

**Culture &
Creativity**

EU-Eastern Partnership Programme



DEVELOPING CULTURAL AND CREATIVE INDUSTRIES IN BELARUS

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1. EXECUTIVE SUMMARY

The Cultural and Creative Industries (CCIs) have been recognised by the EU and integrated into its policy documents and programmes for more than a decade. This report provides a bird’s-eye view of the cultural and creative industries sector in the six countries of the EU-Eastern Partnership: Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine, but most importantly, it provides country-specific view on challenges and tailored recommendations for CCIs in Belarus.

Belarus’ main general opportunities include:	Belarus’ main general challenges include:
<ul style="list-style-type: none"> > The level of education and existence of skilled technical and IT workforce support the development of creative economy. > The political strategy to diversify and open Belarusian economy support IT investment and changes to the visa regime create new opportunities in tourism development. > Growing interest in and overall use of Belarusian language and culture. 	<ul style="list-style-type: none"> > Ongoing brain drain of skilled creative specialists weakens the country’s critical mass. > Unsupportive economic environment for cultural organisations and creative enterprises. > Lack of integration into global markets creates non-favourable context for CCIs and other industries development. > Limited public space and civil society involvement in public policy. > Remaining dominance of Russian contents, especially in media and television.

Specific Opportunities and Challenges

1. Recognising CCIs’ transversal character in Belarus

Opportunities	Challenges
<ul style="list-style-type: none"> > IT sector is one of the top priorities for the government, which creates good conditions for interaction with CCIs. > Emerging trends of reviving history, heritage and local production for tourism development facilitate business opportunities for CCIs. 	<ul style="list-style-type: none"> > The official cultural scene remains closely regulated by the state as a mean to promote ideology and national identity. > CCIs are not officially recognised or inscribed in the cultural policy framework. > Absence of a national audiovisual and film policy that focuses on developing skilled workforce and production resources. > There are no specific conditions to support CCIs within state’s entrepreneurship and IT development programmes. > Lack of system to collect data, analyse and monitor dynamics and impacts of CCIs.

2. Setting up participatory policies and platforms

Opportunities	Challenges
<ul style="list-style-type: none"> > Establishment of bottom-up initiative “Creative Belarus” to support the grass-root level development of creative industries in Belarus. > Strong and self-motivated independent CCl scene with international links. > Some active professional unions manage to appeal to young generations. > Call for cultural initiatives by the state targets joint work of multitude of stakeholders. 	<ul style="list-style-type: none"> > Weak collective organisation and collaboration practices within creative community. > Wide gap between institutionalised state-funded culture and independent cultural scene. > Lack of involvement of local communities in current cultural tourism initiatives being promoted in towns and regions.

3. Building on emerging creative hubs

Opportunities	Challenges
<ul style="list-style-type: none"> > Establishment of several creative hubs as bottom-up initiatives focusing on technology, business development, arts and creativity. 	<ul style="list-style-type: none"> > Access to available infrastructure for independent professionals is limited. > Strict regulations and overly complicated bureaucracy to open up and operate a cultural place. > Public cultural infrastructure lacks up-to-date equipment and management practices and articulation with creative community. > Emerging IT and business hubs lack full understanding for CCl potential.

4. Easing access to specific funding and support

Opportunities	Challenges
<ul style="list-style-type: none"> > Crowdfunding has experienced a remarkable surge providing an important alternative source of funding for small-scale CCl projects. > Emerging tendency for private sponsors to support culture and social innovation. > New legal framework for public-private partnerships (PPPs) is in preparation which would include cultural projects. > Investments in film production including upgrading the state-owned Belarusfilm studio and establishment of open funding competition. 	<ul style="list-style-type: none"> > State funding for culture lacks systematic competitive procedure, which would include the specific terms diverse CCl profiles. > Lack of incentives to encourage sponsorship and private investment in CCl. > Difficult access to alternative funding sources adapted to the specificity of the CCl. > Creative enterprises lack specific favourable legal framework. > Deficient copyright awareness and management. > Out-dated practices and structures in audiovisual sector lack strategic development framework or clear national policy. > Existing mass media legislation extended

to internet does not allow free market development for CCI.

- > Publishing market is state controlled and Russian language has the monopoly despite growing interest for Belarusian literature.

5. Improving creative entrepreneurial education and skills

Opportunities	Challenges
<ul style="list-style-type: none"> > Success of grassroots initiatives for informal alternative education and training offer. 	<ul style="list-style-type: none"> > Promotion of creativity and entrepreneurship are missing from education and training offer on all levels. > There is lack of strategic and management skills among CCI professionals in public and NGO sector hindering their organisational and business development. > Absence of education and training offer in new disciplines and profiles linked with cultural tourism, audiovisual sector and management in CCI.

6. Developing audiences and markets

Opportunities	Challenges
<ul style="list-style-type: none"> > Increasing use of public space for cultural and creative events. > Crowdfunding platforms' success reveals interest of audiences to engage and support culture and social initiatives. 	<ul style="list-style-type: none"> > Weak communication and marketing strategies and practices of cultural and creative projects and institutions.

7. Encouraging internationalisation and cooperation

Opportunities	Challenges
<ul style="list-style-type: none"> > Recognition and interest from international community towards Belarusian artistic and creative scene gives incentive to build image of the country based on its creative values. > Cross-border regional networks and programmes have been allowing Belarusian CCI operators to learn and collaborate with international partners. > New attitude towards positioning Belarus in international film co-productions. 	<ul style="list-style-type: none"> > Limited resources and long-term financial support to guarantee the presence on the international markets. > International co-productions and partnerships in the CCI sector are complicated, including film industry.

Recommendations for developing CClIs in Belarus

1. Policy-making, Participation and Platforms.

- > *Acknowledge the potential of CClIs at policy level*
- > *Promote dialogue and joint platforms across CClIs*
- > *Foster inter-sectorial collaborations, notably between IT and CClIs*

2. Infra-structure, Funding and Frameworks

- > *Promote synergies between IT and CClIs hubs*
- > *Foster evidence-based management*
- > *Create supportive environment for CClIs business development*

3. Skills, Audiences and Markets

- > *Promote creative and entrepreneurial skills across education system*
- > *Raise awareness about the potential of CClIs across society*

4. Internationalisation and Cooperation

- > *Increase and support exchanges and presence in international circuits*
- > *Promote Belarusian CClIs internationally*

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Cristina Farinha, Senior Expert (Portugal), author.

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2. CREATIVE INDUSTRIES IN THE EU

The cultural and creative industries (CCIs) have been recognised by the EU and integrated into its policy documents¹ and programmes for more than a decade. The creative economy, a wider sector that goes beyond traditional arts and culture disciplines and comprises a larger number of interconnected activities and sub-sectors has a potential that is being acknowledged by other international organisations such as the Council of Europe, different United Nations organisations² as well as by national, regional and local governments and institutions worldwide.

Prior to this the sector's capacity to generate non-market values had long been considered in terms of symbolic, non-material and educational input. More recently, there has been a growing understanding that the sector can impact the economy directly and indirectly by generating growth and jobs, stimulating innovation, and contributing to social and sustainable development.

Research and data collected worldwide support this assumption. In the EU, the core creative industries generated 558 billion Euros in value added to GDP - approximately 4.4% of total European GDP, according to data from 2011.³ These industries represent approx. 8.3 million full time equivalent jobs or 3.8% of the total European workforce. Statistics also show that most CCIs have a higher percentage of youth employment than in the rest of the economy, and the sector has proven very resilient compared to others during the 2008 economic and financial downturn in Europe. Global economic data for 2013⁴ shows Europe leads this sector and is becoming a catalyst for development. The CCIs generate 3% of world GDP (2,250 billion US Dollars in revenues) and provide 29.5 million jobs worldwide.

