. This industry is part of a broader ICT industry (Information and Communication Technology), which is already essential to the development of Pomerania and is expected to further increase its importance. Software sector, despite periods of downturn in the global market, noted the biggest increase in the number of enterprises of all sectors of analyzed creative industries (by almost 50 percent in the years 2000-2006).

Advertising is a sector with smaller share in the creative industries in terms of number of entities and employment (nearly 1 500 companies and over 2 500 employees) but it is one which have the strongest relationship with the creativity and culture. Advertising is no longer a factor that is needed for the product for it to "sell", but it is one of the stages of creating and shaping an idea or a prototype, as well as manufacturing and commercializing the product.

One of the most interesting sectors in terms of personal creativity is the artists's and performing arts industry, including artistic, literary and stage activity. The specificity of this sector, in particular stage subsector, makes it localise mainly outside the metropolis – it acts to some extent as a substitute to the cultural activities concentrated in large cities. In the metropolis there is a literary activity developing dynamicaly. People of Gdansk - no matter whether by birth or by choice - often portray the city and region on the pages of their novels and volumes of poetry..

Journalism and publishing industry is underrepresented in the region due to their specificity. Print media and music are mostly domain of large international capital groups, most of which is established / has a branch in Warsaw. In the Pomeranian region there are more than 600 entities in information and publishing industry identified, employing nearly 2 000 employees. In the case of publishing houses, there are several champions in the market, mainly book publishers, but most of publishing companies are medium, small and very small - primarily publishers of niche newspapers and magazines.

The film industry next to the information and publishing sector is characterized by a lesser importance in the structure of creative industries in Pomerania, mainly due to the lack of tradition of film, a relatively small number of companies and employees. The sector includes such diverse subsectors like production of films as well as their projection (cinemas). Among the producers' companies only a few deals with creative production of films for corporations and institutions - most offers amator video services for individuals.

The smallest among the branches of creative industries in terms of number of entities is the "Museums and other cultural activities" industry that include museums, libraries, cultural centers and other cultural institutions. Employment in relation to a small number of entities indicates the specificity of the industry as a set of rather larger institutions that meet the social and cultural functions. It should be noted, however, that more and more entities such as

museums engage in business activities related to the sale of souvenirs or the organization of cultural events, not only in order to fund their cultural activities but also to generate profit.

Industry that does not fall within the scope of “common” creative sectors established in the project but is important in terms of specialization of Pomerania and its global competitiveness is the production of jewelry. The industry employs according to official statistics 3 000 people in 1 200 companies, but the industry as a whole by professionals is estimated at 10 000 of employment in the region. The industry is one of the fastest growing in region in terms of the number of entities, employment (an increase of over 30 percent in the years 2000-2006) and the share of exports in production sold (more than 80 percent.) Details on the industry are in the subsection - Gdansk World’s Amber Capital.

Growth dynamics

The largest growth rate in the number of entities has been shown industries like: software (an increase of almost 50 percent within 5 years), advertising (an increase of 45 percent), journalism and publishing (an increase of 35 percent) and manufacturing jewelry (33 percent). The smallest growth rate in this period was recorded in design, film industry, artists and performing arts.

Drawing 3 The number of entities in different sectors of creative industries in the Pomeranian region in 2000 and 2006 and the growth rate in percent (2000-2006)

Branch	Year		Growth rate in percent
	2000	2006	2000-2006
Other retail sale of cultural goods	9 951	11 193	12,5
Design	5 538	5 756	3,9
Architecture	3 472	4 254	22,5
Software	1 050	1 558	48,4
Advertising	971	1 410	45,2
Artists and performing arts	1 174	1 313	11,8
Manufacturing jewelry	904	1 204	33,2
Journalists and publishing	447	601	34,5
Film Industry	240	264	10,0
Museums, libraries, archives,	217	246	13,4
TOTAL	23964	27799	16,7

Source: Own calculations based on national data.

Spatial distribution

Taking into account the spatial distribution of activities related to the creative sector, there is a strong concentration of activities in major metropolitan cities. More than 73 percent of sector employment is concentrated within the metropolitan area. The most spatially concentrated

activities (more than 90 percent.) were manufacturing jewelry, as well as software production. However, there are signs showing the ongoing process of suburbanization.

To examine the degree of concentration of the creative industry in the region in relation to the rest of the country in this study we used the location quotient LQ. It is calculated on the basis of data on the number of employees (see methodological part.) The quotient is used for location identification and mapping of potential clusters.

Analysis of the indicators in creative industries showed that the greatest degree of concentration in the region compared to the national average is shown in the manufacturing jewelry. Location quotient, in this case exceeds the average for the country over 14 times. Another industry with a significant concentration of employment is the software industry - in excess the average identify for Poland up to 5 times. This indicates a strong potential for developing a regional specialization in this field. Both qualitative data and collected expert opinions suggest that the most dynamic sectors between the creative industries, which has strong potential to become a specialization of the Gdansk Metropolitan Area and a basis for cluster development is the software industry as a part of a broader ICT industry.

Public Sector

An important aspect of the development of creative industries in Pomerania region is the existence of cultural institutions, whose activities generate positive externalities in the form of stimulating the development of creative industries. Number of institutions in the broader culture run by the private sector is small and more than ten times smaller than the number of institutions run by public sector entities.²⁸ Therefore, the development of culture as the environment for creative industries is still dependent on the level of state budget and local government units spending, and only to a small extent the result of private sector investment. In average local government accounts for almost 80 percent of public expenditure on culture, the state budget in this case involves about 20 percent.

Pomorskie Region Development Strategy²⁹ promotes the development of culture and improve the accessibility of the region's population to the cultural offer. The region's government announces every year an open call for tenders to carry out public functions, that contribute to the development of culture in the region. Competitions can be organized by all local government units, cities, municipalities and county authorities.

