ARTICLES

CREATIVE ECONOMY IN ECONOMIC DEVELOPMENT OF CROATIA

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UDK: 911.3:338:7 (497.5:100)

ABSTRACT
Creative economy in economic development of Croatia
Creative economy is one of the most propulsive sectors, which share in global economy as well as national ones continuously grows (Jones et al., 2016). Within the territory of 28 EU member states it participates with 4.5% of GDP and employs 3.8% of total workforce (https://ec.europa.eu/eurostat, 2017). Axis of creative economy development is made of cultural and creative industries that are generators of new technologies, innovation and media.

This paper analyses cultural and creative industry in the Republic of Croatia, as well as their role in economic and social development of the country. Cultural and creative industry (CCI) are directed towards highly educated workforce of tertiary education, digital society and 4.0 Globalisation. People employed in CCI in the Republic of Croatia are at the EU average with 3.6% of total workforce (2017) and with 50% of employed with tertiary education (https://ec.europa.eu/eurostat, 2017). CCI are important in expressing identity of the people but they are also an engine of economic growth (HKKI, 2015).

KEY WORDS
cultural industry, creative industry, creative economy, clusters, Croatia

1. Introduction

The term creative economy (Orange Economy) is relatively new one and it has been intensively considered in economic science for some twenty years (Flew, 2017). The economists (Pine and Gilmore, 1999, Mikić, 2008) have developed the term "Experience Economy" as the last phase in economic development of a society, from the economy of agricultural production, industrial production over the services economy to experience economy.

Modern consumer society is more inclined towards consumption of experience compared to classic consumption of traditional existential goods (Mikić, 2008). Creative economies consist of the three following elements (Howkins, 2003; Nairn and Gumbley, 2018):

a. Creativity as an idea that can be economic evaluated
b. Creative product that has its price and has originated as a result of creative work and
c. Creative industry that makes creative product.

Only the creativity that can be valorised in economy is a part of creative economy,which is made of 15 basic cultural industries (there are 12 of them in Croatia). Cultural and creative industries are a constituent part of creative economy, which definition is related with Holkheimer and Adorno's work Dialectic of Enlightenment (1944). The authors criticise modern cultural mass consumption and standardisation of culture. Cultural industry is the one that creates, produces and commercialise intangible cultural contents in consumption goods. Some of those contents are the oldest forms of creativity in human history (cultural heritage, visual arts) while the others have not appeared until the digital era (Newbigin, 2010).

The term creative industry has only existed in 1994 in Australia, in a document called Creative Nation, and explains *those industries that have its source in an individual creativity, capabilities and talent and that have potentials of wealth creation and employment through generation and use of intellectual property* (Primorac, 2012). Beattie (2000) emphasises the fact that creativity has been defined frommore than nine following different perspectives (Claxton et al.2011; Boix-Domènech and Rausell-Köster, 2018): cognitive, social-personality, psychometrical, psychodynamic, mystical, pragmatic, and/or commercial andbiological, and neuroscientific, computer, and systematic in newer post-modern approach.

Creativity is multidisciplinary and multidimensional category (Mikić, 2008) that functions in a quadrat - *Quadruple helix:* industry – academia – government – civil society. According to Pottsand Cunningham (2008) creative industry has developed over four possible models that have economic and technical-technological characteristics and have functioned more based on financial gain and profit rather than developing primordial creativity.

1. Through the Welfare model, creative industries are directed towards increase of income and profit. Thereby creativity is, after a certain period of time, converted into craft and industry that loses its creative character and becomes consumerism.
2. The Competition model equalises creative industry with every other branch of industry in community economy. Thereby it does not have special or higher effect on technological changes, innovation and productivity. It uses technological innovation of other industries on development of one's own ideas same as its innovation become a basis of other industries' production.
3. According to the Growth model, creative industries are engines of growth and their influence on economic development is caused by supply and demand ratio. Thereby creative industries become subject of trade independently on value and product quality. The quality becomes unimportant in sense of trade if it is not recognised and understood by consumer society. Quality, creativity and culture are trivialised to the extent that modern society accepts it.
4. In the Innovation model, creative industries are a part of economic evolution process and ensure services to innovation system through support of economic system changes (Potts and Cunningham 2008, Boix-Domènech and Rausell-Köster, 2018).