Despite this growing recognition, their development has been slowed down by the fact that the CCIs overlap diverse policy areas such as culture, education, economic and urban/regional development. In recent years, the debate about the role of CCIs in the EU has focused on following key issues:

- > *Mainstreaming CCIs into the EU strategic agenda to foster a holistic European wide ecosystem. CCIs remained largely absent and an untapped resource in the EU2020 strategy⁵. At a higher level, some EU institutions are recognising the role of culture in achieving the Sustainable Development Goals and efforts are being made to consider culture as a key driver in its response to the 2030 Agenda for Sustainable Development. The EU needs to further acknowledge and invest in CCIs and explore its potential to contribute to growth and employment; to become a catalyst for innovation; and a key element in global competition and soft power. Innovation,*

¹ Such as the Communication on promoting the cultural and creative sectors for growth and jobs in the EU (2012), the Communication on cultural heritage (2014) and the European Parliament Resolution on a coherent EU policy for cultural and creative industries (2016).

² UNESCO – United Nation Organisation for Education, Science and Culture; UNCTAD - United Nations Conference on Trade and Development; UNDP-United Nations Development Programme.

³ Tera Consultants (2014) The Economic Contribution of the Creative Industries to the EU in terms of GDP and Jobs.

⁴ Ernst & Young (2015) Cultural Times: The first global map of cultural and creative industries, CISAC- International Confederation of Authors and Composers Societies.

⁵ https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy_en

entrepreneurship and CClS have been officially ear-marked as cross-cutting topics⁶ in EU programmes such as Horizon 2020 research and innovation, COSME for SMEs (including Erasmus for Young Entrepreneurs), Start-up Europe, Erasmus+, INTERREG-Territorial Cooperation and the EU structural and cohesion funds.

- > **Integrating the competitive advantage of CClS into regional development “smart specialisation” strategies for regional promotion, innovation and social-economic development.** CClS have the capacity to interact with other activities that often give rise to agglomeration and clustering effects that tend to contribute to a high proportion of added value locally. Several EU regions have been channelling structural and cohesion funds to CClS, especially for mapping assets, resource mobilisation, strategic partnerships and clusters and improving the infrastructure and services.
- > **Recognising CClS strategic relevance for urban development policies, notably through the European Capitals of Culture (ECOCs) initiative.** Cities have always been suitable locations for artists and creatives to thrive. Emerging creative hubs, new hotspots where professionals create, meet, collaborate and showcase their work are becoming drivers for city regeneration, giving new functions to abandoned industrial areas or disused buildings, which attract parallel services and businesses. ECOC, the EU long-standing flagship initiative, has evolved from an international artistic and cultural programme into a more structural initiative, which engages cities to include cultural development and CClS into the strategy of their development policies. ECOCs bridge European cooperation and culture with innovation, tourism and urban planning stakeholders.
- > **Incorporating CClS into innovation and research and development (R&D) programmes.** The capacity of CClS to contribute to innovation processes has been only gradually recognised and supported. Since 2010 the Innovation Union (an EU2020 flagship initiative)⁷ has highlighted that innovation is increasingly driven by non-technological factors such as creativity, design, branding and new organisational processes. The initiative also noted that user-driven innovation processes and the role of CClS in establishing meaningful relations and connecting with audiences and citizens are important.
- > **Promoting spill-over effects in other industries and society.** CClS have a strategic position to bring about spill-over effects in other industries and fields, as they overlap art, science and technology. Cultural and creative skills can be valuable for other professional areas, CClS can provide content for ICT, impact tourism and be integrated into several stages of value chains, notably manufacturing and high-end industries. This catalytic potential is also a resource for social innovation, health care and social challenges, such as environmental issues. Breaking down silos and fostering cooperation among diverse policy areas are required to facilitate this cross-sectorial fertilisation as well as promoting clusters where different stakeholders can collaborate.
- > **Refining capacity to respond to new opportunities that digital technologies bring into CClS value chains.** The fast development of digital technologies is making the internet the main marketplace, thus contributing to the increasing complexity of

⁶ 2015 Council conclusions on 'Cultural and creative crossovers to stimulate innovation, economic sustainability and social inclusion'.

⁷ European Commission (2010) Communication on Europe2020 flagship initiative Innovation Union.

creative industries value chains. This means CClS need to constantly learn new skills and adapt their means of remuneration. ICT is also bringing new opportunities for CClS regarding business models and more direct forms of interaction with audiences based on co-creation and further user-engagement. The EU is monitoring the digital change in creative value chains to address all consequent market imbalances, build capacity and foster diversity of contents and expressions.

- > **Improving access to finance, notably through the EU's new CClS guarantee facility.** Access to diverse funding sources is a crucial barrier for CClS. The Creative Europe Programme (2014-20) earmarked €121 million to a financial mechanism acting as insurance to financial intermediaries (e.g. banks) offering loans to CClS initiatives. The financial intermediaries will be also provided training programmes to better understand the needs of CClS projects.
- > **Promoting cross-border networking and alliances of creative hubs and creative entrepreneurs** – The European Commission is supporting European Creative Hubs Network⁸ (ECHN) and Creative Tracks⁹. These pilots are building up communities by circulating information and promoting gatherings, peer-to-peer training programmes, mapping, matchmaking facilities and competitions, and offering a common stage for these support structures across the globe to share and learn from each other.
- > **Developing a qualitative and quantitative understanding of CClS impact – the Cultural and Creative Cities Monitor¹⁰.** The European Commission together with Eurostat – the EU statistics office – and its Member-States, as well as international organisations such as UNESCO and OECD, have been working on the improvement and international harmonisation of data collection and analysis of the contribution of CClS to economy and to overall society. There is a growing need to further invest in new ways of capturing CClS qualitative effects. Other information-gathering methods such as storytelling and interviews are being considered. In 2017 the European Commission and the Joint Research Centre launched the Culture and Creative Cities Monitor. This platform maps and monitors CClS assets in selected cities (currently 168) and measures their quantitative and qualitative value and impact in a systematic and comparable way. This tool is a step to support efforts to put culture at the heart of cities' development agendas and to develop new ways of analysing and producing evidence for CClS.
- > **Highlighting the role of CClS to EU external relations in opening up new markets and contributing to sustainable development and cultural diversity across the globe.** The EU Council has recently adopted conclusions that endorse the European Commission communication¹¹ on the new EU strategic approach to international cultural relations. Recognising the pioneering role of Europe in the CClS sector, it will contribute to creating a conducive environment for CClS to continue expanding creating growth and employment, support cultural production as driver for tourism and development, while opening up new channels of communication, intercultural dialogue and peace building.

3. MANDATE AND METHODOLOGY

⁸ <http://creativehubs.eu>

⁹ <http://www.creativetracks.org>

¹⁰ <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/>

¹¹ European Commission (2016) "Towards an EU Strategy for international cultural relations".

This report provides a bird's-eye view of the cultural and creative industries sector¹² in the six countries of the EU-Eastern Partnership: Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine, but most importantly, it provides country-specific view on challenges and tailored recommendations for Belarus' CClIs.

The mandate is to analyse the current state of CClIs in these countries, identify their main challenges and opportunities, to draw recommendations, set directions and further steps ahead. This approach intends to go beyond simply targeting policy-makers at national and the EU level. It is designed for all those interested and potentially intervening in the CClIs diverse ecosystem. The key target groups include: Policy-makers and authorities from the Eastern Partnership region at all levels – national, regional and local –, the EU and international counterparts; the various sector professionals from all disciplines and sub-sectors, their organisations, enterprises and institutions and all related stakeholders notably from education and business community that are connected with the CClIs development agenda.

