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**Cultural and creative industries in Turkey
A benchmarking with Italy and Spain**

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Abstract

The Mediterranean region is receiving more attention in recent years. This was due because the heterogeneity of countries that compose it raises several difficulties in business collaborations, but it also unfolds several cross-national economic opportunities to develop among Mediterranean countries.

Within the Mediterranean region, the Turkish case represents a prime example of a border country, a crossroad between Europe and Asia, not yet sufficiently studied. The analysis of cultural and creative industries (CCIs) can be useful to show that this area has many similarities with European Countries making intercultural exchange and cross economic development possible.

In this work, clusters of CCIs in the Turkish territory are identified according to a methodology developed at European level, following most recent approach on creative industries. CCIs are geographically mapped through the instrument of GIS and analysed presenting a benchmarking with two other Mediterranean countries: Spain and Italy.

The creativity specialisation found in this region is similar and allowing us to begin to discuss the idea of a Mediterranean creativity, cultural and heritage driven that is different from technology related creative industries diffused in Northern Europe.

Results confirm that CCIs is an emergent sector also in this region and it ranks on the same level of other European countries, apart from Turkey where it accounts half the value, and is in high growth. Finally, CCIs confirms predominantly as an urban phenomenon concentrated in large metropolitan areas also in the Mediterranean region.

Keywords: cultural and creative industries, Mediterranean region, Turkey, Spain and Italy.

Track: D. Culture, Creativity and ICT.

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1. Introduction: focus on the Mediterranean Region

The Mediterranean region is receiving more and more attention in recent years. This was due because the heterogeneity of countries that compose it raises several difficulties in business collaborations (ILO, 2010), but it also unfolds several cross-national economic opportunities to develop among Mediterranean countries (UNECE, 2010).

Recent contributions deal with tourism development in Mediterranean area looking for cross-countries synergies (Lanquar, 2012); others underline the role of manufactured exports and FDI in southern Mediterranean countries (Sekkat, 2013). Although most of them underline the importance of cross national relationships among the Mediterranean area for economic development and growth.

The Mediterranean region is important because it is a border area between Europe, and the African and Asian countries, a cross-roads of many civilizations, cultures and religions, an area full of history and with an important endowment of cultural heritage. Within the Mediterranean region, the Turkish case represents a prime example of a border country, a crossroad between Europe and Asia. The analysis of the creative industries can be useful to show that in this area there are many similarities with European Countries and that intercultural exchange is possible.

Also Europe Union commits itself to develop international relationships in Mediterranean countries. Two examples are the EUROMED and ENPI projects, the first related also to Cultural Heritage. EU Euromed Project represents a further milestone in the process of recognizing 'culture' as a catalyst for mutual understanding between the people of the Mediterranean region¹. It has committed a total of 57 million euros to fund partnerships between conservation experts and heritage institutions from the countries of the Mediterranean region with a network of more than 400 partners. The multilateral cross-border cooperation "Mediterranean Sea Basin Programme" is part of the new European Neighbourhood Policy (ENP) and of its financing instrument (European Neighbourhood and Partnership Instrument - ENPI). It aims at reinforcing cooperation between the European Union (EU) and partner countries regions placed along the shores of the Mediterranean Sea².

When history and innovation are considered as means of accelerating/understanding the economic growth, the cultural and creative industries could have a significant influence in stimulating the economic development (Stam et al., 2008). Furthermore, the spillover effect of this economic development serves the cause of improving global welfare. In this context, Turkey is a strategic point of intersection with the east and a melting pot of different cultures with an important cultural and artistic heritage. Because of its position as a bridge between civilizations, international markets, industries and technologies, Turkey has been playing an increasingly important role in achieving high economic performance not only in Middle East, but also in Europe and in the rest of Asia.

The study aims to focus on a larger area represented by the Mediterranean region and some of the most important countries such as Italy, Spain and Turkey. This is due because the specialisation found in this area is similar to other Mediterranean countries, a Mediterranean creativity more related to cultural industries and far from the northern part of Europe and from more technology related activities.

¹ Since 1998 the Euromed Heritage regional program has committed a total of 57 million euros to fund partnerships between conservation experts and heritage institutions from the countries of the Mediterranean region. Almost 400 partners from the Member States of the European Union and MEDA countries (Algeria, Palestinian Authority, Cyprus, Egypt, Israel, Jordan, Lebanon, Malta, Morocco, Syria, Tunisia and Turkey) have benefited from the Programme during its past phases. www.euromedheritage.net.

² 14 participating countries are eligible under the Program: Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Malta, Palestinian Authority, Portugal, Spain, Syria and Tunisia.

The paper is divided in six sections. Next section deals with cultural and creative industries definition with a specific focus on Turkey. Section 3 presents the research design, data sources and the mapping methodology. Section 4 focuses on the analysis on Turkey with a specific focus on Ankara and İstanbul metropolis. Section 5 presents the benchmarking with Italy and Spain. The paper ends with some conclusive remarks highlighting similarities and differences of CCIs in the three countries.

2. Creative and cultural industries in Turkey: state of art

CCIs are a recent phenomenon, as they firstly emerged in Australia in 1994, with the launching of the report *Creative Nation* (DCA, 1994). It gained wider exposure in 1997, when policymakers at the United Kingdom's Department of Culture, Media and Sport (DCMS) set up the Creative Industries Task Force. The first attempt to define creative industries has been made by the British Department at the end of the 1990s (DCMS, 2001). At several years of distance and despite the growth in contributions, a clear and shared definition of the sectors is still lacking (Markusen et al., 2008; Flew and Cunningham, 2010).