Financing covers:

- projects for maintaining and disseminating the traditions of the region of Pomerania;

²⁸ Jakub Głowacki J. et al. Finansowanie kultury i zarządzanie instytucjami kultury, Ministerstwo Kultury i Dziedzictwa Narodowego, Kraków 2009

²⁹ Strategia Rozwoju Województwa Pomorskiego na lata 2004-2013, Zarząd Województwa Pomorskiego, Gdańsk 2005

- artistic projects at regional, national and international levels, carried out in accordance with the cultural policy, which are essential for the promotion of culture of the region in the country and abroad,
- promoting the works of Pomeranian cultural artists;
- protection of folk culture and the amateur artist movement, including protection of unique, vanishing professions and artistic skills,
- promoting culture of national and ethnic minorities;
- enrichment in art education and cultural education;
- initiatives aimed at improving the forms of governance and mobilize domestic and foreign funds for the implementation of cultural projects,
- promoting a system of monitoring of the cultural life of the region.

These actions can be implemented in various forms of: festivals, performances, competitions, exhibitions, retreats, sessions, conferences, seminars, workshops, screenings and other events as well as low-cost, non-commercial publications using a variety of recording media. Pomorskie region government awards scholarships to persons engaged in artistic creativity and the dissemination and protection of cultural property of great importance for the region. Scholarship are granted to implement a specific art project. Pomeranian Marshal may, upon written request of the organizer, embrace a cultural project held in Pomorskie with patronage.

Expenditure by Pomeranian different government units on the selected forms of cultural activities in 2008 amounted to almost 350 million PLN (almost 90 million Euro).

Expenditure of Gdansk city itself on culture and national heritage protection made up 55.4 million PLN in 2008 while in the city budget for 2010 there is earmarked 38.9 million PLN for this purpose (almost 10 million Euro). From that sum 15 million PLN will be allocated to construction of the European Centre of Solidarity and 5.3 million PLN for the construction of new Shakespeare Theatre. Among other expenses the largest share of cultural expenditures goes on museums, libraries and activities related to the protection and preservation of historical monuments.

The city of Gdansk twice a year announces an open competitive call to carry out the tasks in the field of culture, arts, protection of culture and tradition. There are several institutions and non-profit organizations taking part in the calls. In the competition for the 2009 grants were awarded to 68 projects totally amounting to 1.9 million PLN (almost 500 000 Euro). Organizations which have received support are art schools like the Academy of Fine Arts, public institutions such as the Baltic Centre for Culture and the Polish Baltic Philharmonic but also cultural, music, theater associations and those cultivating the traditions of national and ethnic minorities.

The share of expenditure on culture and recreation in the metropolis' second largest city - Gdynia is 40.8 million PLN (about 10 million euro).³⁰

³⁰ Biuletyn informacji publicznej miasta Gdyni. www.gdynia.pl/bip/budzet/

Cities of metropolis see new, ambitious goals for cultural policy. Hence, such an initiative like the creation of Gdansk Cultural Council. The Council is an advisory and consultative body and their members are active artists and cultural animators, representatives of the creative environment and media operating in the city, serving and supporting the development of cultural initiatives throughout the Metropolis.

Pomeranian institutions participate in competitions for grants published by the Ministry of Culture. Under the patronage programme in 2010 grants were awarded to such institutions from the region as:

- Polish Baltic Philharmonic in Gdansk – Grant for maintenance of musical instruments and accessories in the amount of 33 000 PLN
- Museum of Central Pomerania in Słupsk – Grant for modernization of the permanent exhibition in order to protect the cultural heritage of folk Slovincians - nearly 44 000 PLN.

Network of cultural institutions

The number of cultural institutions located only in major cities of Gdańsk Metropolitan Area is approximately 150 (depending on the year and the scope of the study), which puts the metropolis next to other metropolitan areas with a high number of institutions such as Krakow and Wroclaw.

The network of cultural institutions, whose activities stimulate creative sectors are:

- Museums - 57 (almost 2 million visitors in 2008)
- Galleries – 16
- Theatres and music institutions - 14 (almost three thousand events in 2008)
- Cinemas - 23, including 60 screen rooms
- Libraries – 330.

Studies of participation in culture clearly show that the most common, and in many cases the only source of contact with the institutional culture, in particular in the less urban areas remain libraries. In the Pomeranian region operates more than 330 libraries. Transforming these institutions into centers of multiformat culture, knowledge, education and information, seems necessary.

Museums, until today considered the most conservative cultural institutions are developing within their primary function (preservation, collection development) and they are also actively promoting their resources and conduct cultural education. They organize projects of scientific, popular science, art and publishing character, sometimes far from their main tasks. There were 57 museums and museum branches located in the region in 2008. In their frames there were over 200 own (home and abroad) and more than 100 other collections exhibitions organized. Pomeranian museums attracted nearly 2 million visitors in 2008, which puts our region in third place in Poland behind the Mazowieckie and Malopolska regions.³¹

³¹ Kultura w 2008r., Główny Urząd Statystyczny, Warszawa 2009

Metropolitan museums have rich collections of the art of Gdansk, Dutch paintings, amber and other artifacts. There are also interesting temporary exhibitions organized. Most visited museums and exhibition institutions in the region are:

- National Museum in Gdansk,
- Historical Museum of Gdansk,
- Amber Museum in Gdansk,
- Archaeological Museum in Gdansk,
- Maritime Museum in Gdansk and Gdynia,
- Naval Museum in Gdynia,
- Museum of the City of Gdynia,
- Museum of the City of Sopot,
- Aquarium in Gdynia,
- Zoological Garden in Gdańsk.

In the region there were 16 galleries operating in 2008. Half of them were organized by the public sector (local government) and half by the private sector (civil society organizations, individuals and others). Most are located in Gdansk and the other two major cities of the metropolis. As part of its exhibition activity there were nearly 200 domestic exhibitions, including 40 related to the "new media" or non-traditional exhibits, forms and techniques such as computer animation, interior space (installation), design and video, organized in 2008. In addition there were dozens of international and foreign exhibitions organized. Nearly three-quarters of all exhibitions were organized in state and local government –led galleries.

