

Cultural industries in Swedish statistics

Proposal on delimitation for future mappings



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Foreword

Using the terms "creative" or "culture" as descriptors of industry has become increasingly noticeable over the last 10 years. One reason is that "creative industries" are sometimes assumed to produce growth in turnover, employment or income at a level higher than the average for the economy as a whole.

The Swedish Agency for Growth Policy Analysis has been commissioned to propose a definition of "creative industries" based on existing statistics. Taking as its starting point the study from UNESCO and Eurostat, the Swedish Agency for Growth Policy Analysis proposes the concept of "cultural industries". By using established studies to more clearly and precisely define terms, it becomes relatively easy to adapt Swedish statistics to the definitions which in all probability will be used internationally. This definition makes it possible to develop measures based on existing statistics for levels of value added, salary totals and employment data as well as the number of active companies. The term proposed can also be used in supplementary studies to analyse how "cultural industries" on their own or in interaction with other industries can contribute to sustainable growth.

The report is an abridged English version of the original Swedish report, filed at the Swedish ministry of enterprise June 2009, authored by Lars Bager-Sjögren and Anne Kolmodin. In addition to the authors, the Agency's project group consisted of Fredrik Junkka, Edgar Iglesias and Eva Alfredsson.

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Summary

The Swedish Agency for Growth Policy Analysis proposes that the concept of "cultural industries" be used instead of "creative industries", as the latter is too broad to be limited to a certain type of activity. Creativity is needed in all industrial branches.

The term proposed "Cultural industries" has the merit of being anchored in "The 2009 UNESCO Framework for cultural statistics" and in the French Ministry of Culture's report to Eurostat. Both these reports provide arguments for identifying cultural industries from three different approaches: industrial classification, vocational classification and product classification.

Cultural industries work mainly with those parts of "use value" which are not purely technically functional, values which in this report are referred to as cultural values. These can be described as social, aesthetic, historical, spiritual, symbolic and authentic. Values which are intimately connected with the definition of culture from an anthropological perspective, namely the forms by which people choose and build their lives. How individuals consume and allocate time to different activities are parts of this.

The definition chosen for cultural industries can be applied to existing Swedish register statistics, albeit with the shortcomings they have. The starting point, however, has been the most recent revision of the industrial classification since this has better disaggregation for the services sector. The disadvantage, however, is that analysis over time can not be done without a more detailed comparison of the amount of information lost between the earlier industrial classification system and the new one. The Agency will return to this in connection with its report on Part two of its commission.

The proposal can be summarised in the following points:

- Cultural industries instead of creative industries should be used as the term.
- Cultural industries can be defined in existing statistics
- A Swedish definition which can be easily adapted to match later harmonisation requirements for international comparisons.
- Indicators for production of cultural values in the whole economy can and should be made based on the "trident" approach.

It appears from the report that the definition can be used for the following purposes: 1) An estimate of "cultural industries in the economy (not the same as cultural satellite accounts) is another way of estimating culture in the national accounts 2) Regional distribution of cultural industries in the economy 3) Cultural industries by employees in these industries, and in cultural occupations outside these industries.

In the first instance what is interesting in a measure of a specific industrial branch is how large this is in relation to other industrial branches, how it changes over time and its interaction with other industries. Cultural industries are important building blocks in regional development plans. The definition proposed can serve as an instrument or mapping tool when making comparisons between regions over what "resources" in terms of cultural value producers are available in a region, and which can be mobilised for different purposes¹, such as promoting sustainable growth. The definition of cultural

¹Each region is free to develop their own mapping. When making comparisons, however, it is appropriate to identify the lowest common denominator.

industries is, however, less appropriate as a variable for outcomes of regional development in the industries.

1 Introduction

1.1 Commission to propose a definition of "creative industries"

The Agency has been commissioned "to develop a definition of creative industries" based on the use of existing statistics. The definition should thus not require the development of any new measuring instruments. The definition should be measured in the domains of employment, value-added as well as entrepreneurship in regions, and also over time. If a definition can be formulated, then the Agency in the second part of its commission will be responsible for producing the statistics in accordance with the definition. This commission should be completed by latest 30 October 2009.²

1.2 Problems with other definitions

All approaches that attempt to assign an analytical area to groups encounter problems in defining what should be included and excluded in a group. This applies to the definition not only of a broad group of categories, such as industries and services or more specific categories such as "environmental technology companies". The ITPS report "Kreativ tillväxt (Creative Growth)"³ describes two definitions, not only the Swedish term "the experience industry" based on the definition of the Knowledge Foundation⁴, but also the term "Cultural Economy" which is based on the definition used in the EU publication "The Economy of Culture in Europe"⁵ (KEA report). The ITPS report describes the following problems with the two definitions:

- Overlap with other statistical collections/compilations
- Heterogeneity of activities
 - Proportions of industry branches are included where the proportion is randomly determined (indirect measurement)
 - Comparability between countries can only be achieved at a relatively high level of aggregation which may lead to overestimates at sub-levels due to inconsistencies in the application of definitions.
- The assumption that the value of "experiences" "culture" is only produced in the identified sectors

Two situations are highlighted by the ITPS report. The first is that the two definitions cover different parts of the economy even though they aim at measuring the same thing. The second situation which follows from the first is that when making comparisons with other regions/countries, it is important that the same industries be included for the comparisons are to be meaningful.

Apart from these problems, there are also some errors in existing statistics, arising from how they are collected and updated, which may differ in different countries. In Sweden the occupational classification of the labour force is not measured each year. For some

² Business activity refers to legal and physical entities which are included in the business register http://www.scb.se/Pages/List___258736.aspx

³ ITPS (2008)

⁴ See Pine & Gilmore (1999) the Knowledge Foundation (2003) or the ITPS report in the previous footnote.

⁵ KEA (2006). The KEA report was carried out on a commission from the European Commission where the aim was to report on Community statistics for EU member countries.

employees, the data may be 10 years old. It is also the case that companies have been allocated incorrect classification codes. These problems are not discussed further in this report.

1.2.1 Overlap with other developed statistical collections and compilations

The ITPS report estimated that the number of employees in the "experience industry" was slightly more than 434 000. Of these slightly more than 128 000 (30 %) were employees, who were also included in statistics on tourism where they accounted for 65% of all employees in tourism (see Table 1 below). With such a major overlap it should be possible to determine whether a term such as the experience industry provides information in addition to that provided by statistics on tourism. In Table 1, for example we see that as much as 30% of employees in the experience industry are also included in the definition of tourism. This may be acceptable, but the question arises as to why everything that is regarded as tourism is not included, and if we should view this as a natural sub-component in experience production or part of its value chain. Tourism, however, is a well developed field with well-established definitions, research fields and with various representative organisations. It is possible that arguments will be developed for re-orienting our view of how we should regard consumption of services. But before such a reform is implemented, we consider that a new definition in the first instance should supplement existing fields.⁶ However, we do not consider that the term "experience" is uninteresting from an economic perspective, but that the to derive reliable estimates of this as a specific sector in the current statistics is simply too difficult.

Table 1 Employment in Sweden 2005.