Regarding the scope of CClIs used in this report, the term “cultural and creative industries” encompasses a diverse and dynamic spectrum of disciplines or sub-sectors that are different in each country. These disciplines are constantly evolving and interacting therefore it is not feasible to set strict definitions and define clear-cut concepts, however these references were used to guide the preparation of this report:

- a) *The starting point is the concept of cultural and creative sectors contained in the regulation¹³ establishing the Creative Europe Programme. It includes an extensive definition, that comprises all activities based on cultural values and/or artistic or other creative expressions, including, inter alia: architecture, archives, libraries and museums, artistic crafts, audiovisual (including cinema, videogames, multimedia and television), tangible and intangible culture heritage, design (including fashion design), music and literature, performing arts, publishing, radio and visual arts.*
- b) *Cultural and creative expression is specific to each country. In each of the six Eastern Partnership countries other related activities could be considered if they demonstrate potential, e.g. ICT, media, communication and advertising, fashion and luxury goods, gastronomy, wine production and cultural tourism.*
- c) *The report focuses mostly on how to promote and improve the conditions for the development of these disciplines, sub-sectors or activities within the CClIs, that are either scalable and/or able to generate income and become sustainable and contribute directly to economic growth and employment.*

The preparation process for the report was planned to last over six months period, from autumn 2016 to spring 2017. Fieldwork was based on intensive missions to the

¹² In addition, the EU-EaP Culture & Creativity Programme has commissioned national sub-sector reports for gathering further specific insights on cultural heritage, audiovisual/film, performing arts, and literature. Moreover, to have regional perspectives to CClIs development, there is an ongoing process of piloting a creative town/region in each of the 6 countries: Sisian (Armenia); Shamkir (Azerbaijan); Svetlogorsk (Belarus); Mtskheta-Mtianeti (Georgia); Orhei (Moldova); and Kosiv (Ukraine). Finally, the Programme has launched a cultural indicators development initiative, taking place in most of the EaP countries that will give an overview of CClIs cultural, economic and social contributions. More information: <http://www.culturepartnership.eu/>

¹³ Article 2, Chapter I of the Regulation (EU) No 1295/2013 of the European Parliament and of The Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020).

region's six capital cities (in Ukraine, Lviv was also included). In these field trips, interviews, meetings and discussions took place with main stakeholders, including policy-makers and creative professionals and organisations, individually and within group workshops. The mission also included visits to creative hubs, venues and institutions. Data collection and feedback was complemented by desk research on existing literature and references.

While the EaP countries have many common elements, these countries also have significant differences. These countries share many common challenges in developing their CCIs agendas and might benefit from common actions, but they might translate differently. This report identifies the main challenges and opportunities to develop CCIs in Ukraine. Many of the challenges are shared with several other countries (and regions) in other parts of the globe, including in other parts of Europe and the European Union. As CCIs are related to a new economy based on talent/human resources and creativity, the sector's development requires the creation of a whole new ecosystem. There are no ready-made solutions available.

For each challenge, the report proposes examples from the European Union countries. Some cases are long-lasting proven initiatives, others have just started and are yet to be fully evaluated. These examples¹⁴ from other countries intend to be inspirational, they give account of practices that can either be replicated with the necessary local adaptations and/or serve as starting point for EaP countries to investigate and from there develop their own distinct solutions. Recommendations for promoting the sector development are presented for a short-term perspective as well as for a mid-term perspective.

¹⁴ Examples were chosen according to what fitted best the challenges under analysis and based on literature as well on the expert's knowledge.

4. DEVELOPING CULTURAL AND CREATIVE INDUSTRIES – REGIONAL ANALYSIS AND DETAILED VIEW ON BELARUS

4.1 Brief analysis of the national context

Opportunities

- > *The level of education and existence of skilled technical and IT workforce support the development of creative economy.*

Overall quality of education provides skilled professionals for the cultural and creative sector and related areas, but also supports participation in cultural activities and consumption of CCIs products and services. The thriving IT outsourcing and game development industries able to compete successfully on international markets that also provide good basis for CCIs development in general.

- > *The political strategy to diversify and open Belarusian economy support IT investment and changes to the visa regime create new opportunities in tourism development.*

Visa rules are being eased in view of renewal of the image of the country, as there is a focus to create more open and attractive environment for international trade and tourism. Recently established visa free entry regime via Minsk International Airport for stays up to 5 days favours mobility into the country from citizens coming from 80 countries. Moreover, regimes of visa free entry have also been set up for short-term visits of cross-border natural and cultural heritage sites, by Polish-Belarusian border, such as Belovezhskaya Pushcha National Park, and the Recreation Park “Awgustow Canal” that extends until Grodno.

- > *Growing interest in and overall use of Belarusian language and culture.*

With the support of the efficient communication campaign Budzma Belarusami “Let’s Be Belarusians!” (started in 2008) that promoted the use of Belarusian language and its culture via diverse artistic and cultural events, the status of Belarusian language and culture has been increasingly growing. It started with a circle of like-minded individuals and cultural NGOs, and later included support also from state institutions, media and business.

Challenges

- > *Ongoing brain drain of skilled creative specialists weakens the country’s critical mass.*

The shrinking economy and employment brings about an intensified migration to foreign countries, especially for younger professionals. Among them, ICT and creative and culture professionals, highly qualified with connections and good opportunities in other countries decide to leave. This continuous outflow reduces internal talent pool and capacity to support CCIs development in Belarus.

- > *Unsupportive economic environment for cultural organisations and creative enterprises.*

Difficulties in Belarusian economy are seriously hindering new development and initiative. Government recently suspended the 2015 decree “On the prevention of social dependency” that obliged unemployed to pay a tax for not having a job. This law also had negative impact on artists and creative professionals as a State Commission designates their status dooming all those not officially recognised to fall into the category of “unemployed”.

- > *Lack of integration into global markets creates non-favourable context for CCI and other industries development.*

National creative economies can thrive only in relation with the world peers and overall economy. Yet in Belarus, business is still to a large extent depending on state machinery more than market relations. CCIs are lacking therefore an environment in which initiative and entrepreneurship are facilitated and promoted.

- > *Limited public space and civil society involvement in public policy.*

Public administration and policy-making lacks necessary transparency and accountancy procedures limit civil society dialogue and involvement in discussions and decision-making. Moreover, due to controlled media, public expression and debate is narrow due as well to prevailing self-censorship.

- > *Remaining dominance of Russian contents, especially in media and television.*

Russian contents still dominate information in media and television, while Belarusian products and contents are marginalised, without a level playing field for demonstration and competition with those of Russian origin.

4.2 Recognising CCIs' transversal character

The CCIs have a multiple and transversal character, that impacts economic and social development. This potential is still under-recognised in EaP countries – as well as in many other parts of the globe - at all levels, from policy makers and authorities, to society in general, including sector professionals themselves. This (proto) sector is hardly considered as an integral part of the economy partially due to weak existing evidence concerning its contribution to overall growth and quality of life. For many culture and economy represent two distinct fields without any interaction. Culture is still considered a luxury by many, an approach remaining from former Soviet tradition. It is seen as a sector with low productivity and need for resources.

It is also difficult to fully comprehend the concept of CCIs, because the sector is open and multiple, includes several different disciplines, activities and professions, that on their turn may interact and add value to many different other sectors and domains. This notion may even vary according to different regions, cultures or policies. This makes it difficult to communicate and acknowledge the nature of the sector.

Many cultural sector professionals within the sector have a hard time in identifying themselves with the CCIs agenda. Each discipline is distinct with autonomous histories and paths. Consequently, their differences are more often accepted and put forward than their common elements. Few recognise the advantages of integrating the CCIs umbrella concept that could facilitate the sector's coordination and interaction, but also allow them to speak with common voice and get more

visibility. Many cultural and creative professionals see this reformulation as a drift towards commercialisation of culture field that would explore its material output or profitability. They see this as a problematical shift as they fear the instrumentalisation of culture. According to Professor Pier Luigi Sacco¹⁵ this reaction reflects a pre-industrial culture 1.0 logic in which producers are remunerated not as part of a market transaction but rather as symbolic exchange of gifts between artist or cultural producer and patron – whether an individual or the state itself. In this context, production and access to culture is limited and conditioned by social and economic barriers.