The most important galleries and cultural centers include:

- Zak Club in Gdansk,
- Center for Contemporary Art "Laznia" in Gdansk
- National Gallery of Art in Sopot,
- Art Institute's "Wyspa",
- Baltic Sea Culture Centre in Gdansk,
- Contemporary Art Gallery Triada in Sopot,
- Sierakowsky Residence in Sopot,
- Gdańsk Archipelago of Culture „Plama".

Another important group of cultural institutions contributing to creating conditions for the development of creative industries are theaters, philharmonic, operas and operettas. In the region there are 14 theaters and music institutions operating, having a total number of 27 scenes and offering more than 5 200 of seats in permanent halls. Among the total number of entities - 7 are dramatic theaters, 2 music theatres and 5 musical institutions such as philharmonic, choirs and orchestras. These institutions organized in 2008 nearly 3 000 performances and concerts, which gives the region, unfortunately, distant 9th place in the country in this respect.

The most important theater and music scenes in the region are:

- "Wybrzeże" Theatre in Gdansk
- Musical Theatre of Danuta Baduszkowa in Gdynia,

- Municipal Theatre of Witold Gombrowicz in Gdynia,
- Atelier Theatre of Agnieszka Osiecka in Sopot,
- Cameral Stage in Sopot,
- Miniatura Theatre in Gdansk,
- Sopot Off Alternative Scene in Sopot,
- National Baltic Philharmonic of Frederic Chopin in Gdańsk,
- Polish Baltic Opera in Gdańsk,
- Polish Cameral Philharmonic in Sopot.

In the region there are 23 cinemas nearly 60 screens and nearly 15 000 seats operating. In the metropolitan area there are 4 cinema complexes (multiplexes) and several smaller cinema screens. Metropolis is hosting annually the Polish Film Festival, with over thirty years of history, cinema studies, discussion clubs, and outdoor film screenings in the open air and the beach. Every year festivals are crowded: Amateur and Independent Film Festival “Wydmy”, Polish Videoclip Yach Film Festival. Gdansk Doc Film Festival is the largest in north Poland film documents and report film festival. One of the newest, and already the flagship event is the Festival of Audiovizual and Multimedia Forms -Transvizualia. There is also a festival devoted entirely to the art of animation - Animation Now!³²

The institutional base is not sufficient to treat the Gdansk metropolis as a cultural center similar to Warsaw. With this in mind local governments take action to modernize and expand existing infrastructure. The most important projects in this area are:

- construction of a European Solidarity Centre in Gdansk, <http://www.ecs.gda.pl/>
- Hewelianum Center - an adaptation of historic military complex in Gdansk to become an education and recreation center,
- Amber Road - reconstruction of the Roman trading post near Gdansk;
- expansion of the National Museum in Gdansk,
- modernization of the Forest Opera in Sopot,
- construction of an early medieval settlement in Sopot,
- construction of the Gdynia City Museum and Naval Museum in Gdynia,
- construction of Second World War Museum in Gdansk,
- construction of Shakespeare Theatre in Gdansk.³³

³² Materiały Biura Gdańsk Stolicą Kultury 2016 <http://www.gdansk2016.eu/>

³³ Atlas metropolii gdańskiej, Urząd Miejski w Gdańsku, Gdańsk 2009

SWOT analysis of creative industries

Introduction and methodology

The purpose of this SWOT analysis was to determine the most important internal and external factors for the future development of the creative industries sector in the Gdansk Metropolitan Area. SWOT analytical technique involves segregation of available information on the sector in one of four groups (four categories of strategic factors):

- **S** (Strengths) - everything that is an asset, an advantage of the analyzed sector,
- **W** (Weaknesses) - everything that is a weakness, the barrier in the analyzed sector,
- **O** (Opportunities) - all that creates an opportunity for the sector, favorable changes,
- **T** (Threats) - anything that poses a danger for the sector, adverse changes.

Information that couldn't be properly classified in any of these groups is ignored as irrelevant strategically for further analysis.

The basis for the creation of a SWOT analysis were the results of quantitative and qualitative research conducted in the first part of the project, including research on the national and regional context for the creative sectors, conditions and development trends, a statistical portrait of the sector as well as expert opinions of individuals active in the industry. In addition a meeting was organized with representatives of entities interested in cooperation within the industry.

Conducting a thorough SWOT analysis helped to identify problem areas within which there is a need of creating solutions. The SWOT analysis can be therefore seen in this case not only as an analytical tool but in part also as a planning tool that can help identify the potential of developing Creative Cluster in Gdansk Metropolitan Area. According to the preliminary assumptions the SWOT analysis is supplemented by a description of the sector, which represent the greatest strength and has the biggest potential of growth, development and international competitiveness.

The presented SWOT analysis is based on selecting the most important features in the various strategic areas such as:

- potential of the metropolis and the region,
- competitiveness and innovation,
- human resources,
- awareness of the benefits and willingness to cooperate.

Selected factors were then analyzed and ranked. This analysis was based on an assessment of importance of individual factors and the determination of whether in the creative sector outweigh strengths or weaknesses and whether in the environment are more opportunities or threats. This allows to choose the right strategy (aggressive, competitive, conservative or defensive).

SWOT analysis of creative sector in the Gdansk Metropolitan Area

Tables on the next pages show the results of assessing and ranking the factors.

In parentheses there are weights attached to individual opportunities, threats, strong and weak sides, determining their impact on development of creative industries:

- 1 - low impact,
- 2 - medium impact,
- 3 - major impact.

Strengths	Weaknesses
Potential of the metropolis and the region	
<ul style="list-style-type: none"> • CI have a significant and still increasing share in the economy of cities and the region (3) • good institution base in the field of culture (2) • strong historical, cultural and civil society traditions in the region (2) • high quality of life (the highest in Poland) (3) • large desire and determination of companies to locate in the metropolis (2) • attractive location for industrial investment in some sectors (eg ICT) (2) 	<ul style="list-style-type: none"> • peripheral geographical location and poor accessibility (2) • limited capacity of the local market compared to other metropolitan areas (3) • the image of metropolis as having average creative potential compared to other regions (2) • low utilization of institutional and infrastructure base in the field of culture (2) • high prices of office, retail and workshop space (3) • lack of coherent regional policy for the development of creative industries (2)

Creative industries contribute significantly to the economic structure of the metropolitan area and the entire region. Within 5 years, the sector recorded more than 17 percent increase in the number of firms, despite the crisis at the beginning of the decade. The greatest dynamics of growth showed the following sectors: software (an increase of almost 50 percent. within 5 years), advertising and production of jewelry.