Table 1: Classification of creative industries.

Creative Industry	DCMS (2009) UK	Eurostat (2000)	KEA European affairs (2006)	UNCTAD (2010)	European Parliament (2016)
Press				+	
Publishing	+	+	+	+	+
Advertising and related services	+	+	+	+	+
Architecture and engineering	+	+	+	+	+
Arts and antiques market/trade	+			+	
Craft (artistic)	+	+	+	+	+
Design/specialised design services	+	+	+	+	+
Fashion design	+			+	+
Film and video industry	+	+	+	+	+
Music/sound recording industry	+	+	+	+	+
Performing arts (theatre, dance, opera, circus, festivals, live entertainment)	+	+	+	+	+

/ independent artists, writers, performers					
Photography	+	+	+	+	+
Radio and television (broadcasting)	+	+	+	+	+
Software, computer games and electronic publishing		+	+	+	+
Heritage and culture sites (libraries, archives, museums, historic sites, other institutions of culture and heritage		+	+	+	+
Interactive media		+	+		+
Other visual art (painting and sculpture)		+		+	+
Copyright			+		
Cultural tourism /recreation services			+	+	
Creative research and development				+	
Public relations and communications /translation and interpretation					

Source: Boix-Domènech and Rausell-Köster, 2018

In numerous CCI classifications (Table 1), three stood out as key ones. One of them is definition of the Government of the United Kingdom (British Department of Culture Media and Sports, DCMS, 2001) according to *which they are those industrieswhich have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. Creative industries are sign of natural evolution of cultural industry that follows structural changes caused by affirmation of new technologies and products in entertainment industry sphere.*

According to global definition proposed by UNCTAD (2008) *creative industry presents a cycle of creation, production and distribution of goods and services that uses creativity and intellectual capital as primary input comprised of a set of knowledge-based activities focused on art and potentially generates revenues. The term creative industry exceeds the limits of cultural sector and involves media and ICT sector.*

According to the newest definition of the EU Parliament (2016) the term creative industryis understood as an industry that is based on cultural values, cultural diversity, individual and/or collective creativity, skills and talent with the potential to generate innovation, wealth and jobs through the creation of social and economic value, in particular from intellectual property (European Parliament, Report 2016, 13/31). The values created by the culture also belong to elements of our behaviour and our perception of the world.

2. Cultural and creative industries in Croatia

In OECD countries cultural and creative industries are one of the leading economic sectors with the growth of up to 20% of GDP per year (Kisić, 2011). Until recently, cultural and creative industries were a privilege of highly developed countries whereas they are focused on application of ICT, innovation and free market play. Their role of innovators and catalysts for economic transformations has become increasingly important in European regional policy. That policy (Foray et. al, 2012) gives creative industries strategic roleto promote smart and sustainable growth in the EU regions and cities within the Europe 2020 Strategy (Boix-Domènech and Rausell-Köster, 2018). Therefore, cultural and creative industries are seen as the factors of tourism development, urban and spatial planning and economy as a whole.

The concept of cultural and creative industries has emerged since 1990s in Croatiaparallel to the entrepreneurship development (Mikić, 2008, Tonković, 2016). Its stronger action started in 2013 when Croatian Cluster of Cultural and Creative Industries was established compromised of 109 members acting under *Quadruple helix* model. The first step in cultural policy creation was mapping of the cultural and creative industries in 2015, and make of CCI strategies in 2018. Croatian cultural and creative industries were broken down into 12 subsectors with 45 activities (Rašić – Bakarić et al., 2015): Museums, libraries and heritage; Art; Music and performing arts; Film; Photography; Electronic media; Computer programmes, games and new media; Crafts (artistic and traditional); Architecture; Publishing Design; Advertising and market communications.