In the DCMS model, creative industries involved cultural sectors together with creative sectors, such as technology and multimedia. The sectors taken into account were essentially those based on creativity, talent, personal abilities, with a possible potential for the rising of employment and wealth (DCMS, 2001). Due to both the institutional value and the inspirational contribution, the creative industries have firstly been defined by the DCMS including 13 sectors: advertising, architecture, art and ancient art markets, craft, film, video, software, music, performing arts, theatres, publishing, TV and radio.

This taxonomy has been utilized in several researches and been accepted as the principal one at European level (Lazzeretti et al. 2008; Chapain et al., 2010, etc.). However, the creative industries approach has recently undergone relevant adaptations, shifting from approaches exclusively based on specific activities (De Propris, 2013), towards contributions that significantly enlarge the 'creative sectors' to other related activities (WIPO, 2003; KEA, 2006). The attention has been drawn also to design and handcraft, enhancing a broader pattern of creativity that spans outside the metropolitan centres (Bertacchini and Borrione, 2013).

This work wants to investigate the case of Turkey using an approach similar to this applied at European level.

Regarding the state of art of CCIs in Turkey, available information are fragmented and a benchmarking with other European countries, or Mediterranean countries, has not yet been developed. Moreover, at the moment a systematic and complete study of the creative sector does not exist, but consists of only some industry specific analysis. We remind in addition that not all cultural and creative activities are collected by Official Statistics, but as in developing countries, some activities come within an inform economy (Barrowclough and Kozul-Wright, 2008).

Similar to most emerging economies, to date, there are only two large scale studies about Turkish CCIs which enable comparison between different years. However, both of them were computed with city-level data. These research reports are about İstanbul (Aksoy and Enlil, 2011) and Ankara (Güran and Seçilmiş, 2013) Cultural Inventories. Both studies used a hybrid definition and classification of CCIs mainly based on the approaches of DCMS and UNCTAD (2008, 2010).

Though researchers have found that both cities demonstrate a great potential in creative industries, the current situation in terms of the overall CCI market is characterized by the fact that activities are not well-established and coordinated. Best to our knowledge, in Turkey, there has not been any comprehensive research reported at a national/regional level due to the lack of data. But, both İstanbul and Ankara reports roughly estimated the share of cultural sectors in total turnover for the year 2009 (1.6 billion TL): 3.1 and 1.6 percent, respectively.

However, despite the absence of nation-specific findings, there have been a number of research studies which focus on the city and sectoral/industrial level. In this sense, the film industry seems to

be the most popular /outstanding one of Turkey. For example, İncekara et al. (2013) found that the market share of Turkish movies in film industry has a high potential for development and they estimated the total product size of TV movies production in Turkey is around 409 million euros for 2008. In a similar way, Durmaz et al. (2008) investigated Antalya as an emerging film industry-oriented creative city. In addition, Durmaz et al. (2010) also investigated the role of creative industries in general and the film industry in particular. To this aim, they presented findings from two case studies that address the comparison between Beyoğlu, İstanbul, and Soho, London ³. Besides the film industry, festivalization is a prominent feature of cultural development as well. Doğan (2011) examined the cultural ambience of Istanbul in the context of festivalization and indicated the leading role of Istanbul Foundation for Culture and Arts (İKSVA) in this process.

Especially, after İstanbul was selected as the Capital City of Culture for 2010, the number of the works focused on creativity has started to increase rapidly in Turkey (Salman, 2010). In their study, Çetindamar and Günşel (2012) offered an index to measure the creativity of a city. As a result of their analysis, they found that İstanbul creates an innovation-friendly climate; however there is a severe lack of research/development infrastructure and technical support. In addition to the one mentioned above, creative textile design has emerged as a promising economic activity for Turkish economy (especially the textile and fashion cluster in İstanbul) as well (Gülcan and Akgüngör, 2008). The new economic sectors, in Turkey, which are creativity-based include not only the design activities but also the game/software industry. However, Binark and Bayraktutan (2012) emphasized that the volume of the shadow economy and the insufficient legal basis are the main obstacles for the development of this creative industry. In this context, the related works of Uçkan (2010, 2011) evaluated the knowledge communities and creative cities in Turkey and indicated that Ankara had been performing better than İstanbul in terms of science and technology.

The aim of this contribution is therefore to analyse this country in comparison with other European Mediterranean countries, to contribute to the international debate on the definition of creative industries, and outline the main characteristics of the sector, underlining if it is primarily related to a north European technology based creativity or to a south Europe cultural based Mediterranean creativity.

In this context, a good compromise is the recent work on the definition of Creative industries of DCMS that update its vision, largely recognised at European level from 2001. The 2013 revision (DCMS, 2013), focuses on the idea of “creative intensity” using the proportion of people doing creative jobs within each industry to suggest which industries should be included (Appendix 1). The broad industry groups/sectors that are considered by DCMS as creative are the following: Advertising and marketing, Architecture, Design and designer fashion, Film, TV, video and radio, IT, software and computer services, Publishing, and Music, performing and visual arts. In this contribution we consider it as reference in order to evaluate CCIs industry in Turkey as well and have a benchmarking reference for international comparisons.

³ See Alvarez and Yarcın (2010) for a study that examines the impact of the recent growth of cultural activities in İstanbul as a world city.

3. Research design, data sources and methodology

The data used in this work are obtained from Republic of Turkey Social Security Institution (RTSSI) Statistics/Statistical Yearbooks, Turkish Statistical Institute (TSI) Annual Industry and Service Statistics, TSI Cultural Statistics, and Turkish Revenue Administration (TRA). The main source of our analysis is RTSSI, because it demonstrates the distribution of the employees and work places by the activity groups and provinces.