The number of cultural institutions and creative companies puts the metropolis alongside other cities such as Poznan and Wroclaw. However, the role and image of the metropolis in the whole country is low in relation to the Warsaw and Cracow according to the respondents. In the region there are many developing informal or semi-formal creative and cultural initiatives, some of which have potential for commercial development and seek for business model for market entry.

The location of companies in the metropolis is mostly determined by factors such as high quality of life (highest in Poland!), environment and multidimensional nature of the

metropolis fulfilling different functions. Creative community also had a major impact on influencing the respondents' evaluation of the location of their business. Developmental nature of the creative community, combined with the characteristics of highly urbanized cities, were considered as factors that “give energy”.

Those companies that have a negative view of the Gdansk Metropolitan Area as a location for creative industries, besides the periferial location, often lacked the cultural stimulation, including the medium quality of the public realm. Critical comments on the public sphere covered both the perception of inefficient use of cultural infrastructure, lack of access to space for creative activity, high rents in the city's municipal premises. The inconsistency of actions between different actors and authorities (and even within the same administrative unit) was pointed out as well as lack of planning which would take into account both public and private sectors.

Another negative factor for localization indicated by the respondents were lower business opportunities related to the low number of major potential customers located in the region. Some described the nature of the local market as to little absorbent which affects the opportunities to present creative designs of firms in the region.

Strengths	Weaknesses
Competitiveness and innovation	
<ul style="list-style-type: none"> • high quality services on a national and sometimes international level (3) • majority of dynamic and flexible micro-enterprises in most sectors (2) • relatively strong competition in the industry (2) • specialization possible because of the depth of the market - a place for larger, complex projects based on the effects of scale and small companies specializing in niches (2) • high research potential in the region (relating to average in Poland) (2) • companies to successfully implementing new technologies and ways of organizing production (2) • a strong positive impact on the development of other dynamic industries (3) • a significant number of innovative ideas for creative projects (2) 	<ul style="list-style-type: none"> • lack of critical mass of companies in few subsectors (eg, media) (3) • heterogeneity of the industry - many subsectors with its own specificity (3) • small number of recognizable brands on the international level (3) • untapped potential for collaboration with other sectors such as tourism and within areas important on the European Union level such as aging society (3) • strong dependence on economic fluctuations (2) • small utilization of location potential for example in terms of expansion into neighboring markets (2) • lack of a developed system for financing innovative ventures (2) • insufficient promotion of the industry (3) • Insufficient cooperation with research and development centres in the region (2) • little knowledge and practical experience

<ul style="list-style-type: none"> • cross -regional market operations and effective competition with companies from all around the country (2) • willingness to develop and expand on international level (3) 	<p>in the management of intellectual property rights (2)</p>
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Qualitative research of creative industry showed that most companies started operations in the last decade and in some sectors, such as software, companies operate successfully less than 5 years. Most of companies in such a short time had not have enough time to develop capacity in terms of size - so most of them are by micro and small businesses.

Many companies, especially those from subsectors based technology began as start-ups - new companies motivated by new technological capabilities or the idea for the implementation of new business solutions, in particular based on ICT. These companies, even with very short experience, operate in highly competitive stimulating environment and carry out complex technological projects with international partners.

The potential of higher education has been assessed very positively, thanks to high level of substantive research and continuous efforts in providing resources of talented employees - particularly in the ICT industry.

Companies from the creative industries cooperate with partners from across Poland, often subcontract tasks and strive to build effective relationships with other entities. Due to the small size of the business and the lack of recognizable brands often use intermediaries in reaching the final recipient (such as large media houses in the case of the graphic subsector) and to be able to enter the market. This creates, however, significant limitations both in terms of margins and the impact on the shaping of the product and company's market strategy.

There is a strong under representation of some of the creative sectors in the region, such as journalism and publishing, museums and other cultural activities and film industry. Print media and music are mostly domain of large international capital groups, most of which is established / has a branch in Warsaw. A similar situation occurs in the film business, mainly due to the lack of tradition, a small number of companies and employees. Among the producing companies only few deals with creative production of films for corporations and institutions - most offer videofilming services for individuals.

Creative industry companies, although they are often prominent in their fields of expertise, do not feel well prepared for the sudden growth, although that prospect seems to them a natural consequence of the development of their business. On the other hand experience of some innovative companies indicate, that when there is a properly chosen strategy and organizational support creative businesses can significantly expand the market of operations and change roles from subcontractor to a significant player in its field. Many companies are considering taking the effort to enter new markets but there is problem is a shortage of certain competences: the management of large projects, business skills, marketing, legal and organizational issues.

The specificity of creative industries is different for each subsector, but in all branches taken into account there is an emphasis put on the need for cooperation within the tasks and the division of competences. Strong specialization is a trait that can be an obstacle but it is also an opportunity for niche creative businesses.

Few of the surveyed companies invested significantly in promoting their products and services, duplicating a pattern: the smaller companies recognized that effective marketing is too expensive, while the larger (or those of greater importance) claimed that they never had to advertise because of the recommendations of their services by satisfied customers to others.

One of the biggest barriers to growth indicated by the study is the access to finance. Companies face particular problems associated with finding investors - the lack of information and understanding of the sources of financing, difficulties in developing and presenting a convincing business plan or reliance on business models that are unadjusted to the reality of the market. Furthermore, companies often base their advantage on prototypes or design, they are to a large extent depend on a flagship product or service and largely depend on individual talent. Many creative firms do not have sufficient knowledge about the sources of funding and access to them.