2.1. Museums

Museums are one of the most recognisable parts of cultural industry, although they are not for profit institutions in service of the society and its development, which are open to the public for purposes of study, education, procure, preserve, communication with the audience and to exhibit material evidence of people and their environment (www.icom.org). The number of museums and exhibitions has continuously increased in Croatia since 2000 (Figure 1), from 140 museums in 2000 to 222 in 2015, and from 734 to 1123 exhibitions (www.dzs.hr). However, not all the museums have the same meaning and visitors. Primarily, it depends on media coverage of some exhibitions, trend that prevails in social understanding, interest of the environment in which the museum is placed, availability of the location.

Museums that are in Adriatic Croatia have significantly more visitors from those in continental part of the country, primarily due to tourists who visit museums as part of city sightseeing.

Archaeological museum of Istria (and Arena in Pula), Museum of the City of Split (and Diocletian Palace basement), Dubrovnik Museum, and Natural History Museum Rijeka have recorded the highest number of visitors for years, while in continental part, but with lower number of visitors, Klovićevi dvori Gallery, Nikola Tesla Technical Museum, and Museum of Broken Relationships stand out (www.mdc.hr).

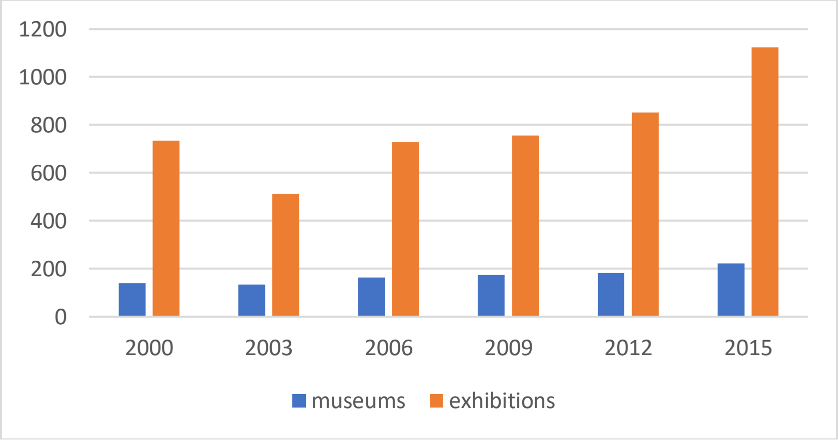

Figure 1: Number of museums and exhibitions in the Republic of Croatia, 2000 – 2015.

2.2. Theatre, film, television and gaming industry

The theatre has an important role in cultural promotion of certain area, preservation of artistic intangible heritage, and it presents artistic and creative meaning of nation or community. *The theatre is an institution, body or artistic organisation that prepares, organises and performs theatre productions regardless of social, legal, class or financial status (Batušić, 1991).*

Table 2: Number of theatres and cinemas for the period 2010 – 2017.

Year	Theatres	Cinemas
2010	44	118
2011	53	156
2012	60	162
2013	83	165
2014	93	159
2015	98	164
2016	91	156
2017	95	166

Source: www.dsz.hr

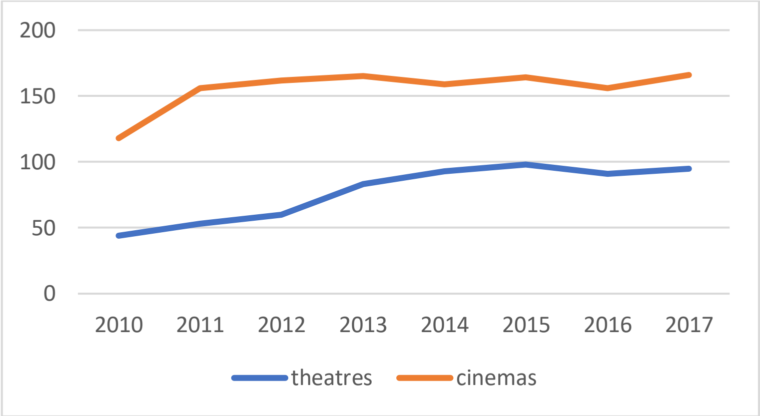

Figure 2: Ratio of the number of theatres and cinemas in the Republic of Croatia, 2010 – 2017.

