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Mapping of the cultural and creative industries in Montenegro was part of the activities of the project 'Cultural and Creative Industries as a Sustainable Economic Sector in Montenegro', supported by the UNESCO International Fund for Cultural Diversity, implemented by the Institute for Entrepreneurship and Economic Development (IPER). The aim of the project was to support the development of the cultural and creative industries (CCI) in Montenegro through: mapping the CCI in Montenegro and identifying their potential to strengthen local and regional development, identifying and promoting successful entrepreneurship stories in the CCI to gather lessons learned and establish a general and strategic framework for their further development, encouraging the development of entrepreneurial skills in the sector and raising awareness of the CCI potential for social and economic development in Montenegro.

For the purposes of this research, when defining the CCI, we started from two major definitions: the UNESCO definition of the cultural and creative industries and the definitions of the creative industries of the DCMS - Department of Culture, Media and Sport, the United Kingdom which formed the basis for the development of the largest number of CCI methodologies. UNESCO defines the cultural and creative industries as 'an organized activity sector whose purpose is to produce or reproduce, promote, distribute and / or commercialize cultural goods, services or activities, of a cultural, artistic or heritage nature. According to the British Model (DCMS), the creative industries are 'industries that are based on individual creativity, skill and talent and which, by creating and using intellectual property, have the potential to create wealth and employment.' As the definitions do not provide a clear insight into the content of the cultural and creative industries, they are further defined by defining sectors and activities.

Through this project, for the first time, the creative industries have been identified through the mapping process. Based on the analysis of international experience in CCI mapping and consultation, 11 sectors have been identified as well as 40 activities related to CCI based on Classification of Activities 2010.

The cultural and creative industries in Montenegro are in a nascent phase but they are recognized as potential, aimed at generating income or profits and creating jobs, which contributes to sustainable development at local and national level. The assessment of the economic effects of the cultural and creative industries in Montenegro has led to the conclusion that the CCIs in Montenegro are below their potential and are lagging behind in comparison with other countries.

The results of the research showed that CCIs contribution in 2018 is reflected in the following parameters:

- 1.5% of gross value added (GVA) compared to the GVA of Montenegro,
- 3.5% of registered business entities (legal entities and entrepreneurs) in relation to the total number of business entities in Montenegro,
- 4.4% of employees engaged in cultural and creative occupations at the level of Montenegro,
- 3.2% of the total number of employees in business entities at the level of Montenegro,
- 1.4% of the total revenues of business entities at the level of Montenegro,
- 1.7% of total exports of services,
- 2.3% of total household expenditure on culture and related activities.

The mapping process and assessment of contributions have identified some weaknesses regarding monitoring of statistics by institutions, so it is necessary to work on their removal for the purpose of future monitoring and more accurate assessment. Also, the cultural and creative industries are most susceptible to change, influenced by the development of new technologies, changing their form and it is very difficult to classify because they are intertwined with other sectors. As the classifications do not represent a static category, the content of the CCI needs to be revised from time to time and adjusted for new developments. The limitations can be overcome by occasionally conducting specialized, methodologically well-designed research on the sample, where the extrapolation of the results obtained could characterize the sectors individually, but also the CCI as a whole.

Considering that the CCIs are not recognized as a single sector, there is no single institutional and strategic framework governing this area, but the responsibilities for design and development are divided according to which particular activities they belong to. The foregoing points to the need for cross-sectoral cooperation in the cultural and creative industries.

As part of the note when calculating the contribution of culture to the GDP of Montenegro, it is emphasized that it is necessary to improve the data at the national level and to classify activities at the four-digit classification level, bearing in mind that the statistics are available only on the two-digit level and that as such do not represent a precise basis to evaluate the contribution of culture. In this way, certain activities were not covered, which ultimately led to a possible underestimation of the sector's contribution. Also, in terms of employment, it was stated that it is necessary to improve statistics in order to ensure classification by the basic socio-economic characteristics of employees. Based on the analysis of documents and available statistics, an activity-based approach was selected. An activity-based approach allows for the measuring of economic effects of CCIs, such as employment and participation in GDP.

The activity-based approach has a limited reach because it leads in one part to an overestimation of the CCI contribution to employment, as it covers all employees in the CCIs activities, regardless of whether the employees are involved in the production of creative content, while on the other hand, it underestimates the number of employees involved in producing creative content outside of CCI.

In addition to the aforementioned approach, an occupational approach is used in mapping, in which the focus is on creative occupations rather than employment in sectors, as well as an approach based on a combination of industries and occupations.

The updating of the list of cultural and creative professions and activities should be continued in line with changes in classifications, as it was not possible at first to cover everything. In this regard, the contribution of institutions and individuals from the fields of cultural and creative industries is expected.

At this point, it is difficult to confirm which are the priorities at the level of the policy programs at the regional and national level. Namely, in 2020, priority policy measures were oriented towards the two thematic areas. The first one was **Product design and development** in the fields of: architecture, industrial design, fashion design, textile design, graphic design and preservation of old crafts. The second one was **Design and development of video games and Creating creative solutions**, with the goal to establish a Montenegrin cultural product in the form of a video game with strong export potential.

One cannot say that there is a mismatch between mapping results and selected policy priorities. The reason is simple: in Montenegro, everything is at an extremely low level when it comes to CCI development that every area has a basis to be supported.

I believe that the topics were chosen keeping in mind the need to strengthen the cultural identity of Montenegro, but also the potential for success in the market, especially in exports.

Unfortunately, successfully launched activities to support CCIs were stopped with political changes. Ministry of Culture as well as Ministry of Science were abolished in the new Government set up and policy focus was moved to different direction.

It is important to learn more about CCI in Montenegro

- to do a state of the art analysis of the sector
- to track the beneficiaries of the grant scheme
- to improve the statistical evidence currently available on MONSTAT