The data collection is a difficult and very time-consuming process; hence, a number of data sets are used in this paper. Despite this, the authors had to use some values derived from approximations, due to the lack of data⁴. A number of NACE codes do not exist at the four digit level for some years in Turkey. So, for some activities, there is a need to employ proxy data produced by using the ratios and averages of the reference year (the last year for which the needed data is available)⁵. However, this does not become a limitation of our study, because CCIs have not been experiencing a rapid change process in Turkey.

Data on creative industries in Italy come from the 2011 ISTAT Census of Industry and Trade. Data on creative industries in 2008 on Spain have been collected from the 2010 Satellite accounts on the Culture Ministry of Spain (Ministry of Culture, 2010), while Data on CCIs in 2001 have been collected from the INE Census of Industry and Trade, 2001.

As is known, there is no common methodology (or a common terminology) to classify the activities that satisfy the criteria for the definition of creative industries. Here, we prefer the DCMS (2001) approach because - in the absence of a standard - it is the most prominent and generally accepted proposal as a point of departure employed by many scholars (Lazzeretti, 2013; Trippl and Todling 2013, etc.).

The 2013 revision used in this study is the latest update of the DCMS classification (DCMS, 2013), which focuses on the idea of “creative intensity”⁶ to suggest which industries should be included (Appendix 1). The broad industry groups/sectors that are considered by DCMS as creative are the followings: Advertising and marketing, Architecture, Design and designer fashion, Film, TV, video and radio, IT, software and computer services, Publishing, and Music, performing and visual arts. Departing from the contribution of DCMS, we offer the following Table 1 which shows the NACE Rev.2 codes used to describe the creative industries.

In order to identify and map creative clusters, we single out those places that have a high concentration of employees/firms in creative industries. Following the international approach of mapping creative industries (Nesta, 2010, Boix et al, 2013; Power, 2011), we construct a location quotient to the territory of Turkey. In this same research field, Drejer and Vinding (2005) apply location quotients to the knowledge-intensive services, Pratt (1997) and Bassett et al. (2002) to the cultural sector in the UK, García et al. (2003) to the Spanish cultural sector and more recently De Propriis (2013) map creative industries in UK and Trippl and Todling (2013) in Austria.

Regarding the territorial unit of analysis, usually it is preferred to apply location quotients to local labour systems (travel-to-work areas) in order to consider a territorial unit of analysis that considers the social and industrial geographical distribution of industries (Smart, 1974). Unfortunately in Turkey, the dataset on local labour systems does not exist and data on creative industries are not available at municipality level. Therefore we decided to use provincial administrative borders. This will allow us to focus more on metropolitan centres and large cities, as creative industries are commonly clustered in large urban centres.

⁴ Insufficiency of data is a common problem of most developing countries (Çetindamar and Günsel, 2012).

⁵ As data on CCIs at four digits level in 2011 are not still available, we have used 2009 four digits data to calculate approximations of four digits data in 2011. This is under the hypothesis that the distribution inside three digits is still the same in 2009 and 2011.

⁶ The proportion of people doing creative jobs within each industry

The location quotient is constructed in the classical structure in order to assess whether there is a higher concentration of CCs employees in the province in comparison with the national average:

$$\text{Index of Concentration} = LQ_{is} = \frac{E_{is}}{E_s} \bigg/ \frac{E_i}{E}$$

where E_{is} is the number of firms/employees in the territory s specialized in CC industries; E_s is the number of firms/employees in the territory s ; E_i is the number of firms/employees in the country specialized in CC industries; and E is the total amount of firms/employees in the country. A LQ above indicates that the territory is specialized in CC industries compared to the national average. The index is calculated for the number of employees.

Table 1. Creative Industries according to the DCMS, 2013

PUBLISHING	SOFTWARE AND PROGRAMMING
<p>58 Publishing of books, periodicals and other publishing activities</p> <p>58.11 Book publishing 58.12 Publishing of directories and mailing lists 58.13 Publishing of newspapers 58.14 Publishing of journals and periodicals 58.19 Other publishing activities</p> <p>58.2 Software publishing 58.21 Publishing of computer games 58.29 Other software publishing</p>	<p>62 Computer programming, consultancy and related activities</p> <p>62.0 Computer programming, consultancy and related activities 62.01 Computer programming activities 62.02 Computer consultancy activities</p>
	DESIGN AND DESIGNER FASHION
	74.10 Specialised design activities
	ARCHITECTURE
	71.11 Architectural activities
ADVERTISING AND MARKETING	PHOTOGRAPY
70.21 Public relations and communication activities 73.11 Advertising agencies 73.12 Media representation 73.2 Market research and public opinion polling	74.20 Photographic activities 74.30 Translation and interpretation activities
MOVIE AND VIDEO	ENTERTAINMENT AND ARTS
<p>59 Motion picture, video and television programme production, sound recording and music publishing activities</p> <p>59.11 Motion picture, video and television programme production activities 59.12 Motion picture, video and television programme post-production activities 59.13 Motion picture, video and television programme distribution activities 59.14 Motion picture projection activities</p>	<p>90.0 CREATIVE, ARTS AND ENTERTAINMENT ACTIVITIES</p> <p>90.01 Performing arts 90.02 Support activities to performing arts 90.03 Artistic creation 90.04 Operation of arts facilities</p>
	CULTURAL EDUCATION
	85.52 Cultural education
MUSIC	RADIO AND TV
<p>59.2 Sound recording & music publishing activities</p> <p>59.2 Sound recording and music publishing activities 59.20 Sound recording and music publishing activities</p>	<p>60 Programming and broadcasting activities</p> <p>60.1 Radio broadcasting 60.10 Radio broadcasting 60.2 Television programming and broadcasting activities 60.20 Television programming and broadcasting activities</p>

Source: our elaboration from DCMS, 2013.