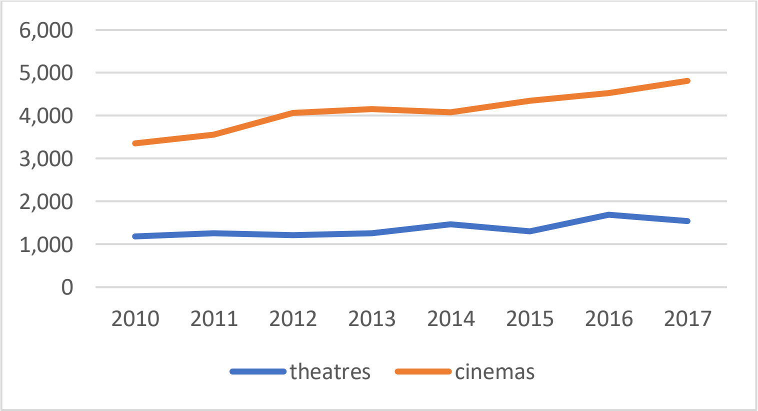

Figure 3: Number of theatre and cinema visitors, 2010 – 2017.

The number of cinemas is double the number of theatres (Table 2, Figure 2), and the number of visitors is almost four timeshigher (Figure 3). The theatre is an institution where domestic drama, ballet and opera productions predominate, and only sometimes there are foreign guest performances. On the contrary, Hollywood films predominate in cinemas while domestic ones are significantly less frequently shown.

This suggests that one's own culture and cultural production is not accepted from larger proportion of the population to which foreign blockbusters are imposed, and which accept foreign blockbusters, commercial productions that glorify fictional superheroes. Therefore, among the most-watched films in 2018 are just such films. Among 180 most-watched films there are no domestic ones (https://www.boxofficemojo.com/intl/croatia/yearly/?yr=2018&p=htm).

With regard to the quality of contents and mode of production there is a question how such production has real relationship with the culture and creativity, and how much it is only Fordist mass production, and even precise craft product aimed at commercialisation and consumerism. According to Box Office Majo Croatia statistics the most watched film in Croatia for 2018 was Bohemian Rhapsody, earning USD 1,139,853. Film Aquaman earned USD 872,210 while the other top three films had similar earnings; Avengers Infinity War USD 769,917, Venom USD 768,946 and Deadpool 2 earned USD 751,489. When it comes to domestic production the most watched films were Osmi povjerenik, Comic sans and F20. Domestic film is financed from multiple sources: national budget, by tendering procedure of Croatian Audio-visual Centre, coproduction funds such as Eurimages and Media, and county and local tenders (www.poslovni.hr).

Table 3: Number of domestic films made in Croatia from 2008 to 2018 (by film type).

Film type	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
animated	5	16	20	21	21	11	27	20	15	25	28
documentary	11	22	18	26	27	30	39	38	67	48	35
experimental	8	12	12	15	11	12	14	18	29	12	9
motion pictures	11	36	34	43	44	44	52	60	61	53	63

Source: www.havc.hr

Motion picture films have priority role in film production, but although they are outnumbered, these are not only feature films but mainly short films (Table 3). Radio and television industry have the highest influence on shaping attitudes and behaviour of an individual and a society, and entertainment, sensations, sales and profit, and even banality have become the main criteria in information selection. Media contents is reflection of media commercialisation (Stamenković, 2014). Radio is a medium that is commonly used for listening to music and receiving information, and listening to thematic programmes. Part of the day from 6.00 a.m. to 6.00 p.m.has the highest audience, while local topics have bigger significance than information at the national or global level, which also justifies existence of great number of local and regional radio stations. There are 153 radio broadcasters in the Republic of Croatia (https://www.aem.hr/radijski-nakladnici/).