Culture 3.0 concept by Pier Luigi Sacco (2011)¹⁶

Culture 1.0	Culture 2.0	Culture 3.0
<ul style="list-style-type: none"> • Based largely on patronage model • Typical of a pre-industrial economy • Culture is neither a proper economic sector of the economy nor it is accessible to the majority of potential audiences • Cultural production lives entirely on subsidies and could not survive otherwise 	<ul style="list-style-type: none"> • Cultural and Creative Industries, that produce economic value and are even profitable, but they represent a specific sector of the whole economy • Audiences expand significantly, whereas cultural production is still severely controlled by entrance barriers • Characterized by an explosion of the size of cultural markets 	<ul style="list-style-type: none"> • Characterized by innovations that not only cause an expansion of the demand possibilities, but mainly and expansion of the production ones • Transformation of audiences into practitioners (thereby defining a new, fuzzy and increasingly manifold notion of authorship and intellectual property)

Technological and economic development has gradually been modifying the sector’s foundations. Like many other countries, the EaP countries have witnessed the growth in jobs considered “creative” and in the increase of creative components in jobs previously considered “routine” or “mechanical”. This change has had a considerable impact on educational systems, social welfare and policy makers in working out how to develop and retain human capital. In most EaP countries the success of hi-tech outsourcing and the information technology industry has been more visible and scalable and therefore has had a bigger impact on policy makers and investors. Unfortunately the CCIs have mostly remained in the shadows of this technological boom.

The culture sector needs new, dynamic organisational or business models in this transition, even when profit is not the final goal or purpose. Pier Luigi Sacco recalls that the culture sector’s non-material output – in welfare, sustainability, innovation, local identity and social cohesion need to be given appropriate attention. However, the traditional culture sector often resists this change of logic. Even for many of the

¹⁵ “Culture 3.0: A new perspective for the EU 2014-2020 Structural Funds Programming”, April 2011, European Expert Network on Culture, Brussels.

¹⁶ Pier Luigi Sacco, 2011. “Culture 3.0: A new perspective for the EU 2014-2020 structural funds programming.” European Expert Network on Culture Paper, April 2011. <http://www.interarts.net/descargas/interarts2577.pdf>

sector's entrepreneurs and companies for whom profit making is consensual and one of the goals, e.g. music, audiovisual, media, ICT, design and architecture, CCIs are still a "strange" agenda, that they do not take as their own nor see benefits of belonging to.

The sector's different disciplines still mostly work in silos in a competitive and not very collaboratively. Collective organisation (meaning informal alliances and platforms, umbrella organisations and other sectorial associations) is still in an early phase or weak and professionals lack coordinated action and shared agendas. The sector lacks a joint voice that could advocate its role and lobby for its interests. Formerly prestigious and powerful trade unions of the Soviet era that spoke on behalf of different artistic and cultural disciplines and professions still function, but most of them seem not to respond to the sector's current needs and concerns, even though some have been reorganised in order to attract new generations. The current market economy brings new values and dynamics and a silo mentality does not allow most of these structures to open up and embrace them. The institutionalised cultural sector is fearful of losing its status and privileges and the atomised independent cultural and creative sector had a fast transition to market economy, which did not develop into stronger and collective structures. Therefore neither have recognised the role and full potential of CCIs as a unifying concept. The sector still concentrates on the "I" - individually focusing in pursuing projects in competitive manner - not on the more collaborative mode of the "We".

CCIs' transversal and cross-sectorial potential notably for economic growth and job creation is still not evident for many. There is a lack of data to back up the arguments and convince stakeholders. New methods to collect and measure both quantitative and qualitative data-sets are needed to give new insights into the potential impact of the sector that goes well beyond figures. The current new economic framework requires new indicators. The crossover character of CCIs that adds value to other sectors, its indirect and invisible impacts, calls for cross-sectorial and cross-disciplinary analysis that may shed new light onto this phenomenon. In most EaP countries the process of developing UNESCO Culture for Development Indicators (CDIS) is under way. Armenia, Azerbaijan, Georgia, and Ukraine have developed the CDIS with the support of the EU-EaP Culture and Creativity Programme - as well as Moldova.¹⁷ This framework is an excellent practice, that allows countries to establish basic indicators to map the place of culture in the economy and society and provides a baseline for discussion and policy development at a national and international level.

The transversal dimension of CCIs is difficult to address since it implies a radical change in the way national governments, regional or city councils and institutions are organised and how they function. The strict division into policy areas without common or coordinated actions or budgets is not the most efficient way to establish and implement successful policies in culture and creative industries. Current access and use of digital technology have blurred the distinction between producers and users. Production now incorporates user-driven inputs, so there is an equal need to develop schemes and communication that allow citizens to actively participate in policy-making.

¹⁷ In addition, in Moldova a recently study has also contributed to measure the CCI sector economic impact validating its potential. "Assisting Moldova's Competitiveness Champions: Selecting Two Further Industries", USAID Moldova, 2016.

A change of views and in practice is therefore needed in relation to research and innovation in order to recognise the sector's capacity to impact the economy. Innovation is currently seen merely as technologically-driven and within the context of production, there is a need to consider the potential of non-technological innovation. Artistic and cultural processes are also research-anchored, creating specific knowledge, which demands long-term investment. The sector has great potential for its capacity to engage and give expression to users/audiences, to change organisations, but also to manage and generate new value from knowledge. Research and technology might well develop new ideas and products, but cultural processes test, check and socialise new technology.

Launching specific CCIs policies to use their potential effectively are still at an early phase. Tourism acknowledges the distinctive role of culture but favours connections between the ministries of culture and economy and not with a broader CCIs perspective. CCIs policies are issued often by one stakeholder, mostly the Ministry of Culture, but this sector requires jointly designed and implemented programmes and tools that cover more policy areas. A wider perspective should be taken into consideration when designing CCIs policies, programmes and tools and more stakeholders should be involved and targeted.

In many EaP countries there are inter-ministerial working groups that discuss and divide CCIs roles. To be effective and gather adequate resources, different policy areas and respective budgets could be channelled to convey a joint national strategy for CCIs spanning the economy, enterprise, research, technology and innovation, education, regional and urban development. It may be useful to create specific and independent cross-ministerial task forces to coordinate and develop CCIs which also include the private sector/businesses and professionals (cultural institutions, NGOs and entrepreneurs). These task forces could ensure interaction and synergy. They could also represent the sector within the policy-making process, promote research and monitor and evaluate policies.

4.2.1 International examples

Centre of Excellence for CCIs in Germany

- > *The Centre of Excellence for Cultural and Creative Industries¹⁸ was created in 2007 by a decision of the German Parliament and resulting from a cross-ministry initiative, i.e.: The Federal Ministry for Economic Affairs and Energy and the Federal Government's Commissioner for Culture and Media. It functions as a Berlin-based intermediary, advocate and matchmaker that informs, supports and builds trust between policy makers and multipliers, CCIs, academia and other industries. It provides a broad range of services and expertise focused on CCIs professionalisation and capacity-building (notably promoting entrepreneurial skills), cooperation between CCIs and other sectors, research of relevant trends and developments and offering CCIs professionals a neutral platform for networking.*

For more examples, see Creative Industries Council¹⁹ (UK) and Brainport Eindhoven²⁰ (The Netherlands)

¹⁸ <http://kreativ-bund.de>

¹⁹ <https://www.gov.uk/government/groups/creative-industries-council>

²⁰ <http://www.brainport.nl/>

4.2.2 Opportunities in Belarus

- > *IT sector is one of the top priorities for the government, which creates good conditions for interaction with CCIs.*

During the last decade, the IT sector has received strong governmental support. The creation of Hi-Tech Park (HTP) in 2005 to support software industry allowed an up-to-date infrastructure with favourable business environment, including co-working space, incubator and IT academy. At the moment, more than 90% of production is for export. Hi-Tech Park resident-companies are allowed to get involved in new science-intensive activities. Any company engaged in IT and related industries can apply for residency and benefit from tax-incentives and other advantages. The HTP administration is in charge of defining the trends and policies of the national software industry development. This model provides a good testing ground for fruitful interactions with CCIs.