	Experience industry	Common	Tourism
SNI 17-19 Textile, shoe and leather industry	2 047	0	0
SNI 22 Publishing industry	51 241	0	0
SNI 36 Furniture industry	1 216	0	0
SNI 51-52 Retailing	55 840	4 335	37 000
SNI 55 Hotel and restaurant	156 110	79 434	83 311
SNI 60-63 Transport and travel agencies	30 496	26 719	33 645
SNI 70 Property companies and managers	5 881	5 881	6 596
SNI 71-72 Leasing and computer consulting	2,980	119	1 185
SNI 74 Other services	6 ,740	1 135	13 979
SNI 75 Civil Authority	0	0	388
SNI 80 Educational facilities	2 040	0	0
SNI 92-93 Recreation, culture and sport	64 735	10 635	19 491
Total	434 323	128 255	195 596

Source: Statistics Sweden, Lisa, ITPS (2008)s 64., Lisa ,Tourism satellite accounts

⁶ *Tourism as promotional excursions are undoubtedly intimately related to cultural industries. The KEA report "The Economy of Culture in Europe" produced for the EU Commission refers to a number of different festivals and other events that have been of importance for regional development. The classical case is the theatre festival in Arles and the Guggenheim Museum in Bilbao. One criticism in comparing the experience industry and tourist sector in this way is that former measures employment from a producer perspective whilst the latter measures employment from a consumer perspective.*

1.2.2 Heterogeneity of activities

Heterogeneity refers to variation which in this case is not desirable. The definitions examined in the ITPS report differed in the sense that different industries were included in the respective definitions. In one definition, a choice was made to include more manufacturing and retailing industry, whilst in the other, more tourist related service industries such as restaurants and hotels were included. This problem will remain if countries (regions) do not use exactly the same definition

Another problem which the ITPS report highlighted was that comparability between countries only existed at a certain level in the classification systems. If a definition delimits industries at the most disaggregated level, for comparisons to be valid they must also be based on measurements at the same level. Comparisons are only meaningful if the countries have included the *same* industries at the most disaggregated level which is not always the case.⁷

Another type of heterogeneity introduced in the definition is when different industries are merged on the grounds that from a specific aspect they are regarded as forming some type of value chain. If the desire is to estimate the proportion that the creative or cultural industries make up of the whole economy, then both the production and distribution segments must be included.⁸ It is difficult to delimit with any precision the production chain. It is a greater difficulty to delimit the distribution chain (and intermediate producers) since they often have more products to disseminate than those being focused on.

How large a proportion of a specific industrial branch uses/mediates a certain product is not indicated in existing statistics, and would require special study.⁹

1.2.3 Assuming that the values for "experience" and "culture" are only produced within the identified sectors

The discussion on "creative industries" has mainly been based on the notion that certain industrial activities – namely those delimited by a definition of "creative industries" - represent a special kind of production of value. What is sometimes overlooked is that there are individuals with the same occupational classification outside the definitions of industries who are working in these industries. This indicates that similar values/products are also produced outside the industries the definition identifies. Studies from the UK show that there may be as many employees in the "core occupation" in creative industries as there are employees outside. A definition should take account of this and we will be proposing how this could be approached.¹⁰

⁷ This is examined in more detail in section 2.2.,

⁸ The alternative is to make direct measurements of final consumption which must then be identified.

⁹ Detailed input output tables make this possible. Sweden, however, does not have such detailed input- output tables allowing this to be done for the industries we have discussed here.

¹⁰ See Higgs, Cunningham & Bakhshi (2008).

2 From "creative industries" to "cultural industries"

This section presents the definition of cultural industries proposed by the Agency. The term "cultural industries" should avoid linkages to "creative industries" and "similar". The Agency bases its reasoning particularly on the proposal for "cultural industries" which UNESCO proposed in a recently published report, as well as the proposals put forward by the French Ministry of Culture in a report to Eurostat in 2008. Swedish data for the definition chosen exists in statistics that have been collected since 2007.^{11 12}

2.1 Differentiating cultural industries from other industries

There is a substantial volume of literature and debate concerning different methods of differentiating between creative industries or cultural industries. The French report to Eurostat provides a concise summary of different attributes proposed for such a sector:

Creativity – Activities are typified by new creations.

Copyright – Defining a sector based on industrial activities related to the use of copyright materials.

Use value – The usability of a good from the creative sector is typified more by "ideas" than technical (functional) qualities

Production methods – High initial cost and relatively low marginal costs are described as being typical of many cultural products. A song recorded digitally is easy to copy at zero cost. Apart from this, it has been maintained that contracts and business agreements between players in these industries are particularly difficult to formulate.¹³

Unfortunately, criticism can be made of each point where it denotes a specific sector. In all activities generating knowledge, where knowledge can be codified, handbooks written, there are high initial costs connected with low marginal costs. Contractual disputes in creative industries are no more difficult than other activities working on a project basis. It is doubtful that the uncertainty of business projects in "creative industries" would be greater. There are always a certain number of businesses where entrepreneurs have considered conditions to be more positive than they actually turn out to be. It has also been argued that one must look at the "totality" of these different aspects as they show the differences between "creative industries" and other industries.¹⁴ How such a "whole" should be determined remains unclear.

It is our view that two conditions are interesting when it comes to products to be defined as "creative". One is that their "use value" differs from such values for other products. The

¹¹ UNESCO (2007) and also the Ministry of Culture and Communication France (2008).

¹² The Swedish Agency for Growth Policy Analysis together with the Swedish Arts Council is represented in the Eurostat project on harmonising cultural statistics. There is a special working group in the project on "Creative Industries". The project will be concluded by 2011.

¹³ See Caves (2000)

One criticism of these terms from a cultural perspective comes from Galloway & Dunlop (2007). The criticism is based mainly on the view that the definitions put forward do not take due regard to the core values of "cultural production", the production of which according to the authors requires public support.

¹⁴ Hesmondhalg (2007)

second condition is connected with the difficulties for producers to appropriate parts of the economic value since positive externalities are often involved.

2.1.1 The term culture and cultural value as a kind of use value

The word "culture" has been developed from the narrow approach used in "the free types of arts" to describe in more anthropological terms different ways of living: for example, ethnic signs to how people "construct" their daily lives. In fact a term for culture that covers virtually everything and as such has little meaning. Despite this, we consider that the term "culture" is nevertheless less controversial than the term "creative" for distinguishing between activities, and particularly the industrial branches we highlight here.

David Throsby puts forward in his book *Economics and Culture* (2001) the view that there are primarily two descriptions or definitions of culture, both of which are relevant in a discussion on identifying certain industries as "cultural industries".

One is related to culture as a term for the attitudes, traditions and other habits distinguishing one group from another. Groups can be identified with respect to region, religion, ethnicity, political approaches or, for instance, youth culture. A group may differ in terms of the signs, symbols, texts, languages, objects and references to different types of traditions. Just as we refer in Sweden to a Sami culture, we can refer to a youth culture or company culture. The functions of these expressions is to establish the identity and affiliation of groups.