Negative opinions were related also to the unused location potential in the Baltic Sea Region to create connections, i.e. in projects stimulating the development of creative industries. There is also an untapped potential for collaboration with other sectors such as tourism and within hot topic issues important in the European Union such as society aging.

Strengths	Weaknesses
Human resources	
<ul style="list-style-type: none"> • available skilled workers, specialists and enthusiasts (3) • academic institutions with significant education potential (3) • high levels of entrepreneurship and initiative (3) 	<ul style="list-style-type: none"> • training offer unsuited to current needs (2) • lack of competence in the effective management of innovative projects (3) • low rate of retention of highly qualified graduates in the region (2)

Companies in the creative sector do not feel the absence of workers on the market, especially those whose profession is a personal passion. Many companies have problems finding people who would bear the competences concurrently in several important from the business point of view ranges: for example, specialization in the creative field and organizational or marketing skills, knowledge of customer relation etc. The training of students in specialized areas such as architecture or ICT is at the European level. There is, however, lack of specialized training and postgraduate education in the creative niche areas, such as computer games design.

The curriculum of studies devotes little attention to traineeship or practices in the industry. There is a lack of systemic support for the development of contacts and inter-university cooperation, especially art schools with technical and economic universities- this type of cooperation is an exception rather than the rule. The specific area of education are sectors in which there are craft activities predominant. An example might be jewelry and amber industry. Jewelry is taught in Poland at the high schools and university level in just a few schools of art profile.

Although the training programs often lack the elements of business education graduates have a high initiative and desire for setting up companies – region is from many years at the forefront in the number of new companies entering the market. Some of the companies is the result of transferring a favorite hobby to a business - the passion associated with the implementation of interests was transformed into the driving force behind new business. In particular, it is an advantage in terms of: knowledge of the market and its needs, the importance of key success factors in the industry, knowledge of people and environment as well as the latest trends and unmanaged business niches.

Strengths	Weaknesses
Awareness of the benefits and willingness to cooperate	
<ul style="list-style-type: none"> • awareness of the untapped potential for cooperation (2) • openness to collaborate within the industry and with other sectors (3) • public interest in the development of culture in the region - Gdansk candidacy for the European Capital of Culture 2016 (3) 	<ul style="list-style-type: none"> • lack of knowledge about other companies and their competences, small experience with cooperation in the region (3) • public administration not fully aware of the potential and opportunities for the region associated with the development of creative industries (2) • little knowledge on clusters and benefits from participation (2)

Companies which participated in the study have weak connections with local businesses and mostly base on the partners from other parts of the country. This is due to: continuation of past relationships with existing partners, gaps in the chain of production in metropolis (not all types of entities exist in this market), but primarily to incomplete information on the potential and opportunities of local businesses - potential partners. Informal channels of information are insufficient to provide full market offer. There is also no information sharing platform or an institution serving as an integrator or a contact point in area of potential development opportunities. The knowledge of clusters and the benefits for companies related with cluster activities is weak. Companies are however aware of the untapped potential of cooperation and open to collaborate within the industry and with other sectors.

The experiences of companies in cooperation with institutions and regarding public support are very different. The level and type of support depended largely on the type of entity, its objectives and the sector of activity. Despite the fact that individual actions have been

supported under the theme of "culture" (artistic workshops) or "business" (grant financing going to trade fairs abroad), there were no action toward supporting initiatives operating at the interface between these two spheres.

Cities are beginning to recognize the cultural and innovative role of the creative sector. There is a slowly growing interest in its promotion in order to expand the investment attractiveness of the region. As an example could be brought initiatives such as Gdansk candidacy for the European Capital of Culture 2016 or Gdyna Design Days. This last event became the flagship project of design dissemination in the Strategy for the Baltic Sea Region Action Plan adopted by the European Commission in June 2009. There is a risk that if the development of creative industries sector will not be placed in the development strategy of the city or region, then the activities remain only promotional events with a local or regional range.

Opportunities and threats

Opportunities	Threats
Potential of the metropolis and the region	
<ul style="list-style-type: none"> • return of prosperity - a growing demand for creative industries (3) • good prospects for development of the industry as an future-oriented area (3) exploitation of the economic potential of the region - cooperation with other sectors (3) • creating a coherent regional policy for the creative industries sector, highlighting its importance in other strategic documents, integration into other sector policies such as land use planning (3) • ensuring the space for the creative industries activity through the revitalization of neighborhoods and areas (3) 	<ul style="list-style-type: none"> • duration of the global economic crisis (2) • lowering position in the national arena - strong competition from other locations (3) • skipping the creative sector in the strategic directions of development of the region because of the dominance of other industries (2) • lack of linkages and activities with regard to infrastructure and cultural institutions and the sector activities (3)

Opportunities for the creative industries in the Gdansk Metropolitan Area are to some extent associated with the development of the economy and the growing demand for services related to creativity. This is a result of factors such as globalization of markets, the digitization of products and services, changes in leisure and others. Unfortunately, the specificity of the industry makes it very susceptible to fluctuations and, global crisis, if prolonged, will significantly hamper the development of creative industries.

Industry has good prospects for growth, in particular the ICT sector, which has an impact on almost all fields of social and economic life. Seizing this opportunity requires, however, finding its own specialization and forging the strengths to practical effects of implementing new products and services, especially in the face of very strong competition from other metropolitan cities. Other locations in Poland, in particular Lodz and Wroclaw, for several years now take action regarding the development of creative industries.

Innovation reports and strategic documents of the European Union indicate that a cross-sector cooperation is a very good basis for innovation. The most of new ideas are formed at the interface between the traditionally regarded sectors. Gdansk Metropolitan Area has a strong economy and many developed industrial and service sectors. Working with sectors such as tourism, logistics, transport and ecoenergetics (particularly in the context of ICT) may become a growth impulse for creative industry and a chance for new projects in innovative cross-sectoral areas. These industries have great potential and are considered strategic for the development of the region, which can be perceived as a threat of marginalization of the creative sector in relation to these industries as a less substantial in terms of economic indicators. On the other hand, the situation provides an opportunity to develop cooperation with the industries with high economic leverage, which may become important customers, stimulating the development of the creative sector in the creation and implementation of new products and services.