4. Mapping cultural and creative industries in Turkey

4.1. Share and evolution of cultural and creative industries in Turkey

The number of the employees in Turkish creative industries is approximately 191,634 for 2011. The total increase in creative employment between 2008-2011 has been 38 per cent (140,000 in 2008); albeit the share of the creative industries generates only 2 per cent of the total employment of Turkey by 2011 (Tab. 2).

This record can be interpreted as a low share of labour employed in all industries nationwide when it is compared with the other countries in European region (the detailed information will be discussed in the following sections). ‘Manufacturing’ is the industry with the highest proportion of workers (28%), followed by ‘construction’ (15%), and ‘wholesale and trade’ (15%). Besides that other economic activities such as agriculture, financial intermediation, real estate, renting and business, and public services have low rankings as in the case of creative industries (around 1-2 per cent).

Table 2. The evolution of employment by industries, 2008-2011

Economic activities	Employees 2008	Employees 2011	% on total employment 2011	Growth in the period	% Growth in the period
Agriculture	92,004	124,112	1 %	32,108	35 %
Manufacturing	2,687,988	3,135,957	28 %	447,969	17 %
CCIs	139,176	191,634	2 %	52,458	38 %
Construction	1,238,888	1,630,851	15 %	391,963	32 %
Wholesale and trade	1,231,317	1,659,186	15 %	427,869	35 %
Hotel and restaurants	140,489	531,950	5 %	391,461	279 %
Transport and communication	591,162	935,197	8 %	344,035	58 %
Financial intermediation	127,435	141,588	1 %	14,153	11 %
Real estate, renting and business	1,149	16,669	1 %	15,520	1351 %
Public services	10,551	9,649	1 %	-902	-9 %
Other sector	2,682,006	2,845,780	26 %	163,774	6 %
Total	8,802,989	11,030,939	1.00	2,227,950	25 %

Note: Since the creative industries belong to different sectors, data on creative employees are also computed within the various economic activities. Source: Authors elaborations on RTSSI data.

First of all, it is possible to analyse the general evolution of creative industries in Turkey in the period of 2008-2011 (Tab. 3). The overall growth between these years has been remarkable with an increase in the number of employees which is on the order of 52 per cent in four years. The best growth performance is achieved by ‘software and programming’ (487%), which is followed by ‘publishing’ (465%) and ‘radio and tv’ (264%), while lowest performance is achieved by ‘advertising’ (-8%). In this context, it is hard to indicate that there is a well-balanced distribution of growth between different activities. However, it is possible to say that traditional industries (such as publishing, architecture and engineering, music, movie, video, performing arts, etc.) are more effective than non-traditional ones (such as ICT, advertising, etc.), in this growth trend (2008-2011) in terms of their contribution to newly created creative employment⁷.

⁷ The total contribution of traditional industries and non-traditional ones are around 32,000 and 20,500, respectively, for the period. However, it is useful to remind that these calculations are subject to change due to the definition of traditional CCIs used by the researchers. The approach preferred in this study is the same as used in Lazzaretto et al. (2008).

Table 3. Evolution of CCIs in Turkey, 2008-2011.

Economic activities	Employees 2008	Employees 2011	% on total CCIs employment 2011	Growth in the period	% Growth in the period
Publishing	2,701	15,258	8 %	12,557	465
Software and programming	4,901	28,793	15 %	23,892	487
Design	2,620	5,000	2.6 %	2,380	91
Movie and Video	9,293	14,052	7.3 %	4,759	51
Advertising	75,512	69,675	36.4 %	-5,837	-8
Entertainment and Arts (including Cultural Education)	15,092	15,798	8.2 %	706	5
Music	1,225	1,853	1 %	628	51
Radio and Tv	1,632	5,943	3.1 %	4,311	264
Photography	2,401	4,582	2.4 %	2,181	91
Architecture	23,799	30,680	16 %	6,881	29
Total	139,176	191,634	100 %	52,458	38

Source: Authors elaborations on RTSSI data.

4.2. Mapping cultural and creative industries in Turkey

An LQ above indicates that the area has a specialization (concentration) in creative industries which is above the national average. Map 1 presents specialised provinces in CCIs in Turkey. CCIs results are deeply concentrated in Turkey as there are only three provinces with a specialisation in creative industries, where the LQ reaches 1.71. The highest values are in Istanbul and Ankara, the main centres of the country⁸, respectively with a LQ of 1.71, 1.53. CCIs confirm to be clustered in main metropolitan centres. The concentrated industrialisation of Turkey seems to influence the development of creative and cultural industries in the territory as well.

The main two cities are Ankara and Istanbul. The total employment of these two provinces is over 122,945 units representing more than 64 per cent of the total employment in creative industries in Turkey (191,634 workers). As mentioned, CCIs are concentrated in these two main hotspots, 2,5 per cent of provinces are then creative (2 on 81).

Regarding the percentage of employees in creative systems, over a total employment of 11 million, creative industries in Istanbul and Ankara cover around 1.1 per cent of the total employment with a peak of 2,9 in Istanbul and 2,7 Ankara.

⁸Van has just a specialization in Design and Cultural Education; and therefore we will not investigate this city. Moreover, creative employees in this province account only for 1217 employees, therefore it is below the used threshold of 1 per cent of the nationwide creative employment.

Map 1: Cultural and Creative Industries in Turkey, 2011.



Source: Author's elaboration.