The second description of culture relevant in our context is more functionally oriented. Cultural activities are regarded as:

*"...activities undertaken by people and the product of those activities, which have to do with the intellectual, moral and artistic aspects of human life.' Culture' in this sense relates to activities drawing upon enlightenment and education of the mind rather than the acquisition of purely technical or vocational skills."*¹⁵

Throsby describes three characteristics of such "cultural activities or products" .

- They are related to some form of creative work
- They are related to creation and communication through symbols
- They are related to some aspect of intellectual property rights (copyright, industrial design rights)

Both the KEA report, titled "Economy of culture in Europe" and the UNESCO report which also explicitly refers to the method used for describing "cultural industries" may be said to have been influenced by Throsby's definition.¹⁶

Cultural value in comparison to technical-functional values

David Throsby also discusses what attributes or values "cultural products" convey that could distinguish them from other products or services. Above we used the term "use value" which connotes the usability of a product for an individual. In other contexts the term "immaterial values" occurs as a recognition that the value for a specific individual does not always correspond to the price, and also that the functional value is not just of a

¹⁵ Throsby (2001),p. 4, authors' underlining.

¹⁶ KEA (2006). Other leading analyses referring to Throsby are: The report *Staying Ahead from the UK's Work Foundation* (2007) see the description of this in *ITPS* (2008).

"technical" nature. In the ITPS report *Kreativ tillväxt (Creative growth)*, the term used for values which are typical of cultural products was "expressive values".¹⁷ Throsby uses the term "cultural values" for the specific "use value" by which cultural products may be characterised. We follow this nomenclature and call them "cultural values". Throsby makes the case that the following are dimensions of such values:¹⁸¹⁹

Aesthetic	Beauty, harmony and form
Spiritual	Values of a secular or religious content which reflect man's attempts to attain meaningfulness*
Social	Values which create social contexts between individuals
Historical	Values which satisfy the need for historical authenticity
Symbolic	Individuals can provide meaning for objects and events which thus become symbols.
Authentic	Values of originality, genuineness

*However, we do not include religious associations in our definition

In contrast to "use value", prices represent exchange value on a market. Neoclassical economic theory views such values in terms of marginal utility. The price of a given good at a given point in time is determined by the marginal usefulness which an individual attributes to the good at that time. Values in addition to price, are regarded as externalities which could not be appropriated via the "owner" the producer of value. These values where they are greater than price are to be regarded as a consumer surplus. In principle, it can be said that a purchase is not made unless the consumer surplus is greater than or equivalent to zero.

2.1.2 Why culture rather than creative ?

Culture and creativity are both terms which are difficult to define precisely. In the report from the French Ministry of Culture, the authors pointed out the difficulties of agreeing on what is covered in the concept of "culture" :

*Approaches are many, often mingling the aesthetic, ethnological, economic, social or political viewpoints and so making it difficult to reach a true consensus on the definition of the cultural field and its boundaries.*²⁰

Above, it was determined that the route which Throsby sets out is a reasonable starting point that recurs in a number of reports.

The term "creativity" is difficult and imprecise. Criticism of the term "creative industries" applies particularly since the word "creativity" is usually used in more contexts as an intensifier than the term culture. Reference is often made to creative environments in the context of research and development, and also that at the regular workplace creativity should be encouraged in daily work tasks. Richard Florida's books on the "creative classes" are examples of how the term "creative" has been used in other settings that have had an impact. The report from the French Ministry of Culture states that:

¹⁷ *Expressive values was a term used by the British Working Life Foundation's report " Staying Ahead" .*

¹⁸ *Other expression close to this is "intrinsic value" or "perceived value". Especially, however, "use-value" has been a concept in Marxian theory. The way "use-value" is treated there has also some aspects relevant to the discussion here.*

¹⁹ *Throsby (2001), p. 28*

²⁰ *Ministry of Culture and Communication France (2008), p. 19.*

This criterion – in the sense of the ability to create or invent – would seem to be too broad, since any innovation of whatever kind implies by definition a measure of creativity, so that any industry whatever would qualify as being 'creative'. The criterion of creativity would need to be further defined before it could be used.²¹

Creativity and creative environments are terms that are important for the analysis of growth and regional development. It is thus not appropriate to reserve these terms for certain industries or occupations.

2.1.3 Cultural activities and cultural industries

Non-profit organisations without employees or which for other reasons are not included in business statistics are outside the scope of the discussion in this report. These associations contribute production of cultural value which should not be ignored. A distinction should thus be drawn between cultural activities and cultural industries. The first refers to all types of activities, creating and producing cultural value, whilst the second is limited to those activities which are economic in nature and of such scope that they appear in the business register.

2.2 Two proposals and a Swedish adaptation of these

The French Ministry of Culture's report to Eurostat (which we refer to as the Eurostat report) and UNESCO's proposals for a framework for cultural industries (UNESCO report) is the direct point of departure we have taken for the proposals in this report for the Swedish definition of "cultural industries" .

2.2.1 Cultural industries as per UNESCO and Eurostat

In many proposals put forward for "Cultural industries" and "Creative industries", there are a number of industrial branches, common to both of them. Essentially, there are three differences in the definitions put forward.

- How the domains included are determined (sub sectors) in the definition
- Number of different industry domains considered to be relevant for inclusion²²
- How many industrial branches are included in different domains

UNESCO's proposal, shown in Figure 1, considers that cultural content is secondary in the products of certain industries, and that this justifies treating them in a special way. The definition of cultural industries can thus be divided into a "core" definition and a broader "extended" definition.

Each industry can schematically be divided up into a value chain or production cycle which starts with an idea (creation) followed by verification (selection), production, distribution, "sales" and finishes with consumption/participation. This is shown in Figure 2.

²¹ Ministry of Culture and Communication France (2008), p. 6.

²² For example, in the UK the Ministry of Culture (DCMS) uses the definition of "Creative Industries" from UNESCO. DCMS includes both industries producing software programs (reason being these are regarded as "text") and "marketing /advertising industries" .