The highest number of them is located in Zagreb (17 radio stations + HRT), and in other three macro-regional headquarters Rijeka – 5, Osijek – 5 and Split – 5. According to IPSOS research (2015) the most interesting topics for listeners are those focusing on health, human rights, sport and local politics, while the least interesting are those dealing with foreign policy, global economy and culture (IPSOS, 2015).

Television is an electronic medium that the largest part of the population, especially those over 55 years of age, use to obtain information. Younger population gives advantage to the internet. Significantly more than radio, television has an important educational role because, apart from number of social institutions and family, it affects conscience and identity of the people in society, especially among younger population (Torlak, 2013). IPSOS research have shown that average citizen believes television more than the Parliament, press, Trade unions, or political parties (IPSOS, 2013). According to individual broadcasters the advantage is given to NOVA TV over HTV1. However, the contents of our TV broadcasters often have more negative influence and from education standpoint they shift to obscurantism, illiteracy and banality. Perhaps the television has the most manipulative influence from all other media, since they affect shaping of our attitudes and understandings, and change of our beliefs. Natural disasters, conflicts and even wars are broadcasted live, and a TV viewer becomes passive actor, supporter all with the goal of sales and profits. There are 35 TV broadcasters in Croatia, out of which the largest number is located in the City of Zagreb area.

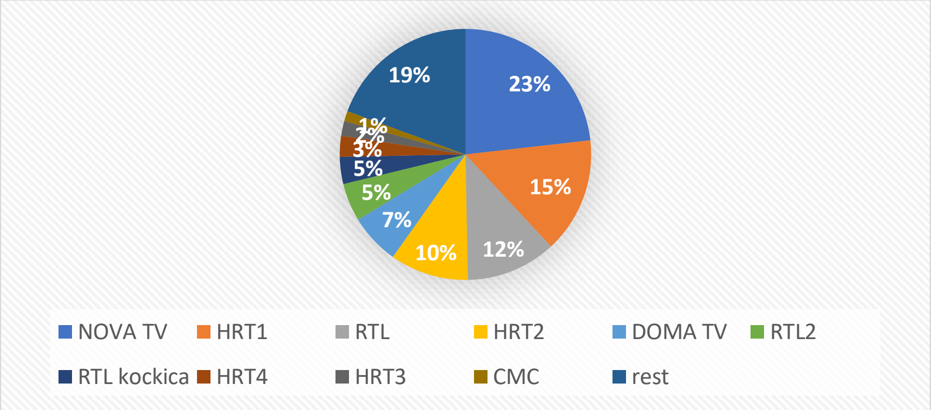

Figure 4: Ratings of domestic TV broadcasters in 2018.
Source: Agency for Electronic Media, 2019

Commercial broadcasters had the most watched programmes in 2018. The programmes that are focused on informative, documentary programmes, as well as culture TV programmes, such as HRT3 and HRT4 account only 5% of ratings (Figure 4). Analysis of certain programmes ratings has indicated low level of quality, education, and literacy of programmes, and trash programmes are the most watched ones. Majority of people were watching domestic and Turkish soap operas, reality shows and shows with overtaken licences (Agency for Electronic Media, 2019). The question arises whether such television can be considered as creative i.e. cultural industry or if it is only entertainment industry.

The industry that involves all structures of the society in every country in the world, and annually gains three times more profit than film industry is even more questionable one. There is neither need for production plants nor for storages, broadcasting spaces, or transport vehicles because everything is done in a small office, from home over a laptop or a PC. Gaming industry is one of the fastest growing activities that has expanded from creativity of an individual to global companies (Zackariasson, and Wilson, 2012). Games market has doubled its income from 2013 to 2019 (Table 4).