- > *Emerging trends of reviving history, heritage and local production for tourism development facilitate business opportunities for CCIs.*

These new dynamics are revealing potential for tourism attraction and consequent demand for associated products and services. It includes crafts, renovation of built heritage, creation of open air museums, development of agro-tourism, remaking of historical events in towns and regions - including Jewish blocked heritage, for instance. The diverse features of the city of Minsk are also starting to be (re)discovered and disseminated via alternative guided tours, notably its architecture from Soviet times. In parallel, some pilot projects are setting the way for mapping and developing CCIs policies in towns, such as the plan for Brest 2019 Fortress site development; the former COMUS project (Council of Europe) in 2015-2017 that took place in the town of Mstislav to edify a model of development using culture; and finally, the Creative Towns and Regions Initiative by EU-EaP Culture and Creativity Programme in Svetlogorsk²¹.

4.2.3 Challenges in Belarus

- > *The official cultural scene remains closely regulated by the state as a mean to promote ideology and national identity.*

State acts as gatekeeper, funder and producer of contents and events in arts and culture fields taking over ownership of venues, halls and studios as well as TV channels. Furthermore, public procedures lack necessary transparency and consultation with cultural stakeholders. Official cultural scene therefore is used as a mean to promote state ideology, while independent cultural operators need to obtain permits to be able to carry out their public activities with strict rules and regulations regarding programmes and contents.

- > *CCIs are not officially recognised or inscribed in the cultural policy framework.*

The new legal reform code on culture from 2016 provides for the establishment of a single mechanism for regulating culture. The code sets out the basis for cultural activities and regulates the following areas: the preservation and development of

²¹ The Final Report on Creative Towns and Regions Initiative in Svetlogorsk: <https://www.culturepartnership.eu/en/article/report-svetlogorsk>

cultural values, the protection of historical, cultural and archaeological heritage; libraries and museums; cinema; folk arts and crafts, amateur groups; cultural activities; and the promotion of culture. The term “creative” is used, but not necessarily linked to wide concept of CCIs nor promoting its potential to impact on the economy and society. Many cultural and creative disciplines are not considered eligible for state support and broad social presentation.

- > *Absence of a national audiovisual and film policy that focuses on developing skilled workforce and production resources.*

While there is a demand for Belarusian skilled film industry professionals and production facilities – as result of recent investment –, Belarus lacks a national policy focus for film industry that could help to strengthen necessary skills and management models. As a consequence, many qualified professionals opt to emigrate to the Russia or to rest of Europe in search for more fulfilling environment and opportunities.

- > *There are no specific conditions to support CCIs within state’s entrepreneurship and IT development programmes.*

Existing IT community as well as all public investments and incentives to promote IT industries development are not sufficiently connected with CCIs. There is a lack of awareness at both policy and professional level to promote interaction between IT and CCIs, including joint research and scaling projects on international markets.

- > *Lack of system to collect data, analyse and monitor dynamics and impacts of CCIs.*

There are very few datasets and statistical analysis of Belarusian CCIs sector. Many of CCIs disciplines are not acknowledged in the national statistics and economic classifications. This hinders an accurate sector diagnosis and impacts, crucial for gathering evidence for decision-makers to be convinced and act accordingly. Moreover, it prevents any international comparisons and consequent exchange and peer-to-peer learning.

4.3 Setting up participatory policies and platforms

The ecosystem approach of CCIs brings a larger step that is fundamental for EaP countries. That is bridging the gap between public authorities and citizens. The mutual lack of trust hinders the development of a civic and participatory culture. In order to allow CCIs to thrive and unleash its crossover potential, diverse stakeholders need to contribute and interact. All have a role to play in this shared responsibility agenda: State and regional/local authorities; businesses and private sector; and civil society.

Top-down one-sided state policy and action is insufficient to trigger innovation and creativity *per se*. Equally the sector’s common reaction “let us do our own business alone” is not enough either. While there are few good examples in the EaP countries, there is still a long way in order to build a participatory culture that is not simply based on one-off events. Participatory discussions and open consultation are essential but they should lead to concrete action plans and implementation (even if partial and/or dependent on further political negotiations). This approach includes policy discussions and formulation, but also its consequent shared implementation, monitoring and evaluation, preferably through effective public private partnerships (PPPs) that are not yet common or even regulated in this sector

in most countries. To nurture such a culture entails a long-term investment as it involves a change of mind-set and practice. It is about building up and upholding processes, much beyond their mere results.

New platforms and alliances are needed to open new channels among diverse stakeholders. Formal or informal, databases, web platforms or clusters, and joint structures are crucial to showcase, mediate and promote mutual acknowledgement and activate collaborations and linkages. These platforms may constitute the sector's collective and legitimate voice to represent and engage in dialogue with the authorities. The CCIs sector in EaP countries lacks these intermediary organisations bringing together state/public authorities, artists/creatives and citizens/users. Cluster initiatives for instance may gather all those that are or might be interested in this field, including education, training and research; urban planning and development authorities; to users and audiences.

It is essential for the CCIs sector to promote and network, to join forces and build partnerships for their field and for business development, and also to have a clearer voice and better political representation. Creative hubs play also an important role in community development. This is particularly relevant for EaP countries, where a lack of trust is still prevalent. National funding programmes that create networks and clusters and establish creative hubs could help develop a culture of active engagement and participation.

Mappings and public consultations at national, regional and local level should become standard practice by CCIs in order to identify resources as well as discuss and define policy-making initiatives. They can also run online consultations, working groups and public hearings. Mappings and participatory budgeting can be a good testing ground to activate civic participation. Participatory budgets, for instance, are being implemented throughout Europe at diverse political levels including in some EaP cities and it is an instrument that can contribute to activate citizenship, regional ownership, policy-making ownership and increase trust.

4.3.1 International examples

Norwegian Innovation Clusters²²

- > *In the early 2000s the Norwegian cluster programme was founded on the premises that enterprises that collaborate are more innovative, productive and competitive. This financial scheme encourages bottom up shared initiatives by co-funding their collaborations and undertakings. Annual open calls provide up to three years of support based on business plans. The cluster resources, potential for growth and position in the industry are just as important as whether the initiative is participatory, the leadership share a common interest and whether the cluster project has common ownership. It funds clusters on three levels of development: (1) emergent, (2) mature with a national market presence, and (3) mature with an international market presence.*

For more examples, see more: Participatory Budgeting Portugal²³ and Culture Map Valletta²⁴

²² <http://www.innovationclusters.no>

²³ <https://opp.gov.pt>

4.3.2 Opportunities in Belarus

- > *Establishment of bottom-up initiative “Creative Belarus” to support the grass-root level development of creative industries in Belarus.*

In 2017, following the work by Balki project as well as intensified initiatives by Belarusian and international stakeholders, the NGO “Creative Belarus”²⁵ was established with the aim to support the development of creative industries projects and awareness raising. The website also includes a map of creative spaces in Minsk.²⁶

- > *Strong and self-motivated independent CCl scene with international links.*

The independent cultural and creative scene is active and recognised in Europe and in some cases supported by international organisations, notably in areas such as visual and performing arts, publishing, photography, cultural journalism. Existing web platforms for community engagement, discussion and dissemination are sophisticated and popular.

- > *Some active professional unions manage to appeal to young generations.*

Despite complex collective association system inherited from Soviet times, some of these structures have managed to update their activities and appeal to young generations of cultural and creative professionals. It is the case of the Union of Belarusian Writers, that has an active programme, especially a school for young writers, but also organising events and meetings with writers.