Figure 1 Unesco's suggestion for domains of cultural industries

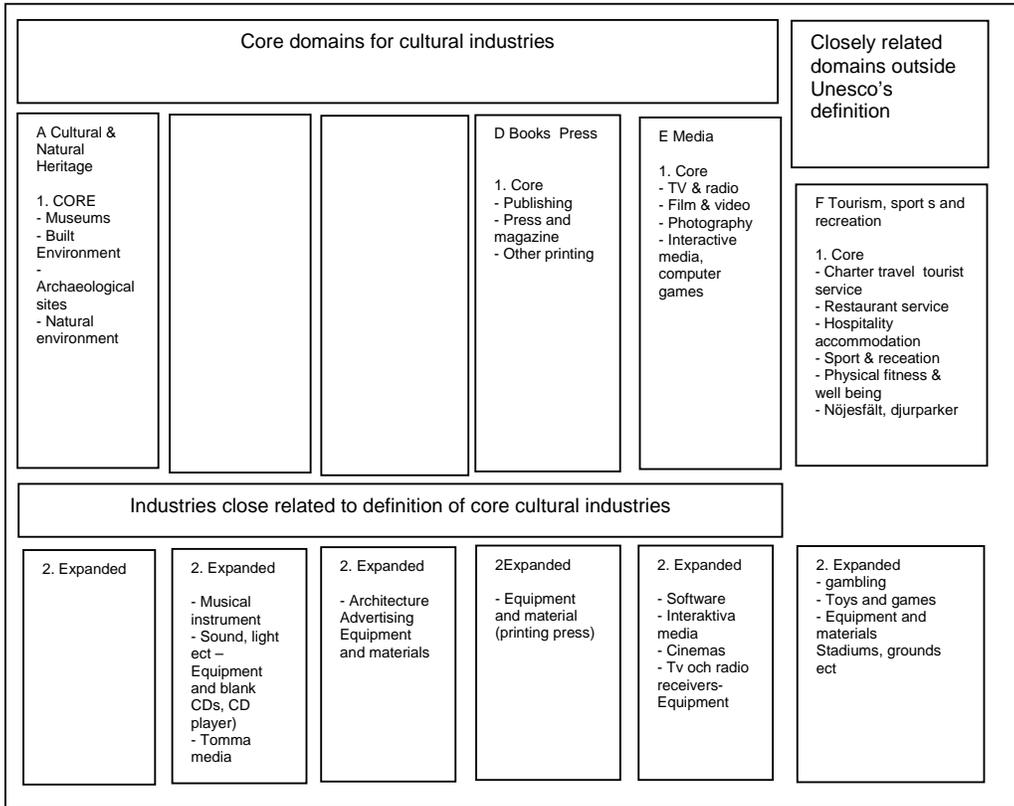
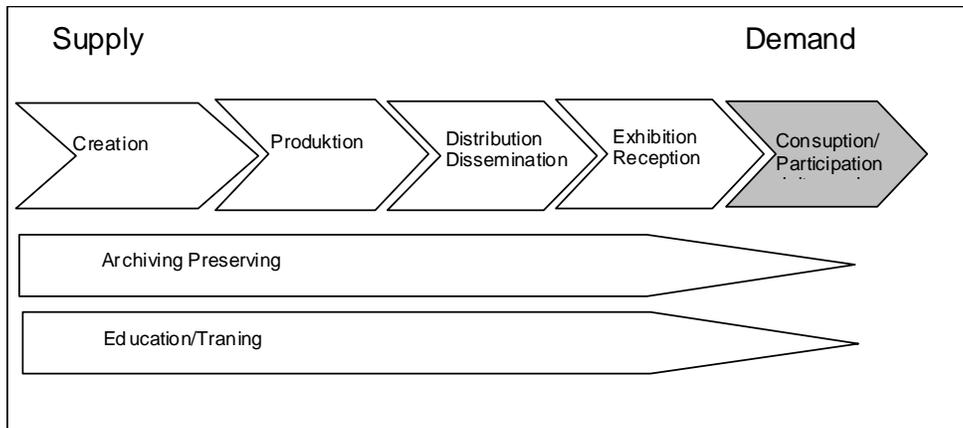


Figure 2 Value chain or product chain model



Note: UNESCO do not discuss explicitly the position of financing in the value chain

The formulation is very similar in the Eurostat report. Eight cultural domains are identified within which there are six functions (see Figure 3). The functions are similar to those used in UNESCO's product chain. For each domain there are thus 6 functions and if the number of domains were 8, 48 "industries" could be identified.

Figure 3 The Eurostat report's suggestion of 8 domains and 6 functions

Cultural domains	Functions within each domain
Cultural heritage	Preservation
Archives	Creation
Libraries	Production
Books and newspapers/magazines	Distribution
Visual Arts	Trade
Architecture	Education
Performing Arts	
Media/multimedia	

Source: Ministry of Culture and Communication France (2008)

Both UNESCO and the Eurostat report value certain activities as being more cultural than others. UNESCO divides up cultural industries into "core" industries and more peripheral "extended" industries, whilst Eurostat takes a similar approach but does this in an appendix using the terms "cultural", "fairly cultural" and "less cultural". Certain industries are categorised differently, for example, UNESCO categorises the industry "architectural services" peripherally, whilst Eurostat defines it as a "core domain".

UNESCO categorises "architectural services" at the same level as goods such as musical instruments, lighting and sound equipment, blank media and TV and radio equipment. UNESCO also defines software as something included even though it is more peripheral. In the core domain UNESCO differs from Eurostat by including handicrafts. Yet another complication is where advertising and marketing should be assigned. Eurostat considers this activity to be "fairly cultural" and UNESCO assigns it to the "extended" or peripheral part.

Making use of existing statistics

The UNESCO report takes up three relevant sources of statistics:

- One source is business statistics which are categorised in accordance with the international standard for industrial classification, ISIC. The Swedish industrial classification standard, SNI2007, is adapted to the EU's adaptation of ISIC, known under the title NACE (revision 2). Of the five levels made up by the classification, the first four (NACE4) coincide with the EU's, and the last level is an adaptation to nationally specific conditions.²³
- The second source is individual statistics. Individuals are assigned occupations in accordance with the international standards for occupational classification, ISCO-88, developed by the UN body, the ILO. It has a code consisting of four digits. When Sweden became a member of the EU, this four digit code was introduced as a standard referred to as SSK. Here the first three digits are identical with ISCO-88, and the fourth digit is unique to the specific conditions of different countries. ISCO is currently being revised and this will have an impact on the scope for better identifying certain occupations as "cultural occupations".²⁴
- The third source is product statistics. Sweden uses SPIN, the Swedish product classification by industry. A new categorisation system has been used from 2007.

²³ SCB (2007) See Chapter 4 for information on the categorisation.

²⁴ SCB (2001)

The Swedish SPIN follows the EU's Classification of Products by Activity 2008 (CPA) which is the Community classification for member states. Here the two classification systems are identical not only in terms of the first four levels, but also the seventh level which is the most detailed.

For example, interactive games (computer games) can be traced via product statistics (SPIN2007) by the code 62.010.03 *Software for games* (original). One detail is that SPIN 2007 is identical to SNI 2007 as well as to SNI's lowest level (most detailed). In other words the corresponding *categories* in SNI are the same as 62010 which has the category *computer programming services*. The product register thus appears to be useful for selecting certain companies which are classified in an industrial category composed of heterogeneous groups.

If we look for interactive games in the industrial classification (SNI 2007), we find 58210 *publisher of computer games*. This means that it lies under the group *Information and communication activities*.²⁵ For instance, if we search in the Market Media database for some of Sweden's game producers, we find that they are classified as 58210, namely publishers of computer games. In this example, product classification can provide support for finding companies that are not classified as publishers of computer games, but nevertheless produce such services. Here the product register functions as a complement to identifying exclusively via industrial branches.

Another example is *advertising and marketing*. Services which are related to the design of advertisements are interesting from the perspective of cultural value in contrast to the sales of media space. In this case the product register (SPIN2007) can identify companies providing the services specified in 73.111.02 *Reklam och konceptutvecklingstjänster Advertising and design concept development services* which are of more relevance for inclusion than existing companies classified in SNI2007 73.11 *Reklambyråverksamhet Advertising agency activities*. However, the dilemma is that in a number of such companies, design concept development is integrated with other activities which could lead to misleading results when applying product classifications inappropriately.