Table 4: Value of gaming market (in billions of USD).

Year	2013	2014	2015	2016	2017	2018	2019
Income (billions of USD)	75.5	81.5	91.5	99.6	109	137.8	152.1

Source: https://newzoo.com/key-numbers

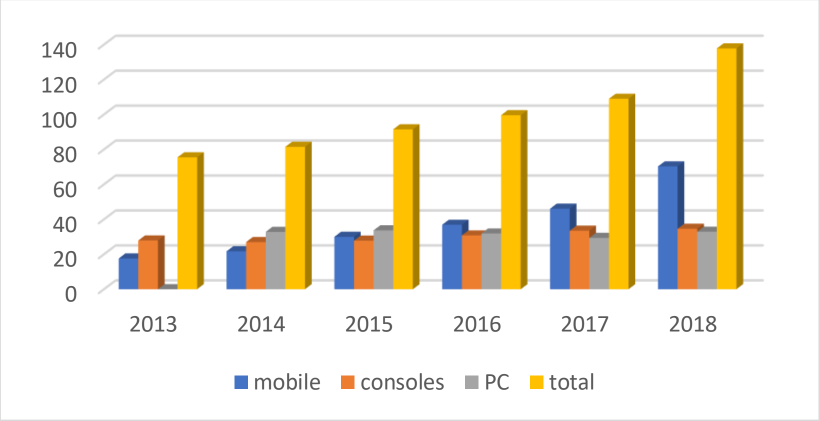

Figure 5: Global gaming market from 2013 to 2018 (in billions of USD).

Today, video games industry is valued in billions of USD, and has expanded from personal computers to smartphones (Figures 5 and 6), and covers all age groups of the population, more than 2 billion people on the Earth. Video games belong to audio-visual industry in which one or more players' interaction is taking place by playing on mobile phone, tablet, PC or console, and which through different actions, adventures or simulations encourage entertainment and fun.

Asia is a continent where video games generate almost half of their global income (48%), and Chinese and Japanese companies generate the highest incomes. The largest company is Tencent (China) whose revenues in 2018 were more than USD 19 billion.

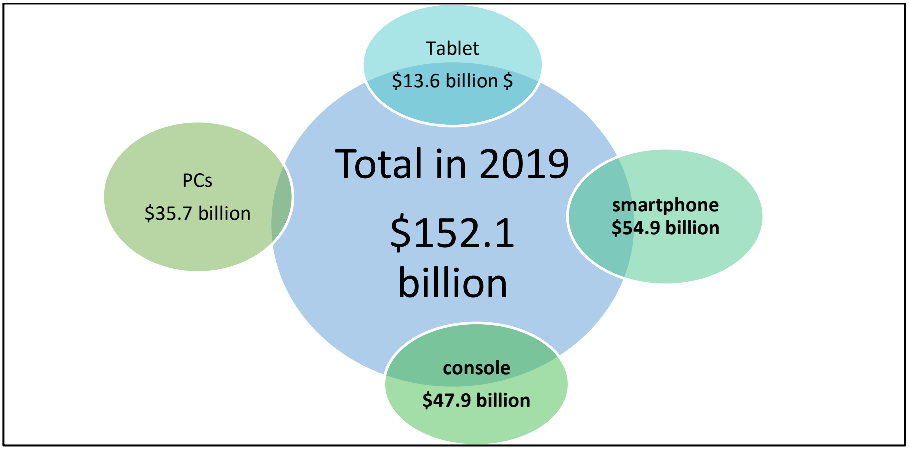

Figure 6: Global income on games in 2019 (according to use).

Japanese SONY achieved 41% growth and USD 14 billion in revenues (http://newzoo.com). There are five main developers in Croatia, with their headquarters in Zagreb. Among them Croateam is the biggest and the oldest game studio (https://www.gamedevmap.com/). Croatian gaming industry is more recognisable abroad than in Croatia, where it generates revenue of USD 200 million. Besides Zagreb, Novska has potentially become new centre of video games, where within business zone there is the first gaming industry incubator. Gaming industry, radio and television belong to digital industry that has experienced its momentum in the era of 4.0 industrial revolution.