- > *Call for cultural initiatives by the state targets joint work of multitude of stakeholders.*

The state issued a call for proposals in 2016 to support cultural initiatives for Belarus that addresses state bodies, cultural organisations and citizens to contribute to the development of culture in Belarus and the integration of the Belarusian culture in the global cultural space.

Local examples:

Vitebsk4me initiative.²⁷ *It is an interesting model of interaction between cultural initiatives and city authorities. It is an independent organisation based in the city of Vitebsk. One of the most active and well-known communities outside of Minsk, resulted from civic initiative that has engaged the city’s intellectual scene. It has an active web platform and it organises a number of events and activities, festivals, markets, concerts and educational programmes notably on heritage and cultural management.*

Minsk Urbanist Platform.²⁸ *Community of architects and urbanists from Minsk that discusses current urban issues of the city of Minsk, combined with participatory approaches on urban design and communication.*

²⁴ <https://www.culturemapmalta.com/>

²⁵ <http://creativebelarus.org/>

²⁶ <http://balkiproject.com/creativemap>

²⁷ <http://vitebsk4.me>

²⁸ <http://urbanist.by>

*Mova Nanova.*²⁹ Currently a NGO, it results of initiative dating to 2014 of a journalist and linguist to set up an informal and practical language course in Minsk to expand the everyday use of Belarusian. It was acclaimed and reproduced in 12 cities across the country and even abroad where Belarusian diaspora lives by volunteers. It proposes diverse parallel activities such as translation support and competitions as well as language clubs for youngsters.

4.3.3 Challenges in Belarus

- > *Weak collective organisation and collaboration practices within creative community.*

Professionals recognise that they are often mistrustful of one another and need to change from being competitors to work as partners. The system lacks interactions at the horizontal level among creative entrepreneurs and culture professionals. The sector is fragmented, there is a lack of leaders to coordinate and gather all diverse stakeholders. Additionally, channels of communication with authorities and policy-making as well as businesses are in large part absent.

- > *Wide gap between institutionalised state-funded culture and independent cultural scene.*

There is a perceived divide between official institutions and alternative operators that need to overcome rules and act under unsupportive conditions. The state does not sufficiently recognise the value of independent cultural sector. Right of assembly is limited, requiring constant permissions and bureaucracy for every performance/public initiative. Operators also refer to difficulties in access to state media.

- > *Lack of involvement of local communities in current cultural tourism initiatives being promoted in towns and regions.*

Centralised governance erects barriers for participation of local community in these development processes. Despite the fact that the field of culture heritage, notably processes of revitalisation of castles and fortresses – like in Brest and Nesvizh, would be relevant resource for civic involvement and benefit.

4.4 Building on emerging creative hubs

Several new IT and creative hotspots, or “creative hubs”, have been emerging throughout the EaP countries as well as in the rest of Europe in response to the current needs of the sector. It is still a recent phenomenon in some EaP countries and the majority of them are private initiatives with little or no support from public authorities. These hubs serve and showcase the dynamic entrepreneurial spirit of the creative and business communities following global trends.

Creative hubs have different shapes and set-ups. Most are physical spaces – but can also be digital platforms and virtual networks – and may incorporate co-working spaces, incubators or accelerators, fablabs or city labs, but above all they personify a new community. In many cities, they start to occupy abandoned buildings in the centre, in derelict spaces or in former/actual industrial sites and neighbourhoods. While inhabiting and gradually renovating them, they bring forgotten parts of towns

²⁹ <http://www.movananova.by>

back to life and contribute to land and urban development. These are places for working, meeting, learning and interacting; where knowledge is shared and transferred. Creative hubs assume different functions and offer various products and services: Work locations and offices; master classes and workshops; mentoring and coaching; business clubs; matching events, hackathons, etc. Above all, hubs facilitate project and business development and build communities.

These new work locations contribute to blurring lines between disciplines and hierarchies. While creative professionals come together to meet, discuss, create and perform across cultures, disciplines, languages and profiles, more attention is given to experimentation and methodology. Interaction in hubs stimulates artists and creative professionals used to focussing on their own individuality to associate and collaborate with the rest of the creative community and beyond. This interest in organising collectively is a matter of survival in this ever-changing competitive environment. Sharing know-how and resources within common spaces diminishes skill gaps. Creative hubs are new venues or organisations for the sector, as they are versatile and flexible places that experiment and interact. Public cultural institutions in EaP countries often do not provide favourable conditions for private operators to use their venues, their facilities are expensive to use/rent, thus their potential and facilities are under-used. This region is highly equipped with theatres, opera houses, museums, film studios but many of them are not facing the challenges that new opportunities pose.

Many hubs are ICT based or ICT dominant, but CCIs are also part of these ecosystems. Fewer hubs are orientated on art, or invest in projects that might not necessarily be profit making - but sustainable; other hubs have social entrepreneurship as a main focus, promoting projects and businesses that focus on cohesion and inclusiveness; and some hubs are labs that provide cities with solutions to their challenges.

In EaP countries most creative hubs have been established from the bottom-up, while in some European countries creative hubs came out of a top-down institutional initiative. The latter have led in many cases to brand new spaces that take a long time to populate. Many hubs may be vibrant and crowded, but they are also fragile. The maintenance bills are high and sustainability is hard to achieve; teams and activities are a constantly struggling to keep up; hub managers often lack all the necessary skills to deal with businesses in this specific sector; many miss connections to other similar hubs in the same city or country; to other regional stakeholders – schools, policy makers, investors, industry, and to international peers.

Creative hubs can make significant contributions to CCIs business development, community strengthening and urban renovation. Creative hubs can revitalise neighbourhoods and under-developed city quarters. It is a good investment to allow access to empty or non-used spaces and venues for CCIs. Free or low-costs rents and simplified procedures can support many new initiatives. Supporting teams and operations in the initial years and integrating them into wider city/region and sector development plans can provide an impetus towards their structural sustainability and take them to new heights. As new stakeholders, hubs can build on their achievements and social capital and become the basis for the development of potential Public-Private Partnerships (PPPs), which have yet to have a legal basis in some EaP countries

4.4.1 International examples

IncrediBOL!³⁰ (Italy)

- > *IncrediBOL! was born in 2010 as a city of Bologna pilot project, to provide tools to develop entrepreneurship in the CCl's. Today it is a well-established network with diverse partners and works across the Emilia-Romagna region. It started to issue annual public calls for creative entrepreneurs offering small cash contributions, space free of loans and advisory services, training and promotion. Proposals were matched with city locations - often closed or empty municipal spaces. Creativity has proven as a key factor to redevelop the city and contribute to its economic regeneration. As a result, recently a new "micro-requalification" programme was launched to redevelop public spaces through art and creative interventions.*

For more examples, see Subtopia³¹ (Sweden), Telliskivi Creative City³² (Estonia), Nova Iskra³³ (Serbia) and Poligon³⁴ (Slovenia)

4.4.2 Opportunities in Belarus

- > *Establishment of several creative hubs as bottom-up initiatives focusing on technology, business development, arts and creativity.*

Varied venues emerged as result of grassroots initiatives to serve as focal points for artistic, creative and business development as well as community-building. Many of them have been transforming low-cost unprofitable properties and abandoned city areas into highly valued assets that are regenerating urban space. The most paradigmatic case is Oktyabrskaya street, an industrial quarter now renewed into an attractive city area filled with cafes and arts and creative venues.