UNESCO's recommendation is to take products as the starting point, but they also state that many countries do not have well-developed product registers. The Agency, however, considers that a Swedish delimitation should be based on combining the use of information in the vocational classification, (SSYK) with and the industrial classification (SNI2007), but using special controls for certain well-known products considered relevant. And then use the product register to trace the companies (and their industrial affiliations) producing these.

"Cultural Trident "

Combining vocational classification with industrial classification has been discussed for some years. In Australia the method known as the "creative trident" has been applied by the researchers, Stephen Higgs and Stuart Cunningham. It has also recently been applied in the UK in a report from NESTA. In addition the "trident" has been launched by the French Ministry of Culture, most recently in the report to Eurostat under the title "Global Matrix of Cultural Coefficients" .^{26 27}

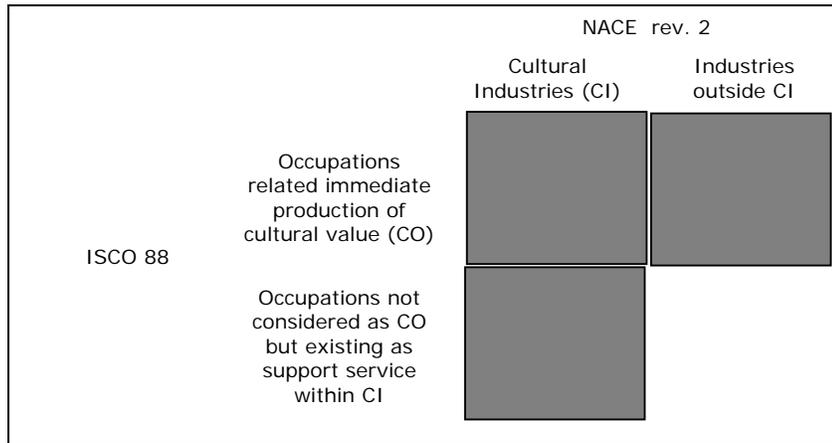
²⁵ Since the fifth digit is zero, it is consistent with EU countries that have implemented NACE rev 2.

²⁶ Higgs, Cunningham & Bakhshi (2008). The term "trident", denotes the three fields where measurable indicators are desired.

²⁷ Ministry of Culture and Communication France (2008), p.34.

Figure 4 illustrates this in the Eurostat report but with the use of our terms. The three grey fields are the areas making up the economic "cultural sector" . It thus consists of employment in "cultural" occupations in "cultural industries" . It also consists of "non-cultural occupations " where persons are employed in cultural industries probably as "support functions" for producers of cultural value. Finally the sector consists of those working in cultural occupations outside cultural industries. These persons may be designers in industrial companies or architects in construction companies and similar. NESTA's report found that there were as many persons employed in their category of "creative occupations" outside "creative industries" as in these industries. The Trident approach in other words is a means of identifying the size of the whole economy in a given, identifiable area. This approach can, of course, be applied in areas other than culture. For example, a study focusing on which professions and industries are attracting persons with postgraduate qualifications would be useful.

Figure 4 Measuring production of cultural value in the economy, "Cultural trident". Grey fields measures parameter of interest e.g. employment.



The Eurostat report states that since member countries have not sufficiently harmonised their statistics, information in the intersection between industrial classification and occupational classification has only been produced at aggregate levels. The report states, for instance, that countries that are able to estimate the number of employees at a disaggregated level can make a valuable contribution to the improvement of Community statistics. Here Sweden could relatively easily contribute to this work.²⁸

2.2.2 A Swedish definition of cultural industries

The work of ITPS on creative industries shows it is important to minimise the scope of arbitrariness in the formulation of a definition. Adopting an internationally recognised definition is preferable to constructing a national equivalent. The two proposals above can be said to be in line with a large number of reports dealing with the question of creative and cultural industries. Both reports fall into the category "Cultural Industries" and there is a large degree of correspondence between these two reports on what should make up these cultural industries. The differences between the UNESCO and Eurostat reports mean that it would be most appropriate in the current situation to draw up a Swedish definition for Swedish conditions.

²⁸ Ministry of Culture and Communication France (2008) p. 35.

There is a tradition in Sweden similar to that in other countries to attribute certain activities to the cultural area, one example being architecture. Some years ago the Ministry of Culture established the "National Council for Architecture, Form and Design" to develop policy in the area. In contrast to UNESCO's assessment, we consider that "architecture" is an activity that should be included in cultural industries.

Developing computer programs (software) may be said to be "text" and thus culturally related. Digital technology is a generic technology that can be applied in most areas, and could thus dominate other more traditional cultural industries. In contrast to UNESCO's definition which includes production of software in its expanded definition, we recommend that everything in IT be excluded from cultural industries except for specific industries with final products that are bearers of cultural product values. Virtually all reports on cultural industries are unanimous in viewing interactive games (computer games) as such products. An overall view of IT industries is in addition produced today and catches instead the dynamics concerning these. One exception applies to activities that produce interactive games/computer games which are usually regarded as being part of cultural industry.

On the other hand, we share UNESCO's view that "handicrafts" should be included in the cultural industries sector. Handicrafts usually state that they are working in a tradition which is related to such "cultural product values" as mentioned above. Handicrafts are not defined in the industrial classification, but can be identified in the vocational classification through the definition below:

*... requires knowledge of the materials used and covers a substantial proportion of the phases involved in the production of the final product.*²⁹

One problem is how to view advertising and marketing. The Eurostat report includes these. At present the proposal is that the product "Advertising design and concept development" be included, but as this is also integrated in larger advertising agencies, it would probably be necessary to include the whole industrial branch. In this case the proportion of employment and income in this industry branch should be examined.

Another problem is how we should regard education. Purely commercial education institutions in the area should be included, but institutions such as university colleges should be further discussed.³⁰

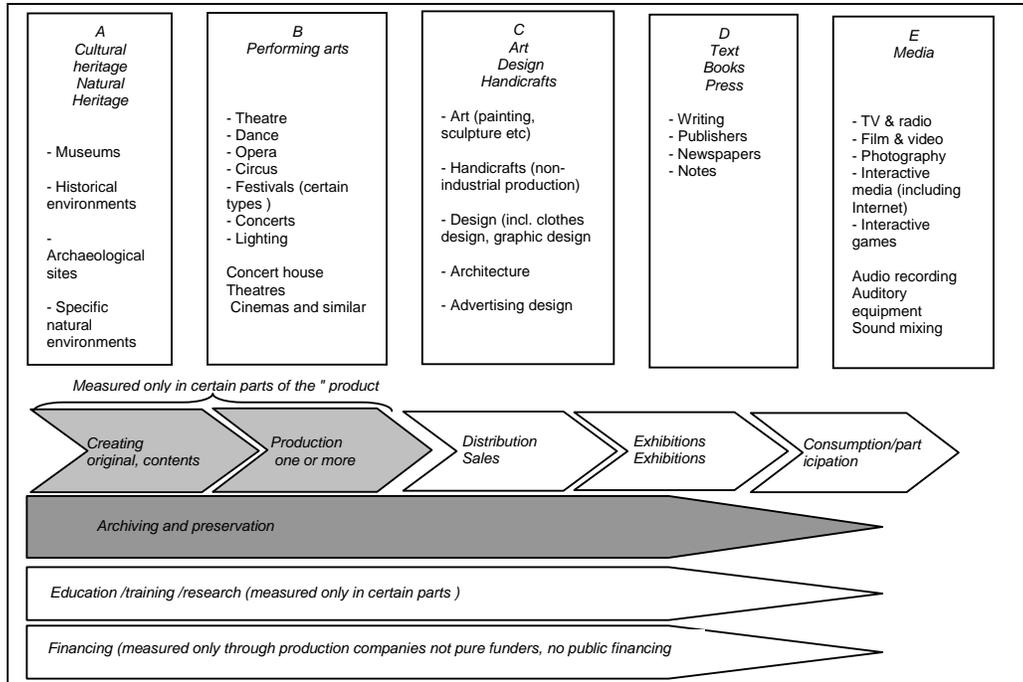
Finally, the judgement can be made that it is the mapping of the creation and production of "cultural value" which is of interest in the first instance, and this could be used as a basis for further analysis. Distribution, for example in retailing or via the Internet, and mass production manufacturing (book printing) are all examples of industries that can dominate cultural core activities. It is possible that activities such as book printing should be included, particularly for comparisons with other countries, but we consider that this would be relatively simple to add in such cases.