4.3. An analysis of two metropolitan centres: Istanbul and Ankara

As it is emphasized in the previous section, İstanbul and Ankara score a LQ of 1.71 and 1.53, respectively. Regarding different sectors, *Movie, Video and Music* (2,64), *Radio and Tv* (2.00), *Publishing* (1.98), *Advertising* (1.93), and *Entertainment and Arts* (1.71) generate over the overall LQ value of İstanbul (1.71) (Tab. 4).

Table 4: Evolution of CCIs in Ankara and Istanbul, 2008-2011.

CCIs	Employees 2011		Location Quotients		% Employees 2011		% on total CCIs employment 2011		% Growth in the period 2008-11	
	Ankara	Istanbul	Ankara	Istanbul	Ankara	Istanbul	Ankara	Istanbul	Ankara	Istanbul
Publishing	2,175	8,985	1.67	1.98	0.14	0.59	0.09	0.09	240 %	633 %
Software	4,159	13,596	1.70	1.58	0.14	0.47	0.17	0.14	462 %	630 %
Design	697	1,501	1.64	1.01	0.14	0.30	0.03	0.02	159 %	81 %
Movie and Video	1,040	11,055	0.87	2.64	0.07	0.79	0.04	0.11	40 %	54 %
Advertising	6,073	40,066	1.02	1.93	0.09	0.58	0.24	0.41	-45 %	4 %
Entert. and Arts***	2,652	6,528	1.79	1.71	0.17	0.41	0.11	0.07	20 %	-6 %
Music	137	1,457	-*	-*	0.07	0.79	0.01	0.01	40 %	54 %
Radio and Tv	756	3,539	1.49	2.00	0.13	0.60	0.03	0.04	613 %	237 %
Photography	639	1,376	-**	-**	0.14	0.30	0.03	0.01	159 %	81 %
Architecture	6,620	9,444	2.54	1.03	0.22	0.31	0.27	0.10	38 %	24 %
Total	24,948	97,547	1,53	1,71	0,13	0,51	1,00	1,00	19 %	46 %

Source: Authors' Calculation on RTSSI. *: Music has been computed with Movie and Video. **: Photography has been computed with Design in official statistics. *** Including Cultural Education.

In a similar way to that seen in İstanbul, *Entertainment and Arts* (1.79) and *Publishing* (1.67) are concentrated in Ankara, however, unlike İstanbul, Ankara is the most specialised city in *Architecture* (2.54) in Turkey. Besides, *Design* (1.64) and *Software and Programming* (1.70) are the other creative industries which have a LQ value greater than the overall city score for Ankara (1.53). To sum up, the traditional CCIs such as *Architecture and Engineering*, *Publishing*, *Radio and TV activities*, and *Arts* have been playing an increasingly important role in the development of creative economy both for Ankara and İstanbul. However, the non-traditional creative industries linked to ICT such as *Software and Programming*, *Graphic Design*, *Advertising*, etc. have relatively lower shares of creative economy's output.

Depending on these findings, it is possible to confirm that the *film industry* presents a great potential for Turkey, especially for İstanbul with a LQ of 2.64; as emphasized in the Section 2⁹. Besides that, it is difficult to make the same interpretation for İstanbul in terms of creative design activities. The LQ score of these activities is around the limit values (1.01). In addition, the calculations show us that Ankara performs better than İstanbul in new creative activities linked to ICT. This is in line with previous studies (Uçkan; 2010, 2011) suggesting the comparative advantage of Ankara in this field. In this context, it can be evaluated that the two metropolitan cities, not only İstanbul (as it is discussed by Çetindamar and Günsel (2012)¹⁰) but also Ankara, have a potential to present better opportunities for creative ideas.

In next paragraph, a general background of creative industries in Italy and Spain is presented, as elaborated from other contributions (Lazzeretti et al., 2008; Boix and Lazzeretti, 2011, Lazzeretti and Parrilli, 2012), in order to present a benchmarking of all the three countries.

⁹ However, this is not the current situation for Antalya (0.18).

¹⁰ See Section 2 for detailed information.

5. A benchmarking with Italy and Spain

5.1. Cultural and creative industries in Italy

CCIs accounts for an important share in Italy, around 3.5 of the total employment in 2011 (Tab. 5), as usually recorded in other studies (around 4–6 per cent in DCMS, 2001; Hall, 2000; Pratt, 1997). There are of course industries of greater importance, such as ‘manufacturing’ (24 per cent), ‘wholesale and trade’ (22 per cent), ‘real estate and business activities’ (16 per cent), ‘construction’ (10 per cent) and ‘transport and communication’ (7 per cent). Compared to these sectors, creative industries rank similarly as some important activities in Italy, such as ‘hotels and restaurants’ (7.73 per cent) and above ‘financial intermediation’ (3.7 per cent) and ‘agriculture’ (0.6 per cent). Remind that the definition in this study is narrow and those not taken into account are other creative activities such as craft, antique markets and others as in DCMS (2001).

Regarding the growth of CCIs, unfortunately, it is not possible to analyse the evolution of CCIs, as there has been a change in the economic activities definitions taken place in 2007, and it is not possible to compare the two Census of Industry and Trade of 2001 and 2011. At the moment data at three digits level are available only in 2001-1991 comparison.

Table 5. Employment by industries in Italy, 2011.