According to industry experts opportunities for the creative sector at the strategic level is "to give a direction" for actions in scope of investment and development planning. The main element of these activities could be: creating a coherent regional policy for the creative sector, highlighting its importance in other strategic documents as well as including aspects relating to creative potential in other sectoral policies such as spatial planning. One possible direction is to provide a space for activities of creative industries through the revitalization of less developed neighborhoods and areas of the Metropolis.

Creative industries regional policy should include creating a platform for dialogue between private and public sector, in particular, creative businesses and cultural institutions. Creative companies participating in this study are very open to collaboration with public institutions and research and development units as well as willing to engage in activities related to the development of the future strategic direction of the sector in the region.

Opportunities	Threats
Competitiveness and innovation	
<ul style="list-style-type: none"> • creating a cohesive regional brand as the location of creative industry (3) • promoting the outstanding creative businesses in the region at a national and international level (3) 	<ul style="list-style-type: none"> • shortage of development projects - the widening gap limiting innovation and technological absorption capacity of modern solutions (2) • difficult access to external financing (3)

<ul style="list-style-type: none"> • enhancing awareness of the importance of professional services in a creative business development (design, advertising, PR, etc.) (3) • efficient use of EU funds (both domestic and international) –i.e. through international creative projects, building cultural facilities (3) • ability to cooperate with creative industry in other regions (in the country and abroad), particularly in the Baltic Sea region and Central Europe (3) • strengthening the competence creative businesses in sales and export (3) • increased cooperation with R & D sector (2) • increase in research potential of the major universities in the creative industries sector (2) • improve the competence in the protection and exploitation of intellectual property rights (2) • improving access to investment capital - the creation of investment support schemes (3) • creation of specialized development infrastructure such as a laboratory for joint creative projects (3) 	<ul style="list-style-type: none"> • weaknesses in the use of intellectual property rights protection resulting in financial losses, and blocking development (2) • the inability of local firms to face international competition (3) • lack of visibility and ability to promote projects and the region as a location for the creative sector (3)
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The volume of required resources and the uncertainty of outcomes often discourage local creative companies to take action in new markets, especially international. This situation may be addressed by increasing the international visibility of the companies and the entire creative industry from the region by creating a strong brand, effective promotion activities and assistance in integrating into international networks, projects and value chains.

Promotion and communication activities require considerable funding. For this reason, it would be reasonable to develop and implement a common marketing strategy for the industry. It is a set of actions aimed at building a positive image and promote sales of products offered to the market within the industry. The strategy may also include participation in promotional events in various locations in Europe, participation in trade fairs, conferences, etc. An important factor in increasing the impact of promotion will be creating a logo and slogan of the region as a location for creative businesses. One element of the strategy can also be the creation and promotion of branded products and services, which are uniquely identified with the region.

Customers seeking creative services in the region should have better access to information and awareness of the extremely competent creative companies in the region, so that commissioning projects to those companies will become a standard. The optimal solution would be to centralize the information system in the form of a uniformly developed and updated database of information compiled from various sources, mainly data from businesses, institutions, industry, local governments, etc. One of the key elements of an efficient information system is a comprehensive online service through which you can connect to the selected subject. To ensure maximum functionality of this site, it must be constantly updated.

Another step in overcoming barriers of development of creative businesses are activities towards formation of specialized financial services market. Currently, financial institutions do not support companies operating in high-risk sectors or seeking a relatively small financial outlay. Funding mechanisms should be "tailored" and meet the specific needs of companies i.e. in form of facilitating the contact with managers of venture capital funds. Opportunities for financing projects include support for the development of "investment readiness" in companies by developing the skills of providing investors (but also banks) with a feasible development strategy and a business model to achieve a high return on investment.

Particularly important in new industries, characterized by high levels of innovation, is to support companies based on passion of the founders or scientific output. To promote a business culture in the creative sector measures are needed to support young people running companies i.e. through organizing training courses on entrepreneurship, intellectual property rights and through ongoing advice. It is also important to create a favorable general climate for the development of creative businesses.

The increase of knowledge transfer on a global scale and internationalization of regional creative potential can be achieved by the participation of the Pomeranian institutions and enterprises in international projects aiming at the creative sector. This kind of cooperation enables the evaluation of own achievements in relation to the level seen in the world (benchmarking). There are broad opportunities for participating in international networks and receiving financial support for such activities posed by European programmes such as 7th Framework Programme and the macro-regional programmes (the Baltic Sea Region and the Central Europe Programmes).

Companies should also be able to obtain information on conditions and the potential of foreign markets and information on the institutions supporting the operation in international markets. Support for companies will also involve facilitating access to consultancy services in terms of benefits, risks, specialization and niches in foreign markets as well as implementing quality systems and standards.

Opportunity for the sector is the change in the way R & D institutions operate in the direction of greater interaction with the business. In this context it is worth considering to create a model of cooperation with research centers, which should govern the nature of collaboration, the use of laboratory equipment and staff time, and the sharing of profits from joint ventures. Increasing the potential of creative industries involve the creation of specialized

infrastructure. Construction of new laboratories (eg for the processing of data necessary for the development of graphics applications and animations) for the needs of companies and institutions must be preceded by an extensive needs analysis. The necessary infrastructure measures and their specific applications are the responsibility of interested stakeholders.

Opportunities	Threats
Human resources	
<ul style="list-style-type: none"> • modification of the education system in the region - bringing the supply of university/ school to prospective demand (2) • creating offers of training opportunities for the industry (3) • improving organizational, project and marketing skills in companies (3) • support new business development and creative networking to retain the talented students and graduates in the region (3) 	<ul style="list-style-type: none"> • decrease in the number of graduates due to demographic processes and the low retention rate of graduates in the region (2) • educational programs not consistent with the needs of industry resulting in a shortage of educated workers and hampering the development of companies (2) • companies reluctant to go beyond their existing markets and current scale of operations (3)

Many small, often niche creative projects taking place in the Gdansk Metropolitan Area is one of the elements proving the potential for development of creative industries in this location. They provide energy and inspiration which is a strong base of social potential and creativity - a kind of "research and development" for the business area and can play a key role in attracting creative businesses to metropolis. Many of them have the potential to provide direct economic value but are currently lacking certain competencies such as marketing skills or business practice.