Figure 5 shows the stylised, adapted model we derive. The groups A-E relate only to UNESCO's proposal.

²⁹ SCB (2001).

³⁰ A future revision of occupational classification will make it possible to identify teachers in specifically culturally related subjects.

Figure 5 The Agency's proposal for domains to consider in the production of statistics for "cultural industries"



Note: The definition does not measure distribution or " empty media", and instrument manufacturing only if this part of handicrafts.

Tables 2, 3 and 4 show the industrial branches, occupational groups and relevant product categories which can serve as a starting point for mapping "cultural industries" /"cultural employment" in the Swedish economy. The tables focus on the "production" of "cultural values" where production also includes further use or the transformation of cultural values.

The delimitation proposed marks a turning point compared to the approaches taken by UNESCO and Eurostat to catch the whole cultural economy through a "production cycle approach" where initiation, production, and distribution are included. This attempt is praiseworthy but runs the risk of diverting attention away from "core producers" . We consider, however, that in relation to the arguments developed and the evidence provided on how both manufacturing industry and retailing can be included in an appropriate way that it would be relatively simple to add this to the Swedish definition. Although we propose a Swedish definition where only creativity and production are included, accessibility to data would allow us to simply and relatively quickly adapt to a situation when a harmonised definition for the EU is adopted.

Table 2 Cultural Industries in NACE rev. 2

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*
58.21 Publishing of computer games
58.29 Other software publishing
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
59.20 Sound recording and music publishing activities
60.10 Radio broadcasting
60.21 Television programming and broadcasting activities, except by subscription
60.22 Television programming and broadcasting activities by subscription
63.21 News agency activities
63.29 Other information service activities n.e.c.
71.11 Architectural activities
71.12 Engineering activities and related technical consultancy
71.20 Technical testing and analysis
73.11 Advertising agencies
73.12 Media representation services
73.20 Market research and public opinion polling
74.10 Specialized design activities
74.20 Photographic activities
74.30 Translation and interpretation activities
74.90 Other professional, scientific and technical activities n.e.c.
85.52 Cultural education
90.0 Creative, arts and entertainment activities
90.01 Performing arts
90.02 Support activities to performing arts
90.03 Artistic creation
90.04 Operation of arts facilities
91.01 Library and archives activities
91.02 Museums activities
91.03 Operation of historical sites and buildings and similar visitor attractions
91.04 Botanical and zoological gardens and nature reserves activities

Table 3 Relevant occupational groups in ISCO-88 ³¹

2141	Architects, town and traffic planners
2431	Archivists and curators
2432	Librarians and related information professionals
2442	Sociologists, anthropologists and related professionals
2451	Authors, journalists and other writers
2452	Sculptors, painters and related artists
2453	Composers, musicians and singers
2454	Choreographers and dancers
2455	Film, stage and related actors and directors
3118	Draughtspersons (?)
3131	Photographers and image and sound recording equipment operators
3429	Business services agents and trade brokers not elsewhere classified
3471	Decorators and commercial designers
3472	Radio, television and other announcers
3473	Street, night-club and related musicians, singers and dancers
3474	Clowns, magicians, acrobats and related associate professionals
4141	Library and filing clerks
5113	Travel guides
7311	Precision-instrument makers and repairers
7312	Musical instrument makers and tuners
7313	Jewellery and precious-metal workers
7321	Abrasive wheel formers, potters and related workers
7322	Glass makers, cutters, grinders and finishers
7323	Glass engravers and etchers
7324	Glass, ceramics and related decorative painters
7331	Handicraft workers in wood and related materials
7332	Handicraft workers in textile, leather and related materials
7341	Compositors, typesetters and related workers
7342	Stereotypers and electrotypers
7343	Printing engravers and etchers
7344	Photographic and related workers
7345	Bookbinders and related workers
7346	Silk-screen, block and textile printers
7421	Wood treaters
7422	Cabinet makers and related workers
7423	Woodworking machine setters and setter-operators
7424	Basketry weavers, brush makers and related workers
7431	Fibre preparers
7432	Weavers, knitters and related workers
7433	Tailors, dressmakers and hatters
7434	Furriers and related workers
7435	Textile, leather and related pattern-makers and cutters
7436	Sewers, embroiderers and related workers
7437	Upholsterers and related workers
7441	Pelt dressers, tanners and fellmongers
7442	Shoe-makers and related workers

³¹ In Sweden following categories are defined which also can be relevant *2413 market analysts* *2456' Designers'*
3476 Stage manager

Table 4 Relevant product categories (not an exhaustive list)

Code	Heading
58	Publishing services
59	Motion picture, video and television programme production services, sound recording and music publishing
60	Programming and broadcasting services
62.01.21	Computer games software originals
63	Information services
69.10.15	Legal services concerning patents, copyrights and other intellectual property rights
71.11	Architectural services
72.20.2	Research and experimental development services in humanities
73.11.11	Full service advertising services
73.11.13	Advertising design and concept development services
74.10.1	Interior, industrial and other specialised design services
74.10.2	Design originals
74.20.1	Photographic plates and film, other than cinematographic, exposed
74.20.2	Specialised photography services
74.20.3	Other photographic services
74.30.1	Translation and interpretation services
84.12.14	Administrative recreational, cultural and religious services
85.52.11	Dancing schools and dance instructors services
85.52.12	Music schools and music instructors services
85.52.13	Fine arts schools and arts instruction services
85.52.19	Other cultural education services
90.01	Services of performing artists
90.02	Support services to performing arts
90.03	Artistic creation
90.04	Arts facility operation services
91.01	Library and archive services
91.02	Museum services
91.03	Operation services of historical sites and buildings and similar visitor attractions
91.04	Botanical and zoological garden services and nature reserve services

Tables 5 and 6 show the approach used for managing existing statistics in order to obtain measures for a number of indicators.