Local examples:

***Y Gallery.**³⁵ It encompasses a contemporary art gallery, a design shop, a café and restaurant and a publishing house. It has a vast experience of exhibition work and presenting Belarusian artists as well as developing cooperation with partners locally and internationally. It is a meeting point for artists and creatives alike and a host and initiator for projects such as workshops, curatorial labs.*

***Korpus 8.**³⁶ It originally started as a photo studio – studio 67 - in other locations in the city of Minsk. Now it is organising a community that makes possible for professionals to jointly develop and present their work. This creative hub located in a former factory hosts creative companies in the 2nd floor while the ground floor serves as public space with workshops, fashion atelier, exhibition hall, souvenir/design shop, and café.*

***Balki project.**³⁷ It started as a creative space that was both a co-working space and a new place for leisure, work and cultural communication. Gradually the audience became a community of people with similar views and interests and this is Balki's major asset. Currently it develops, launches and operates public spaces for creative*

³⁰ <http://www.incredibol.net/>

³¹ <http://www.subtopia.se/>

³² <http://telliskivi.eu>

³³ <http://novaiskra.com/>

³⁴ <http://www.poligon.si/>

³⁵ <http://ygallery.by>

³⁶ <http://korpus8.by>

³⁷ <http://balkiproject.com>

community in different locations.

Imaguru startup hub.³⁸ Imaguru is giving start to a new tradition of transferring knowledge from business to business in Belarus. Located in the centre of Minsk, it focuses on entrepreneurship, technology and innovation. They represent a new style of business attitude, when place and environment are becoming a catalyst for new ideas, knowledge and change in mindset. Facilities include high speed Internet, meeting rooms, kitchen, sports areas and design thinking laboratory for prototyping. It also provides an access to the network of worldwide successful investors and mentors. Education is one of its main missions. It targets start-ups and young entrepreneurs but also adults and children. Coding academy, design thinking, teen guru and Tech Minsk are some of its courses and workshops. Imaguru acts as national contact point for GEW Global Business Week and has been the national partner of the Creative Business Cup.

Tsekh.³⁹ Independent centre for contemporary visual arts and photography, it is the main promoter of the annual event “Month of Photography” and host for the World Press Photo exhibitions. Provides workshops and exchanges for professionals by bringing experts and artists from other countries, notably from the region including Ukraine, Latvia, Georgia. Among the first spaces that opened up in Oktyabrskaya street (revitalized part of former factory), it became an example for other venues and businesses to settle on this spot.

4.4.3 Challenges in Belarus

> *Access to available infrastructure for independent professionals is limited.*

Private venues are scarce and costly. The state acts as gatekeeper regarding access to public infrastructure, houses of culture and halls. Administrative and legal impediments often prevent access to state-owned cultural venues and heritage to independent players. As a result, many artists and creative professionals have difficulties in finding appropriate places to perform or present their work because they might not fit the official format.

> *Strict regulations and overly complicated bureaucracy to open up and operate a cultural place.*

Regulatory frameworks in place are strict and burdensome hindering any new proposals or innovations regarding the establishment and operation of artistic and creative venues.

> *Public cultural infrastructure lacks up-to-date equipment and management practices and articulation with creative community.*

Many public concert, cinema, theatre and exhibition halls are not capable of coping with technical requirements of contemporary productions in areas such as cinema, photography, music, visual and performing arts. Venues are not adapted to the needs of contemporary shows. Additionally, public infrastructure is missing an up-to-date evidence-based management that includes efficient planning and programming, fundraising, but also audiences development strategies.

³⁸ <https://imaguru.co>

³⁹ <http://cech.by> and <http://mfm.by>

> *Emerging IT and business hubs lack full understanding for CCI's potential.*

Many of the existing IT and business hubs are neither knowledgeable nor integrate CCI's projects and creative businesses into their communities. The potential for fruitful crossovers and collaborations has not yet been explored among the divided communities. Inadequate entry criteria or high cost rents prevent CCI's operators from integrating into these hubs and building up joint relations.

4.5 Easing access to specific funding and support

Many European countries recognise the challenge of the complicated access to finance for CCI's resulting from their specific nature and value.⁴⁰ The main obstacles are: the small size of most creative organisations, their predominantly intangible assets, their sources of revenue, their reliance on intellectual property rights as a driver for growth, their weak managerial skills and their lack of knowledge of and contacts in the business world.

European public business development services and private investors, from banks to business angels, are not familiar with CCI's operational and business models. CCI's do not qualify to loans for certain SME's funding programmes and schemes often because they lack guarantees. CCI's face similar problems in accessing finance in EaP countries. The difficult and limited access to finance, poor infrastructure, unfriendly legislation, weak incentives in developing a charitable culture, etc. mean they are not considered favourable business partners.

Public funding of independent culture (NGOs) needs greater clarity and better criteria in relation to the transparency of selection processes, regularity of support and sustainable development. State support for SMEs does not consider CCI's specific nature and therefore needs further diversification, especially in relation to accommodating their micro-dimension. Local operators have little access to international co-productions and partnerships, because they often lack sufficient matching funds and adequate regulatory framework by the state. There are currently no incentives or tax deductions for private donations and sponsorship to CCI's. Intellectual property rights (IPR) protection laws are often neglected due to a lack of awareness among professionals or monitoring agencies. Restrictive regulations for online and offline trade and export also hamper business internationally.

The fund-raising skill in most of the sector operators is weak, especially for international grants. CCI's need more information, contacts and networking to identify and test the right partners, as well as resources to invest in long-term planning requirements. Some alternative and interesting funding endeavours are being developed by entrepreneurs, e.g. crowdfunding platforms, but structural improvement is needed in public systems and legislation to ease access and diversify funding alternatives for the sector.

4.5.1 International examples

⁴⁰ The OMC working Group of EU member-states report "Towards more efficient financial ecosystems" has described this main issue and compiled a set of best practices.

PMV - Cultuurinvest⁴¹ and STARTS – Investment Fund for Cultural Enterprises⁴² (Belgium)

- > *Two regional funds promoted respectively, by the Flemish Government – PMV - Cultuurinvest; and by the Walloon Government – STARTS. Both schemes provide specialised loans and equity investments to the diverse phases of business development, accompanied by coaching and advice to enterprises (SMEs) as well as not for profit organisations in the CCI.*

For more examples, see AWS VINCI Vouchers in Creative Industry⁴³ (Austria) and National Lottery⁴⁴ (UK)

4.5.2 Opportunities in Belarus

- > *Crowdfunding has experienced a remarkable surge providing an important alternative source of funding for small-scale CCI projects.*

Since 2015, leading Belarusian crowdfunding platforms Talakosht, MaeSens, and Ulej became increasingly effective in supporting cultural and social projects, charities, and socially responsible businesses. Legislation has not yet developed extensive regulation for crowdfunding activities, which so far have been treated as donations, subject to the standard 13% income tax. These platforms are allowing small-scale CCI projects to access an alternative source of funding – due to very limited public funding to independent proposals – that simultaneously links producers and users more closely. Though impact of crowdfunding remains limited, as it has not yet reached the capacity to support large-scale projects, it may serve as complementary funding sources, while testing projects with their users.

Local examples:

Ulej and Talakosht are meant for collecting funds for any good purpose, but for now social and cultural fields as well as projects associated with national and cultural identity are the most popular. Talakosht⁴⁵ is part of a wider user-driven platform: Talaka. It is a non-profit organisation that specialises in networking and connecting people with creative ideas. One of the essential conditions for selecting projects is the social relevance of their goals.

Ulej⁴⁶, resident in Korpus8 creative hub, follows a pro-business orientation, collecting 12% commission on successful projects. It supports a wide range of initiatives, with a focus on originality and benefits to the public. Promoters can promote their projects for free and for those beginners, the platform offers crowdfunding training resources, support and feedback.

- > *Emerging tendency for private sponsors to support culture and social innovation.*

The success of crowdfunding platforms has also showed that citizens are ready to donate to culture and support creativity as well as social causes. In the last years,

⁴¹ <http://www.pmv.eu/nl/financiering-voor-ondernemers/leningen/cultuurinvest>

⁴² <http://www.start-invest.be>

⁴³ <https://www.aws.at/foerderungen-1/vinci-voucher-in-creative-industries/>

⁴⁴ <http://www.lottery.culture.gov.uk/>

⁴⁵ <https://www.talaka.by>

⁴⁶ <http://ulej.by>

some examples of corporate social responsibility from big companies, notably media and banks cooperating with fashion industry and photography have been emerging.