3. Cultural and creative industries in regional development

Cultural and creative industries in Croatia are characterised by high level of innovation, predominance of permanent employment, but also a small market, problems with centralisation of culture in the capital, and influence of public funds. Part of the budget for culture has been decreased although state's budget has continuously increased. While that share was 6.16% in 2012 (Table 5), five years later it was decreased to 4.93%. Such negative trend is not only characteristics of the state level but also within regional level of authority, counties. In some counties budgetary resources have almost doubled (Karlovac, Koprivnica-Križevci, Split-Dalmatia), but not for culture. It is in these counties where allocations for culture have decreased more than 50%. Besides Primorje-Gorski Kotar and Dubrovnik-Neretva County the share of budgetary resources has been decreased in all other counties.

Table 5: Allocations for culture in county's budgets in 2012 and in 2017.

County	Total budget by counties				Part of the total budget (%)	
	Total		Allocated for culture			
	2012	2017	2012	2017	2012	2017
Republic of Croatia	22,009,427	29,845,455	1,355,808	1,472,270	6.16	4.93
Zagreb	1,312,232	1,819,623	58,710	57,734	4.47	3.17
Krapina–Zagorje	423,507	464,928	18,098	17,130	4.27	3.68
Sisak–Moslavina	708,557	1,282,960	40,281	40,208	5.68	3.13
Karlovac	506,269	1,023,265	26,623	30,224	5.26	2.95
Varaždin	562,752	701,606	35,800	32,487	6.36	4.63
Koprivnica–Križevci	511,562	959,226	20,685	18, 970	4.04	**1.98**
Bjelovar – Bilogora	373,552	434,066	19,227	16,143	5.15	3.72
Primorje–Gorski Kotar	2,182,872	2,107,557	143,285	172, 214	6.56	***8.17***
Lika - Senj	291,354	383, 066	14,137	16,728	4.85	4.37
Virovitica–Podravina	306,082	350,573	12,061	10,160	3.94	2.90
Požega-Slavonia	191,759	316,640	14,306	9,832	7.46	**3.11**
Brod–Posavina	437,900	557,327	19,656	21,330	4.49	3.83
Zadar	911, 606	1,085,611	40,684	51,039	4.46	4.70
Osijek–Baranja	1,130,590	1,258, 453	64,895	67,328	6.74	5.35
Šibenik - Knin	538,000	645,091	35,700	28,961	6.64	4.49
Vukovar–Srijem	591,022	1,402,878	29,559	33,170	5.00	**2.36**
Split –Dalmatia	2,115,286	4,364,839	131,933	139,313	6.24	**3.19**
Istaria	1,500,974	1,829,560	76,405	87,753	5.09	4.80
Dubrovnik–Neretva	660,721	790,253	70,844	102,298	10.72	***12.95***
Međimurje	349,407	744,278	18,668	25,002	5.34	3.36
City of Zagreb	6,403,423	7,323,655	464,251	494,246	7.25	6.75

Source: https://www.dsz.hr

The greatest reduction is in Koprivnica-Križevci County where out of total budget allocations for culture were 1.98% in 2017, while that share was 4.04% in 2012. Equally negative trend has been recorded in Požega-Slavonia County (decrease from 7.46% in 2012 to 3.11% in 2017), and Split-Dalmatia County (decrease from 6.14% in 2012 to 3.11% in 2017). An interesting example is Vukovar-Srijem County that has tripled its budget, while a share for culture has decreased more than two times, from 5,00 % in 2012 to 2.36% in 2017. Such policy has caused long-term adverse effects on cultural development of whole community and has brought growing dependency of cultural institutions on policy. Thereby, freedom of creation becomes a mean of policy and loses its identity.

Table 6: Share of employees in CCI in relation to total employment of population in the period 2012 – 2017.