Table 5 Method for identifying activities in "cultural industries"

1	Use identified cultural industries as per table 2 primarily via SNI2007 (NACE rev 2) classification
2	Supplement with the activities (companies) producing goods/services as per identified "cultural products" in accordance with Table 4 if these are not already included in relation to SNI2007
	Indicators obtained: Number of enterprises (number of organisation registration numbers) producing plant or products of value. Total of value added for these companies Distribution by size with respect to the number of employees in the companies Number of employees in these companies Regional (County) distribution Industry categories

Table 6 Method for identifying employees producing "cultural value products"

1	Use identified cultural occupations as per Table 3 in accordance with the SSYK classification
2	Assign these as proportions of employees in "cultural industries" as per Table 4 and "other sectors" .
	Indicators obtained: Total salaries of "cultural producers" Gender distribution of "cultural producers" Regional (County) distribution of the number of "cultural producers "

What to measure?

The commission assigned to the Agency required the development of the following indicators:

- Number of enterprises
- Number employees
- Size of total value-added of all "creative" industries'

Other indicators can also be identified as interesting, for example, distribution by gender, educational background, proportion employed in creative occupations in relation to the proportion employed who regarded as supplying a support service to them.

In fact the UNESCO report states that total value-added in the identified sector as a proportion of total GDP from the production side is an appropriate measure of the sector's "contribution" to the economy as a whole.

Table 7 shows the number of persons employed in 2005 using the Trident model. The table should be regarded as an illustration of probable levels. From the table it can be seen that about 190 000 were employed in 2005 in what we refer to here as production of cultural values. More than 130 000 of these are employed in the cultural industries identified. The tables also show that amongst employees in "cultural occupations" there are more employees outside cultural industries than within these industries. In 2005 the number of employees was close to 4.2 million which means that about 4.6 percent were employed in the production of cultural value and 3.2 percent were employed in cultural industries.

Table 7 Estimate of employees in cultural industries and cultural occupations in Sweden 2005 as per the proposed definition*

The Trident Approach	Cultural industries	Other sectors	Total
Employees in cultural occupations	47 579	59 711	107 290
Employees in support services	84 900		
Total	132 479	59 711	192 190

*The Agency did not have access to SNI2007 when making these estimates.
Source SCB LOUISE register, employed as per the November definition

2.3 Regional work on cultural industries

In what way has the regional level worked with creative/cultural industries, and how have they tried to identify these industries in the statistics. At the national level there is no official definition, statistical framework, nor any agency/authority with responsibility for the "sector" of creative/cultural industries. However, at the regional level there is ongoing development work to promote regional growth in the best way. Here the "experience industry", creative/cultural industries and culture are important parts. Each region draws up a Regional Development Program (RUP). According to the Ordinance (2007:713) on regional growth, there should be an RUP for each county. The aim of RUP is that it should state how the region can promote good sustainable development from economic, environmental and social perspectives. The programmes should also contain a strategy on how their goals are to be achieved.

Regional and local programs and plans are steered at the overall national level by Government policy as reported in *En nationell strategi för regional konkurrenskraft, entreprenörskap och sysselsättning 2007–2013 (A national strategy for regional competitiveness, entrepreneurship and employment)*. At the European level there are European structural fund programmes which focus on concrete measures, and the new programme period 2007–2013 involves the whole country. EU funds and programs are part of the Community's European cooperation for supporting national strategies that aim at strengthening regional competitiveness, entrepreneurship and employment.

During the years 2007 and 2008 a cooperation project was carried out between the Swedish National Heritage Board, the National Archives, the Swedish Arts Council, Nutek, the Swedish Institute for Growth Policy Studies, and the Swedish Association of Local Authorities and Regions. The aim was to analyse regional development programmes and strategies from cultural and cultural heritage perspectives. The project KRUS, (Kultur i Regionala UtvecklingsStrategier) (Culture in Regional Development Strategies), has amongst other things studied how culture can be used more effectively as a resource for regional development and growth.³²

The documents studied were regional development programmes, regional growth programs (RTP), large regional structural fund programs, regional cultural and cultural environment programs, as well as other documents focusing on regional development and growth.

Based on the programmes studied and their strategies, the RTMP KRUS project drew the following conclusions:

- The term culture is seldom defined, but culture is generally regarded as a positive development factor.

³²Swedish Arts Council (2008).

- Cultural environment and cultural heritage may be said to be of importance for development and growth, whilst the cultural infrastructure in Fine Arts, museums and libraries is not emphasised as much.
- The role and value of culture in relation to sustainable growth is weakly defined.

Culture is often connected to other general terms in the current programmes such as:

- Attractiveness and a good living environments
- Creativity
- Entrepreneurship and running a business
- Democracy
- Diversity
- Public health

A general conclusion is that RUPs largely illustrate the role of culture and its potential for promoting regional growth, but often lack connections to more concrete strategies. But there is one exception. *Östergötland, Örebro, Västmanland, Uppsala, Sörmland* and *Södra Småland* are involved in the project *KRUT* (Creative Development). This project which was coordinated by *The Regional Development Council of Östsam*, received during 2008 structural funds from the EU to map in the first phase creative industries and disseminate knowledge between counties, and together with the business sector further develop the area.

The goal of the *KRUT* project is to create sustainable development in the creative sector and thereby strengthen the sector's position in society. In order to achieve this, the region's creative sector was mapped. Disseminating knowledge about the sector, establishing support, creating networks and in different ways providing better conditions for entrepreneurship were other methods used in the *KRUT* project.

The KNOWLEDGE Foundation's *FUNK* model which has been used for the experience industry, is also regarded as a functioning model in the *KRUT* project.³³

The National Rural Development Agency (Glesbygdverket) published its report Spring 2009 "Kultur kan göra skillnad (Culture can make a difference)". A number of examples are reported here on how individual municipalities are working with culture. The report is based on a large number of interviews and should be regarded as a contribution to mapping and analysing the importance of culture for the development of society and the promotion of entrepreneurship in rural and sparsely populated areas. According to the report from the Commission on Culture³⁴, culture can be given two definitions: Either culture as an artistic activity such as literature, arts, theatre, dance and film, or culture as a way of life, namely the anthropological concept of culture. GBV's report and mapping is based on a narrower definition which is also more clearly linked to cultural policy and cultural activities of public institutions. However, the authors point out from the perspective of local development and entrepreneurship, the term "culture" should be broadened to encompass the experience industry, tourism, entertainment and business life in general.

The report in its summary states that access to culture in rural and sparsely populated municipalities is both good and at the same time limited. A recurring comment in the interviews was how important it is for people to see the opportunities in their own settings and that the main resources are provided by local cultural workers, and the surrounding

³³ *KK Foundation (2006). FUNK in Swedish stands for the equivalent in English - research, education, industry and culture - and the idea is that these sectors work together to achieve maximal effect.*

³⁴ *Betänkande av Kulturutredningen (Report from the Commission on Culture) SOU 2009:16*

nature and cultural environments. It was also emphasised that persons returning home or moving to Sweden sometimes find it easier to see what is unique in a given local situation. And that the initiative in digital technology creates opportunities to disseminate culture and find new target groups. One example is direct broadcasts from the Metropolitan Opera in New York to "Bräcke Folkets hus" . Finally, the authors state that "The increasing linkages between culture and entrepreneurship referred to in many cultural policy contexts are already established in many of the smaller municipalities." ³⁵

Cooperation between authorities on a greater scale was initiated by the Government on 20 June 2007.³⁶ Some 20 authorities were asked to strengthen their cooperation to promote sustainable regional growth by working in agency groups focusing on different themes. The commission should be carried out in accordance with the priorities determined in the "National strategy for regional competitiveness, entrepreneurship and employment" 2007-2013³⁷. Cooperation covers i.a. the sub-group innovation and renewal, which includes the area of creative industries. In addition to working with regional dialogue, the working group or creative industries has chosen to map regional initiatives in the area.