Economic activities	Employees 2011	% of total employment
Agriculture and mining	97,913	0.6 %
Manufacturing	3,892,202	24.6 %
Energy and water services	159,473	1.0 %
CCIs	545,600	3.4 %
Construction	1,600,233	10.1 %
Wholesale and trade	3,442,517	21.8 %
Hotel and Restaurants	1,220,529	7.7 %
Transport and Communication	1,093,953	6.9 %
Financial intermediation	597,334	3.7 %
Real estate, renting and business activities	2,508,048	15.8 %
Public services	593,765	3.7 %
Other sectors	579,307	3.6 %
Total	15,785,274	100.00%

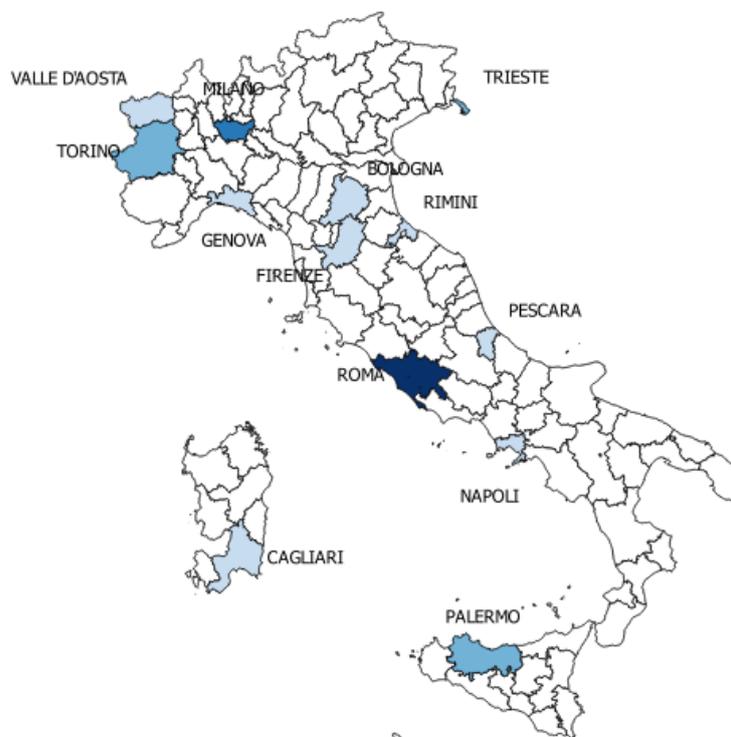
Source: Authors’ elaboration on Census Industry and Trade, 2011. Note: Since the creative industries belong to different sectors, data on creative employees are also computed within the various economic activities.

Map 2 presents the creative systems with high creativity in Italy (LQ above 1). There are about 12 provinces specialised in CCIs in Italy in 2011. LQs range from 1.1 to 2.9. The highest values are concentrated in the big cities like Rome, Turin, Milan as also recognised in other contributions (Capone, 2008). The total employment of these systems is over 302.000 units representing more than 55 per cent of the total employment in creative industries in Italy (545.600 workers). As reminded, CCIs are concentrated in few hotspots, 10% of provinces are then creative (12 on 110). CCIs are usually clustered in metropolises and large cities.

Regarding the percentage of employees in creative systems, over a total employment of 15.7 million, creative industries cover around 3.6 per cent of the total employment with a peak of 3.6 and 3.1 in Rome and Milan. To compare results with other studies, the contribution by Florida and Tinagli (2005) analyses creativity in 103 Italian provinces, and calculates a general Index of Creativity (ICI) for each of these, based on creative class, and technology and diversity indexes. The large cities are equally represented at the first five positions (Rome, Milan, Bologna, Trieste, Florence, and so on).

Remind that here we analyse only industries and no other public services as in other contributions (Capone, 2008), where the contributions on creative industries arrive at 5% on total national economy. Considering provinces instead of local labour systems, CCIS results more concentrated in the territory and less spread. This could be also due to a process of clustering from 2001 till 2011.

Map 2: Cultural and creative industries in Italy, 2011.



Source: Authors' elaboration on Census Industry and Trade, 2011.

Regarding territorial specialisation, Rome is the most specialised province in Italy in 2011 with a LQ of almost 3, it signifies that there is a concentration of CCIs three times more than the national average. Milan registers a LQ of 2.45 and far below there are other centres as Turin and Trieste and so on. Rome and Milan employs both almost 200,000 employees in CCIs, almost 36% of total employment in CCIs, confirming the great importance of these two centres (Tab. 7).

Regarding different sectors, *Design* and *Software* does not register relevant correlations with other activities. More correlated industries are *Publishing*, *Movies* and *Entertainment* that are concentrated in most places.

Publishing is in Rome and Milan. *Movie industry* is more concentrated in Rome and in other few centres. *Advertising* and *Music* are concentrated in Milan. *Entertainment* is more concentrated in traditional art cities as Rome and Florence.

Results highlight the importance of traditional creative industries in a country like Italy more related to cultural heritage instead of new creative activities linked to ICT, confirming a sort of Mediterranean traditional creativity such as also in France and Spain (Lazzeretti, 2013).

Table 7: LQ in Cultural and creative industries by provinces in Italy, 2011.

	Publishing	Software	Design	Movie and Video	Advertising	Entert. and Arts	Music	Radio and Tv	Photo	Weight CCIs	LQ CCIs
Rome	2.49	0.07	0.02	2.33	0.53	3.24	0.45	3.69	0.32	3.6 %	2.87
Milan	4.08	0.08	0.06	0.48	1.50	0.81	1.81	0.91	0.81	3.1 %	2.45
Turin	1.40	0.07	0.04	0.54	0.63	0.52	0.83	0.66	1.01	2.0 %	1.62
Trieste	1.40	0.00	0.00	0.64	0.43	1.43	0.21	3.01	0.81	2.0 %	1.58
Aosta	0.63	0.00	0.00	1.54	0.27	2.77	0.28	6.29	0.49	1.8 %	1.46
Palermo	0.93	0.01	0.01	1.07	0.82	1.29	0.69	0.68	0.92	1.4 %	1.12
Genova	1.21	0.01	0.00	1.31	1.01	3.63	-	1.18	1.55	1.4 %	1.12
Bologne	1.51	0.03	0.03	0.59	0.96	0.76	1.58	0.33	0.64	1.4 %	1.12
Rimini	2.62	0.00	0.01	0.23	2.17	2.16	2.30	0.17	1.09	1.4 %	1.10
Florence	1.33	0.02	0.03	0.51	0.81	1.16	1.01	0.56	0.56	1.4 %	1.08
Trento	0.80	0.01	0.01	0.92	0.62	1.86	1.00	0.73	0.55	1.3 %	1.06
Naples	1.12	0.03	0.01	0.83	0.67	2.85	1.66	1.71	1.32	1.3 %	1.05