	2012	**2017**
	% of total employees	
EU-28	3.8	3.8
Belgium	4.0	4.3
Bulgaria	2.6	2.7
Czech Republic	3.8	3.9
Denmark	4.7	4.3
Germany	4.3	4.0
Estonia	5.8	5.5
Ireland	3.5	3.5
Greece	3.5	3.2
Spain	3.1	3.6
France	3.3	3.5
Croatia	**3.7**	**3.5**
Italy	3.6	3.6
Cyprus	3.0	3.5
Latvia	3.6	4.0
Lithuania	3.7	3.7
Luxembourg	5.3	4.6
Hungary	3.7	3.3
Malta	3.9	4.7
Netherlands	4.5	4.5
Austria	4.0	4.1
Poland	3.2	3.5
Portugal	2.8	3.1
Romania	1.5	1.6
Slovenia	4.6	4.7
Slovakia	2.6	2.9
Finland	5.0	4.7
Sweden	4.8	4.8

UK	4.5	4.7
Iceland	5.4	5.8
Norway	4.6	3.9
Switzerland	4.9	4.7
Montenegro	3.6	3.6
North Macedonia	4.0	3.2
Turkey	2.1	2.3

Source: Eurostat, 2018

Table 7: Number of employees in legal entities according to form of ownership in 2017.

Number of employees	Total in Croatia	Arts, entertainment and recreation
Total	1,181,418	22,191
State	391,670	11,138
Private	741,708	9,812
Cooperative	1,642	-
Mixed	46,398	1,241

Source: www.dsz.hr, 2018

In 2017, 3.6% of people were employed in 12 subsectors of cultural and creative industries (57,500 in 2017), out of total employment in the Republic of Croatia, which is at par with average in the EU 28 (Table 6). State institutions such as museums, libraries, theatres, national radio and television networks employ 50.19% of employees in culture, while private sector, commercial televisions, private theatres and cinemas have 44.22% of employees (Table 7). Male population employment prevails in cultural activities, while female share is 45% (2017), same at both state and the EU level. According to level of education, 50% of employed are higher education graduates, which is almost double from Croatian average (28%), while only 2% of employees have or have not completed elementary school.

4. Conclusion

Despite the fact that these industries are the bearer of cultural progress, but also of economic development and obtaining of revenue, in one of its parts there is a danger of standardised activity, and there is a room for manipulation within the area belonging to media. The term art and artist have been replaced with the new term "cultural worker", who is employed in the culture. This way we have gotten a term, besides a worker in agriculture, factory worker, worker in education, worker in tourism that economises culture and creativity and converts it in purely gainful activity.

Painters, writers, actors, opera singers, musicians have become the workers in culture and their creative activity is treated not as an art but as a product that is realised in a certain period of time. As a part of the fourth industrial revolution, besides characteristic branches such as robotics, internet of things and services, smart factories and digital economy, there is also creative economy (Orange economy), which aim is to support growth and development of neoliberal market (Vuksanović, 2016). Creativity in economy is supported from the mass media, and market of culture converts the art into the capital (Vuksanović, 2016).

Neoliberalism converts creativity into standard and reduces it to a product of mass consumption. Creativity and culture are industrialised and have become highly profitable industrial activities, which sense is to create capital either cultural or communicational one. Today, creativity is a bearer of the profit not art, with which it loses the sense of freedom (Vuksanović, 2016).

Economisation of culture has become an ordinary way to observe the art in neoliberal economic society. Besides physical, geographical and socio-economic dimensions, geographic area also gets the third virtual dimension, created by people and artificial intelligence. Simultaneously these two factors participate in transformation of environment at both perceptive and physical level. As Great Wall of China has become tourist attraction that earns money, our Dubrovnik walls are primarily tourist brand that has gained profit and number of visitors. Cultural and historical heritage of Dubrovnik has become a scenery for globally popular series "Game of Thrones". Its art loses its meaning by comparison with commercial entertainment.

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