The chance to realize the full potential of the sector is also connected with the direct support for the development of organizational, project management and marketing skills in companies. This can be performed in the form of the dedicated training offer, support for the professionalization of services or the development of tools for project management with special reference to the creative industries.

Decrease in the number of graduates due to demographic processes as well as migrations to other locations may result in hampering the development of creative industries in the metropolis. It seem necessary to take actions to commit those yet at high school or study in cultural and creative projects resulting in the development of skills and creativity among young people, lower rate of migration from the region, attracting talent from outside of Pomerania and the creation of a creative environment which is a base for development new businesses.

One of the elements conducive to the development of the human resource base is to adapt the study curriculum to the needs of creative industry. Despite the high level of education in creative industries, such as architecture and ICT, the region lack training opportunities in more specialized areas. When creating a new curriculum it is necessary to carry out a detailed survey in the direction of current and projected business needs for specialized skills. Such an examination was made in 2010 in the ICT industry, and is currently the basis for the creation of the Educational Center of Excellence - a platform for training and education networking the potential of many training institutions and specialized needs of companies. Integrating multi-disciplinary issues of additional skills in the curriculum of the training programs - such as technology skills (project management, quality assurance and process engineering) and "soft" skills (language skills, presentation, teamwork, marketing) will have a positive impact on the growth of companies.

Opportunities	Threats
Awareness of the benefits and willingness to cooperate	
<ul style="list-style-type: none"> • breaking down the soft barriers of cooperation between different actors (trust) (3) • significant intensification of cooperation in the region (3) • openness of authorities to support the development of regional cluster initiatives (3) 	<ul style="list-style-type: none"> • passivity of actors in cooperation – business, education and public authorities (3) • underestimating the importance of creative industries by policy makers at various levels, (2)

One of the consequences of the small size of firms is considerable time pressure tied to the implementation of current projects, and new ideas and opportunities are not tapped fully. Most companies are one-person operations, some have one or a few employees.

Small businesses do not have sufficient capacity to undertake individual large, complex projects on their own and often are forced to the role of subcontractors. Supporting the development of sectoral cooperation platforms and increasing interaction and communication between business will help to raise the necessary experience and form a network of cooperating companies, that will have the skills to effectively manage large projects.

Companies working in the network of firm complementing their expertise but also those of a similar profile, could significantly increase their production capacity.

Cooperation between the various partners in the creative industries sector will enable the implementation of projects that would not be possible without creating a formal cooperation group. Acting together, companies can more effectively impact the environment such as the educational institutions, local or regional authorities - the strategies and directions of public spending, infrastructure investment, etc carried out by them. Identification of common

interest and creating a pressure group significantly increases the chances to achieve the desired change.

The critical challenge will be the effective use and integration of all these factors to actions to strengthen the creative industries sector in the Gdańsk Metropolitan Area. It is especially difficult in the context of small knowledge of public sector representatives on the potential and the development factors of creative industries in the metropolis. The above-mentioned proposals for action can be supported by the public sector, not only for co-development activities but also through the creation of a coherent public policy to promote the creative sector, promoting the region as a location for innovative businesses and establishing a dialogue with representatives of organized sector.

Results of the SWOT analysis ranking towards the preparation of development strategies

Elements of the SWOT analysis have been analyzed and ranked. Based on the ranking of the strengths, weaknesses, opportunities and threats, the market position and market attractiveness of creative sector was defined.

After a detailed analysis of factors an indication of the optimal strategy for the creative industries sector can be made – **the competitive strategy (mini-maxi)**. Creative industries have a balance of strengths and weaknesses, but it definitely is favored by the ambient conditions. The strategy should rely on the effective utilization of these opportunities while reducing or improving internal weaknesses. An example of a mini-maxi strategy may be the willingness of companies with less organizational potential to enter into cooperation with others in order to exploit the opportunities of opening new markets. Such a strategy involves the use of chances, filling market gaps, eliminate weaknesses (development of new products, seeking new markets, strengthening of competence).

Prospects for the development of creative industries in the Gdansk Metropolitan Area- a description of the industry with the greatest development potential

ICT industry – a key sector for economic development of Pomorskie region³⁴

Pomeranian ICT industry (Information and Communication Technologies) consists of several major sub-sectors: IT services (software), electronics and telecommunication products and services. These sectors are among the high technology industries requiring the highest skills from employed professionals.

Total employment in the ICT industry can be estimated at around 20,000 people working in more than 4,000 private entities. That gives the region a high 5th position in the country in regards to number of workers. Sector of broadly defined software services (the whole NACE 72 group) is represented by almost 6,000 people in 3,000 entities (data for 2007).

The value of production sold in the sector in 2008 amounted to approximately 6.4 billion PLN (about 1,6 billion euro), which accounted for 6 percent share in total sold production of all industries in the region. The structure of sales is dominated by the electronics sector (4.13 billion PLN), the IT services (PLN 1.36 billion) and telecommunications (0.88 billion PLN).

Exports of goods and services of the ICT sector amounted to 4.1 billion PLN (about 1 billion Euro). From this electronics accounted for 82 percent and IT by 17.7 percent. ICT industry is also responsible for about 17 percent share of value of exports of the whole region. The ICT entities are characterized by very high international competitiveness - the intensity of export share in total sales of companies is average of 60 percent and it is several times higher than the average for the region (about 16 percent.) and ICT industry average for Poland (about 13 percent).

