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A large circular graphic in the center of the cover contains a collage of images representing the creative economy: a person filming with a professional camera, a fashion model in a black dress, people in traditional costumes, and hands working on a red fabric. The background of the circle is a blue pattern of mathematical fractions and symbols.

CREATIVE ECONOMY

Report 2008

**The Challenge of Assessing the Creative Economy:
towards Informed Policy-making**



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This Report is the fruit of a collaborative effort that was led by UNCTAD and the UNDP Special Unit for South-South Cooperation and that included a team of experts from the collaborating UN agencies – UNCTAD, UNDP, UNESCO, WIPO and ITC – as well as international consultants.

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The English version of the full report and the French and Spanish versions of its overview section are currently available on the Internet at the addresses indicated below: <http://www.unctad.org/creative-economy> and http://ssc.undp.org/creative_economy



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A large circular graphic in the center of the cover contains a collage of images: a fashion show runway, people in traditional costumes, and hands working with a ruler. The background of the circle is filled with mathematical fractions. Overlaid on this circle is the title text.

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Foreword

The world economy has clearly seen an extraordinary expansion in the past five years. This expansion has been more broadly based than ever before, allowing many developing countries to benefit from it. Even some of the least developed countries have been able to generate average annual GDP growth of more than 5 per cent, representing significant progress over that made in the 1990s. Nevertheless, this path of economic growth has not yet been sufficient to ensure the welfare and decent living standards for the large majority of people in the developing world. Despite efforts to diversify their economies, 86 of 144 developing countries still depend on commodities for more than half their export earnings. Prevailing development strategies have yet to succeed in generating expected levels of socio-economic development for these countries. The challenge is to find feasible development options that take into account their specific realities and in particular their scarcity of skilled labour, lack of basic infrastructure and very low levels of foreign direct investment. How to promote development that is both sustainable and inclusive?

As economic models do not function in isolation, the time has come to go beyond economics and look for a more holistic development approach that considers their different cultural identities, economic aspirations, social disparities and technological disadvantages. Development strategies also must be updated in order to cope with the far-reaching cultural and technological shifts under way in our society. The world needs to adapt to this new environment by bringing issues relating to culture and technology into the mainstream of economic development thinking. Achieving the Millennium Development Goals calls for dealing with cross-cutting development issues by introducing concerted multidisciplinary policies and reinforcing policy coherence at the national and international levels.

Globalization and connectivity are new realities that have brought profound changes in lifestyles worldwide. This is reshaping the overall pattern of cultural production, consumption and trade in a world increasingly filled with images, sounds, texts and symbols. There is a clear need to better grasp the complex interactions among the economic, cultural, technological and social aspects guiding the dynamics of the world economy and the way people live in the twenty-first century. In this era of transformation, creativity and knowledge are fast becoming powerful means of fostering development gains.

In this context, the interface among creativity, culture, economics and technology, as expressed in the ability to create and circulate intellectual capital, has the potential to generate income, jobs and export earnings while at the same time promoting social inclusion, cultural diversity and human development. This is what the emerging creative economy has already begun to do as a leading component of economic growth, employment, trade, innovation and social cohesion in most advanced economies. The creative economy also seems to be a feasible option for developing countries. If effective public policies are in place, the creative economy generates cross-cutting linkages with the overall economy at macro and micro levels. It thus fosters a development dimension, offering new opportunities for developing countries to leapfrog into emerging high-growth areas of the world economy.

This study is the first to present the perspectives of the United Nations on this exciting new topic. The creative economy is an evolving concept centred on the dynamics of the creative industries. There is no single definition of the creative economy nor is there a consensus as to the set of knowledge-based economic activities on which the creative industries are based. There is no one-size-fits-all recipe but rather, flexible

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and strategic choices to be made by national governments in order to optimize the benefits of their creative economies for development.

At the heart of the creative economy lie the creative industries. Loosely defined, the creative industries are at the crossroads of the arts, culture, business and technology. In other words, they comprise the cycle of creation, production and distribution of goods and services that use intellectual capital as their primary input. Today's creative industries involve the interplay of traditional, technology-intensive and service-oriented subsectors. They range from folk art, festivals, music, books, paintings and performing arts to more technology-intensive subsectors such as the film industry, broadcasting, digital animation and video games, and more service-oriented fields such as architectural and advertising services. All these activities are intensive in creative skills and can generate income through trade and intellectual property rights.

This Report provides empirical evidence that the creative industries are among the most dynamic emerging sectors in world trade. Over the period 2000-2005, trade in creative goods and services increased at an unprecedented average annual rate of 8.7 per cent. World exports of creative products were valued at \$424.4 billion in 2005 as compared to \$227.5 billion in 1996, according to preliminary UNCTAD figures. Creative services in particular enjoyed rapid export growth – 8.8 per cent annually between 1996 and 2005. This positive trend occurred in all regions and groups of countries and is expected to continue into the next decade, assuming that the global demand for creative goods and services continues to rise.

It is clear that developed countries still dominate the global market for creative products. Nonetheless, many developing-country products are already benefiting from the creative

industry boom, particularly in Asia. Unfortunately, however, the large majority of developing countries are not yet able to harness their creative capacities for development. In Africa, for instance, despite the abundance of creative talents, the creative potential remains highly underutilized. The continent's share in global trade of creative products remains marginal at less than 1 per cent of world exports despite sharp increases. As is the case for other developing regions, this is a reflection of both domestic policy weaknesses and global systemic biases.

The policy-oriented analysis presented in this Report represents an initial contribution to developing a better understanding of the key issues underlying the creative economy and its development dimension. The Report addresses the challenge of assessing the creative economy with a view to informed policy-making by outlining the conceptual, institutional and policy framework in which this economy is flourishing. Given the multifaceted nature of the creative economy, strategic choices for concerted interministerial policy action are crucial. The important implications of multilateral processes in shaping policies for the creative economy also warrant consideration.

This Report is an example of cooperation inside the United Nations system, comprising contributions from five international organizations: UNCTAD, UNDP via its Special Unit for South-South Cooperation, UNESCO, WIPO and ITC. It is a joint endeavour that builds on complementarities in order to enhance the effectiveness of international cooperation and policy coherence in this innovative field. The creative economy is producing new opportunities for both developed and developing countries, but the challenges ahead should not be underestimated.



Supachai Panitchpakdi
Secretary-General
United Nations Conference on Trade and Development



Kemal Dervis
Administrator
United Nations Development Programme

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The Report was prepared under the leadership of UNCTAD and is a pioneering example of multi-agency cooperation reflecting the work of the United Nations Multi-Agency Informal Group on Creative Industries in an effort to build upon complementarities and enhance policy coherence on matters relating to the creative industries and the creative economy. It is the first report to present the United Nations system-wide perspective on this innovative topic and it brings together contributions from five collaborating bodies: the United Nations Conference on Trade and Development (UNCTAD), the United Nations Development Programme (UNDP) Special Unit for South-South Cooperation, the United Nations Educational, Scientific and Cultural Organization (UNESCO), the World Intellectual Property

Organization (WIPO) and the International Trade Centre (ITC).

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