A number of regions and municipalities have worked on mapping the creative sector, but also worked with support measures such as creating networks, stimulating entrepreneurship etc. The ambitions of the regions in the area are to some extent reflected in the regional development programmes, but to achieve the aim of a national overview of the area, better material is necessary. A survey questionnaire has been carried out. The idea is that regions will be able to make use of the questionnaire, partly as material for supporting a better dialogue between the state and the region, but also where regions working in the area can find out about what is taking place in other regions.

The following questions were sent out to cultural heads at regional levels (regional associations/county councils/autonomous bodies) and contact persons for the county administration boards for RTP.³⁸

1. Has your organisation defined the area "Creative industries" ? In which case – what areas are included ?
2. Does your organisation have any special measures involving:
 - Programmes/plans
 - Mapping
 - Networks
 - Development work, projects
3. In what way are measures financed (internal and external funds, for instance from the EU)?
4. Do you co-operate with other players, and if so which?
5. Do you need assistance or measures from national authorities, and if so, in what way and which ones ?

³⁵ *Glesbygdsverket (2009)*

³⁶ *(N2007/5727/RT)*

³⁷ *(N2006/11184/RUT)*

³⁸ *For further information on responses to the questionnaire, as well as the work of the authorities on themes concerning creative industries, see the web site of the Swedish Agency for Growth Policy Analysis www.tillvaxtverket.se*

From the responses to the questionnaire, it can be seen that not all regions have defined the area and the responses show that the definition covers a range of different activities. An example of a model given prominence in the report is that of the Regional Development Council of Östsmåland and the KRUT project which is also used by six other counties.³⁹. Östsmåland for some time has worked with the "creative sector" . In connection with a study published in 2006 on the Norrköping pilot study, the sector was defined on the basis of 21 sub-sectors which in their turn were grouped into four main sectors: tourism/recreation/sport, media/digital, art/design and cultural heritage/information. Appendix 1 contains a description of the work carried out by Östsmåland.

³⁹ *Swedish Arts Council (2009)*

3 Conclusion

A definition of cultural industries can be applied with the help of existing Swedish register statistics (with the shortcomings they have).

The proposal for a definition can be summarised as follows:

- The term "Cultural industries" should be used in preference to that of "Creative industries" .
- Cultural industries can be defined by using existing statistics
 - The focus is on the production of cultural products/services
 - Distribution and consumption are not included
- A Swedish definition
 - However, this can relatively easily be adapted to later harmonisation for international comparative purposes
- Indicators for production of cultural values in the whole economy can and should be made using the "trident" approach.

The starting point, however, has been the most recent revision of the industrial classification system as this has better disaggregation, particularly for the service sector. The disadvantage, however, is that development over time cannot be done without more detailed examination of how much information would be lost comparing the former classification system with the new one. We will return to this in connection with the reports from the tables to be produced for the second stage of the commission.

In this report we have provided a definition that can be used for the following purposes: 1) Estimating "cultural industries in the economy " (however not the same as cultural satellite accounts which is another way of estimating culture in the national accounts) 2) Regional distribution of cultural industries in the economy 3) Cultural industries by employees in these industries, and persons in cultural occupations outside these industries.

Of main interest in the measure of a specific industrial branch is its size in relation to other industrial branches. In particular, it is interesting to know if more resources are allocated to an identified sector over time. This also applies to cultural industries.

Measuring consumption of cultural values

Cultural values, such as "use value" are based on the consumption of cultural products/services. The definition put forward, however, is based purely on a producer's perspective. The reason is that these register-based statistics are more extensive. Today's consumption surveys are sample surveys where opportunities for regional disaggregation are limited.

Today there are three types of studies focusing on the individual consumer. One is the study into cultural habits which surveys how many times a certain culturally related activity has been carried out. The question was put how many times respondents had been to the theatre, cinema etc. Here we receive information on the categorisation of the number of cultural activities, on average, and for different types of individuals.

Another way of measuring this is via time user studies where a sample of individuals keep a logbook and record what they do hour by hour during the day in relation to specific

activities. From this, the average time individuals spend on specific cultural activities can be calculated.

A third type of study delivering data for cultural statistics is the survey on Household Expenditure. Here we ask about size of spending on TVs, broadband services, theatre visits, and other activities regarded as culturally related.

From the perspective of producers of "cultural product values", there is a lack of essential information on the scope of the role played by "cultural product values" in different activities or products. What concerts are attended, how much time is spent watching TV, reasons for visiting Skansen (in order to re-experience "earlier times" = cultural product values) and how important Skansen is for visiting Stockholm. The problem of delimitation is not confined to services, but also applies to products. For example, is it possible to separate the various technical functions of "trousers " (traditional functional value) with the aesthetic function of "trousers that have the right look" (cultural product value)?

If further information is desired on how large these values are in relation to the purely technical functional values for the consumer, then consumer surveys must be further developed.

Cultural value and growth

No attention has been devoted in the report to the question of cultural industries and their contribution to growth. We will take this up in greater detail when we can also relate it to illustrations based on existing statistics in the second part of the assignment.

The core products in what we refer to as cultural industries are thus cultural value. If cultural industries are growth industries in the sense that they have higher overall growth in the service sector or the economy as a whole is not easily determined. The ITPS report *Kreativ tillväxt (Creative Growth)* pointed out that industries included in the categories used for "creative industries" grew at a lower rate than the service sector as a whole in terms of number of employees and value-added. In the UK where the opposite has been demonstrated, IT and marketing services have, however, been included and this dominates both changes in employment and income. In other words the selection of activities to be included has an impact on growth indicators.

One example of the difficulty of determining the contribution to growth is "drawing power " often related to cultural values, and the difficulty of linking this to producers of cultural values. Hultsfred Festival is a popular rock festival attracting thousands of visitors each year. If the definition proposed here is used, economic development can be seen in regional terms (other things being equal) if the Association Rockparty is growing economically and in terms of employment. But if the festival makes a loss, restaurants and camping sites may have made more money than usual as a result of visits created by the festival.⁴⁰ Developing and improving relevant measures of outcomes which can encompass "cultural values" in a larger complex is thus important. The Agency has started its work in this area.⁴¹

⁴⁰ *The problem of measuring the effects of regional attractiveness also exists in more tourist related public investments.*

⁴¹ Junkka F (2009) Regionala turismräkenskaper. A Study of the opportunities for estimating rural tourist satellite accounts in Sweden (stencil), the Swedish Agency for Growth Policy Analysis

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