ICT has a strong development potential, mainly through:

- presence of substantial concentration of the sector in the region in relation to the national average;
- large share of regional performance in basic economic indicators of ICT sector in Poland (i.e. 1/3 of country's electronic exports is performed in the Pomerania region),
- strong traditions of the industry in the region,
- investing attractiveness from the viewpoint of foreign investors further confirmed by the entry of new operators,
- strong research potential (as for the Polish conditions),
- large stream of graduates in electronics, telecommunications and information technology - a significant pool of highly skilled human capital,
- dense network of linkages of formal and informal character.

³⁴ Chapter prepared on the basis of expert surveys and materials from the Pomeranian ICT Cluster

Location quotients calculated for all the basic economic categories clearly indicate the presence of a strong concentration of the ICT industry in the region (in the group of entities with more than 9 employees) in relation to average in Poland.. In 2008, the concentration ratio of the production sold value was 1.80 and for export 8.79. In the literature it is assumed that when the coefficient is above 1.25 it indicates the existence of a significant concentration.

The international competitive potential is determined in part by the large business entities located in the region, including global players like: Intel, Thomson Reuters, IBM, Lufthansa Systems, Zensar Technologies, Kainos and Axiom. Significant role in the ICT sector is played by small and medium-size local companies with large, often global development potential (IVO Software, Cama-Soft, InteliWISE etc.).

Gdansk was identified by the KPMG report (Exploring Global Frontiers - The New Emerging Destinantions 2008), among the thirty most attractive locations for future IT-BPO centers (Business Process Outsourcing in the IT area) in the world. The attractiveness of Pomerania is determined by such factors as the availability of highly qualified professionals (the number of educated professionals per year), relatively low labor costs, good command of foreign languages, the attractiveness of living in the city.

Pomeranian ICT sector has a distinguishing science and research background located in the University of Technology (Faculty of Electronics, Telecommunications and Informatics). Crucial for the development of the industry are graduates from universities. Every year, nearly 1,800 graduates in ICT related fields are leaving the walls of universities in Pomerania.

The potential is complemented by several research institutes: Telecommunications Research Institute, Institute of Computer Science - Polish Academy of Sciences, Maritime Institute in Gdansk - Department of Marine Electronics and and Marine Technology Development Center. The significant potential of the cluster is indicated also by the localisation of the commercial research and development center of Intel's (global industry leader) and the new research and development center of IBM.

There is a rapidly growing cluster initiative operating in the industry - Pomeranian ICT Cluster. This initiative builds on long experience of Gdansk University of Technology of cooperation with entrepreneurs in the development and implementation of innovative solutions, i.e. in the frame of Wireless Technology Centre of Excellence (Wicomm). The initiative is a platform for cooperation between companies and institutions from different sectors: business, science and administration. There has been a development strategy created jointly with partners and there is an effective formal management structure operating. There are already more than 80 participants of the initiative (companies and support institutions) employing totally more than 13 thousand people in the industry.

In the frames of the initiative there are activities on innovative products, business co-operation, infrastructure, human resources, promotion, et al taken up. In 2009 the Pomeranian ICT cluster has been awarded by the region authorities a Key Cluster in the region. The competition has been organized by the Board of the Region. The initiative got the highest rates from the international committee of experts evaluating clusters participating in the

competition. Within the first years of operation a number of activities were organized implementing the aims defined in the strategy including: research and development projects, financing initiatives, international cooperation, education, cooperation with regional administrations and other sectors interested in ICT solutions.

There is an evident influence of the ICT industry on all industry sectors in regards to new innovative solutions. There are R & D and implementation projects carried out, which are the basis for creating the cutting-edge devices and applications that are used in almost all areas of socio-economic development, including the architecture, engineering, tourism, media, advertising, safety and education. The Pomeranian ICT sector and the companies engaged in cluster activities have a strong focus on innovative solutions. There are themes of particular competence like ambient spaces, 3D imaging, intelligent content recognition <http://fidointelligence.pl/1,home/EN>, speech synthesis in various [languages](http://www.ivona.com/?set_lang=en&) http://www.ivona.com/?set_lang=en& etc. that could be used in creative and cultural aspects for the benefit of all participating sectors.

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Annex

Classification of the creative sector in relation to the Polish Classification of Activities (PKD 2004) and NACE

Sector	PKD 2004 - NACE
Artists' and Performing Arts	92.3 Other entertainment activities, i.e.: <ul style="list-style-type: none"> • Artistic and literary creation and interpretation • Operation of arts facilities • Entertainment activities
Film Industry	92.1 Motion picture and video activities, i.e.: <ul style="list-style-type: none"> • Motion picture and video production • Motion picture and video distribution • Motion picture projection
Journalists and publishing	92.4 News agency activities 22.1 Publishing, i.e.: <ul style="list-style-type: none"> • Publishing of books • Publishing of newspapers • Publishing of journals and periodicals • Publishing of sound recordings • Other publishing
Library, archives, museums	92.5 Library, archives, museums and other cultural activities, i.e.: <ul style="list-style-type: none"> • Library and archives activities • Museums activities and preservation of historical sites and buildings • Botanical and zoological gardens and nature reserves activities
Other retail sale of cultural goods	52.4 Other retail sale of new goods in specialized stores, i.e.: <ul style="list-style-type: none"> • Retail sale of books, newspapers and stationery • Retail sale of works of art [contemporary]
Architecture	74.2 Architectural and engineering activities, i.e.: <ul style="list-style-type: none"> • Architectural activities • Engineering activities
Design	74.8 Miscellaneous business activities n.e.c. <ul style="list-style-type: none"> • Photographic activities • Fair, exhibition, trade show operations • Designing of apparel, footwear, jewelry, interiors, trademarks
Advertising	74.4 Advertising, i.e:

	<ul style="list-style-type: none"> • Advertisement design • Sale of advertisement time and space in media • Composition of store displays
Software Industry	72.2 Software consultancy and supply
Manufacturing jewelry	36.2 Manufacture of jewelry and related articles

Notes:

Radio and television activities NACE 92.2 despite the methodological assumptions was not included in the group of film industry in the study due to lack of data. There was a problem of statistical confidentiality - non-sharing of statistical data obtained in the process of research and statistical surveys, which may lead to the identification of entities.