Source: Authors' elaboration on Census Industry and Trade, 2011.

5.2. Cultural and creative industries in Spain

CCIs in Spain employ more than 962,000 workers in 2007 before the economic crisis. This value is the highest of the analysed countries, albeit here the definition of CCIs is different from the one proposed by DCMS (2013)¹¹.

It is difficult to follow the behaviour of the creative industries between late 2007 and 2011 for the delay in updating national accounts statistics and the introduction of a new classification of activities in 2009, as in Italy.

To track we used data occupied affiliated to social security from the Ministry of Labour. In general, the creative industries have not been immune to the effects of the crisis in Spain. In 2008 performed better than the overall economy, losing less than 2 % of workers compared to 4.8 % of all economy (Boix and Lazzeretti, 2012).

In 2009 and 2010 the rate of employment growth in the creative industries affiliated was similar to the overall economy. Not all creative activities have the same behaviour. Some have lost employment activities such as architecture and engineering, graphic arts and printing, publishing, and fashion. Other activities have not changed substantially: heritage, film, video and music writers, performing arts, visual arts and crafts, advertising, and radio and television. They have continued to grow, regardless of the crisis, design and photography activities, and software, video games and electronic publishing.

Table 8: Cultural and creative industries employment in Spain, 2004-2007.

Activity	Employment		% on total employment	
	2004	2007	2004	2007
Architecture	207.9	271.2	1.45	1.30
Publishing	252.2	248.9	1.08	1.26
Cinema, Video, Music and Television	136.9	153.7	0.79	0.81
Software	120.3	123.3	0.69	0.65
Advertising	62.6	75.1	0.36	0.39
Entertainment and Arts	39.9	45.3	0.23	0.24
Performing arts	39.3	45.3	0.23	0.24
Total	859.1	962.8	4.83	4.89

Source: Our elaboration from Boix and Lazzeretti, 2012.

Creative industries are highly concentrated in Spain, substantially more than in other countries (Map 3). Creative industries are concentrated mainly in the central parts of the metropolitan area of Madrid (31% occupancy) and Barcelona (19%) (Map 3). Similar dynamics are observed in other major European cities like Milan or Rome, while in London and Paris clusters of creative industries are located in large numbers in both the central city and the rest of the metropolitan area.

The map of Creative local productions systems (LPS) confirms patterns of spatial clustering (Map 3). Creative industries are strongly concentrated in a few places, forming clusters around Madrid, Barcelona, Basque Country-Navarre-Rioja, and Galicia, as well as Valencia and Seville, though have a special concentration in some LPSs, particularly those of Madrid and Barcelona. In fact, Madrid's LPS alone accounts for 30% of the Spanish employment in creative industries and

¹¹ 73.1 Advertising, 7.11 Architecture and Engineering, 47.79 Trade of antique goods, 74.1 Design, 14, 15.11, 15.2 Fashion, Movie and Video 5.91, 18.2, 5.92 Music and Music studio, Performing arts 90, Photo, 74.2, Graphic arts 18.1, Publishing, 58.1, Radio and Tv 60.1 and 60.2, Software and videogames and electronic editions 58.21, 58.29, 62.01, 62.02, Cultural heritage 91, Cultural tourism and recreational services 91, Toys production 32.1, 32.2, 3.24, R&D 7.21, 7.22.

Barcelona's for 15%. Both have 45% of the Spanish employment in creative industries and 69.5% of the employment in Creative LPSs.

Former analyses (Lazzeretti and Parrilli, 2012) exhibited the development of creative industries in Spain, which reckoned about 673,000 in Spain (4.1% of total employment) in 2001 that is consistent with the usual range of between 4-6% found in other studies (see for instance previous sections).

Traditional creative industries add up to about 458,000 in Spain, which represent 68% of total creative industries employment in Spain. Non-traditional creative industries had about 215,500 in Spain (32% of total creative industries employment in Spain).

Map 3: Employment in CCIs in Spain per local labour systems.



Source: Boix et al., 2013

In Lazzeretti et al. (2008), the method of identifying creative industries was applied in order to map creative industries' clustering in Italy and Spain. This allowed to identify creative LPSs divided in three categories (traditional, not traditional and diversified). On this basis, 25 LPSs were identified in Spain (3.1% of Spanish LPSs). Within the whole of the creative industry, there were 17 traditional Creative LPSs with about 79,000 employees in creative industries. In Spain, traditional Creative LPSs are associated with both medium-sized cities as well as larger cities such as Valencia and Seville. Surprisingly, there were no Creative LPS exclusively specialized in non-traditional creative industries. Diversified Creative LPSs are LPSs simultaneously specialize in traditional and non-traditional creative industries. There are 8 diversified Creative LPSs in Spain that add up to about 359,000 creative employees. This category contains the LPSs associated with the largest cities (Madrid, Barcelona, Bilbao, etc., with the exception of Valencia and Seville).

6. Conclusions

The aim of this contribution was to analyse the CCIs in Turkey according to the DCMS to make a first preliminary benchmarking with other European Countries, such as Italy and Spain. We began to investigate cultural and creative industries in the Mediterranean region, in order to identify any similar characteristics and main differences compared to the rest of Europe. Preliminary results show some interesting information (Tab. 9):

1) The 'creative sector' is an emerging sector also in this region and stands more or less on the same level of other European countries, except for Turkey which is about half the level, but in strong growth.

Italy and Spain record a percentage of CCIs on the national employment of about 4%, in line with previous studies that recognize the CCIs between 4-5% of total employment at the European level (Lazzeretti, 2013). Nonetheless, we remind that we have adopted a fairly narrow definition of CCIs which considers only the private sector and excludes many activities related to forms of informal economy such as crafts and antique markets. Turkey registers a percentage of CCIs approximately 2% of total employment with less than 200,000 employees, about one-third of employees of the other two countries.

If we analyse the evolution of CCIs, the situation is very different, partly because of the crisis that hit many European countries. In Spain, the CCIs lose jobs, but they still perform better than the other activities. In Turkey, the data is completely against the trend and the average growth rate of CCIs is 38% with some activities that double or even triple their employment in 4 years.

2) The cultural and creative industries are confirmed as a clustered phenomenon and concentrated in major urban areas in these countries.

The most important cities are the capital city and the most industrialized areas are Ankara and Istanbul, Rome and Milan and Barcelona and Madrid. Turkey and Spain demonstrate a geographic distribution of CCIs highly concentrated, with just a few creative hotspots, while Italy has a more widespread creativity (about 10% of the systems analysed). The highest values in Turkey are the main centres of the country, Istanbul and Ankara, respectively with a LQ of 1.71 , 1.53. The total employment of these two metropolises is over 122,000 units representing more than 64% per cent of the total employment in the creative industries in Turkey. Rome is the most specialised metropolis in Italy in 2011 with a LQ of almost 3. Milan registers a LQ of 2.45. Both Rome and Milan employ almost 200,000 employees in CCIs, almost 36% of total employment in the CCIs. Also in Spain, creative industries are concentrated mainly in the central parts of the metropolitan area of Madrid and Barcelona, respectively 31% and 19% of the total national employment in CCIs. They both account for 50 % of overall employment in the CCIs .

3) The dominant sectors that characterize the three countries are the traditional industries such as Advertising, Architecture, Entertainment and Publishing. This phenomenon, in addition to highlighting a historic and well-established presence of cultural industries in the Mediterranean countries, which differentiates them from the countries of northern Europe more oriented to ICT, it also denotes their common 'delay ' in the adoption of new technologies. Next to this aspect that is related to the cultural heritage endowment of these countries, it shows a new trend in the type-approval. While our previous studies recorded a different type of creativity between the north and the south of Europe characterized by heritage driven countries such as Italy and Spain different from the so-called technology -driven countries such as the UK, now the diffusion of

new technology finds himself a little everywhere, but especially in Turkey, where the growth of the creative industries mainly concerns the technological fields.

Certainly the analysis carried out, cannot be comprehensive of the cultural and creative sector as it collects also a good part of the informal economy that is not considered here, but this preliminary research needs to involve a good part also of the countries of North Africa to begin to outline what we have called, in a first approximation, a Mediterranean creativity. This new concept will need to be carefully studied using other tools than the statistics that we used, that are not always able to capture the many aspects in which it can be found.

Table 9: A benchmarking of CCIs in the three countries, 2011.

CCIs	Main Cities	Employees 2011	% on total employment	LQ	Percentage on CCIs	Growth in the period
Italy		545,600	3.4		100 %	-
	Rome	88,000	9.0	2.87	16.1 %	-
	Milan	103,000	9.5	2.45	19.0 %	-
Spain*		673,000	4.1		100 %	-
	Madrid	205,000	8.5	2.06	30.4 %	-
	Barcelona	99,177	7.4	1.79	14.7 %	-
Turkey		191,634	2.1		100 %	38 %
	Ankara	24,948	0.13	1.53	13.0 %	19 %
	Istanbul	97,547	0.51	1.71	50.9 %	46 %

Source: Authors' elaborations. *: Data refers to 2001.

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APPENDIX 1: Proposed list of Creative Industries

Code	Description
58.1	Publishing of books, periodicals and other publishing activities, to include
58.11	Book publishing
58.12	Publishing of directories and mailing lists
58.13	Publishing of newspapers
58.14	Publishing of journals & periodicals
58.19	Other publishing activities
58.2	Software publishing, to include
58.21	Publishing of computer games
58.29	Other software publishing
59.1	Motion picture, video and television programme activities, to include
59.11	Motion picture, video & TV programme production activities
59.12	Motion picture, video & TV programme post-production activities
59.13	Motion picture, video & TV programme distribution activities
59.14	Motion picture projection activities
59.2	Sound recording & music publishing activities
60	Programming and broadcasting activities, to include
60.1	Radio broadcasting
60.2	TV programming & broadcasting activities
62.01	Computer programming activities
62.02	Computer consultancy activities
71.11	Architectural activities
73.1	Advertising
73.11	Advertising agencies
70.21	PR & communication activities
73.12	Media representation
74.1	Specialised design activities
74.2	Photographic activities
74.30	Translation and interpretation activities
85.52	Cultural education
90.0	Creative, arts and entertainment activities, to include
90.01	Performing arts
90.02	Support activities to performing arts
90.03	Artistic creation
90.04	Operation of arts facilities

Source: DCMS, 2013, p. 12.