- > *New legal framework for public-private partnerships (PPPs) is in preparation which would include cultural projects.*

A new regulatory framework for PPPs which would include cultural projects is underway. This step would allow CCI operators to collaborate and share responsibilities alongside other private and public partners. Moreover, it also may make available additional shared resources for cultural projects.

- > *Investments in film production including upgrading the state-owned Belarusfilm studio and establishment of open funding competition.*

Since the amendment in 2012 of the Law on Cinema (2004), there have been investments in upgrading facilities and the capacity of the state studio Belarusfilm – that monopolises most of the national production – and an open competition for film production has been in operation.

4.5.3 Challenges in Belarus

- > *State funding for culture lacks systematic competitive procedure, which would include the specific terms diverse CCIs profiles.*

State funding in the cultural sector lacks systematic and a competitive format, which would be managed by an independent body mandated to issue public calls, select, distribute and monitor use of funds (e.g. Cultural Endowment or Arts Council). Furthermore, besides state cultural institutions and few acknowledged NGOs, new creative disciplines and entrepreneurial projects are not included.

- > *Lack of incentives to encourage sponsorship and private investment in CCIs.*

The field is seen as subsidy-dependent lacking overall awareness of its potential contribution to economic development, therefore CCIs are not attractive for investors. Moreover, there is a lack of tax benefits or legal conditions supportive of sponsorship. Private financial support is therefore not frequent, yet in kind contributions to events and other projects are becoming more common.

- > *Difficult access to alternative funding sources adapted to the specificity of the CCIs.*

High interest rates on loans and the absence of guarantees makes it a costly alternative for CCIs funding. There are some state loans for starting up SMEs, but the requirements are not really adapted for CCIs specifics and this possibility is not widely known or used among the sector professionals. Moreover, among investors and business angels, there is a general lack of expertise and experience to assess and support the sector.

- > *Creative enterprises lack specific favourable legal framework.*

Many creative enterprises in Belarus, due to their small size, are hindered by the costly and burdensome registration procedures and entry barriers; as well as complexity of tax and regulations systems. Moreover, in Belarus, strict restrictions

of market protection make their prospects uncertain, notably when considering any international exchanges and trade.

- > *Deficient copyright awareness and management.*

Existing legal frameworks are in line with EU standards, yet several copyright and other intellectual property rights constraints remain. Monitoring and information are lacking in the distribution of cultural products and services. Moreover, professionals lack awareness of their rights and ways to be duly remunerated, collective management lacks accountability.

- > *Out-dated practices and structures in audiovisual sector lack strategic development framework or clear national policy.*

Majority of production means are state-run and private cinemas are absent. The film market is underdeveloped and dominated by Russian production and distribution means in absence of a clear national policy for the promotion and development of this industry. Belarus acts as a service industry for the Russian market. Allegedly private Belarusian commercial productions with public funding produce for Russian market, which are later exported back to Belarus as Russian productions. As a consequence, there is general little interest for domestic production.

- > *Existing mass media legislation extended to internet does not allow free market development for CCI.*

Increased state control over information space and pressure on mass media is in force. In 2015 amendments to mass media law extended liability to Internet and ordered owners to keep track of site visitors. Anonymity is put into cause and there is blocked access to black-listed media outlets. In broadcasting, there is a mandatory package of TV programmes to be broadcasted by operators and service providers, including a great deal of Russian content. The shift in 2015 to digital broadcasting was non-transparent and did not allow the opening up the service to new providers. Independent media distribution is thus complex due to compulsory registration and constant interference in print media and internet resources, including for journalists collaborating with foreign media.

- > *Publishing market is state controlled and Russian language has the monopoly despite growing interest for Belarusian literature.*

The publishing market does not have a level playing field for competition: Belarusian publishers have less financial resources to deal with translations and to invest in marketing and distribution. Publishing is licensed and regulated by the state, business is subject to mandatory and burdensome registration that does not accompany the current rapid changes of the market. Moreover, online publications and distribution have contributed to increase interest for Belarusian authors and literature – as electronic media is less regulated leaving more space for initiative. However, it is difficult for new emerging names to be introduced in absence of a literary environment that would create competitiveness and lack of support.

4.6 Improving creative entrepreneurial education and skills

In view of the emergence of a new economic paradigm means educational and training institutions from schools to universities need to open up and connect more with regions and communities. Educational institutions need new approaches in

how to design and conduct academic and vocational education that is more practical, resilient and entrepreneurial. Embracing the approach of lifelong learning would offer this. Many universities in EaP countries are prestigious for their technical quality notably in film, performing arts and music. However technical or artistic skills are not enough for young professionals to thrive, develop projects and start enterprises in the global market. Moreover, creativity and innovation are now being recognised as essential skills in other professions. All levels of education therefore need to integrate culture and creativity into their courses and develop creative skills and thinking and cultural practice and participation from early childhood. Lifelong learning needs to be promoted and teaching standards improved for pre-school to higher education, formal and non-formal institutions.

CCIs have also been impacted by the growth in digital media, globalisation, cross-border and cross-cultural collaboration. This creates a need for strategic and relational skills that deal with working in plural and multi-layered markets. Creative professionals need strategic, management and communications skills. Strategic skills rationalise the ways projects, businesses and careers are conceived and managed. A professional today has to be a creator, a manager, a researcher, a public relations specialist and a polyglot. All creatives need skills in how to negotiate, lead and discuss ideas, objectives and plans with partners. The need for continuous training increase in this more demanding and competitive market. Professionals have to be permanently on top of their game otherwise they risk losing contracts, schedules, deadlines, contacts and partners. Time management is fundamental especially when joint research and reflection are needed for a project, which is under pressure to produce outputs. Professionals have to reinforce their communication skills to overcome the obstacles caused by a lack of time, trust and mutual knowledge in non-hierarchical, multilingual and multi-sectorial temporary teams.

There are several examples of alternative educational and training projects and initiatives in EaP countries that fill the gaps and respond to these new needs. They are run by NGOs and established educational and cultural institutions. The challenge consists of how to integrate these new learning methods into the educational and training systems' official mainstream offer and how to engage different stakeholders to take up active roles in this development.

4.6.1 International examples

Escalator - Creative Industry Kosice⁴⁷ (Slovakia)

- > *Escalator is an intensive programme of training and development of creativity, talent and professionalisation for those working in the creative field, individuals or enterprises/groups promoted by Creative Industry Kosice. Initially participants identify their needs and define their objectives through interviews with foreign mentors. This forms the basis of a "tailor-made" training and support programme of workshops, seminars, coaching, mentoring, business and strategic planning, research and development, study tours and pilot implementation.*

For more examples, see OTELO regional network of youth creative centres⁴⁸ (Austria), Creative Partnerships⁴⁹ (Lithuania), Royal College of Art Innovation⁵⁰

⁴⁷ <http://cike.sk/en/project/escalator>

⁴⁸ <http://www.otelo.or.at/>

4.6.2 Opportunities in Belarus

- > *Success of grassroots initiatives for informal alternative education and training offer.*

Some interesting civic initiatives of non-formal education have been emerging filling gaps in Belarusian education and training offer regarding topics such as humanities studies, history and contemporary arts and culture; but also regarding teaching and learning methods, proposing critical and creative thinking schemes in opposition with strict and hierarchical traditional model.

Local examples:

*Lyatuchi University (Flying University).*⁵² It is an informal education platform that organises open lectures and courses on humanities disciplines such as history, heritage, and design. It helps to develop critical thinking targeting an independent and open-minded community of young people.

*School of Art Leader.*⁵³ Promoted by Art Corporation, it is an international educational project for young theatre and cinema professionals from Belarus.

*ECLAB European College of Liberal Arts.*⁵⁴ ECLAB's main principle is "knowledge as a mindset, not a tool". It aims at a combination between professional and personal development, allowing individual choice of curricula under the framework of liberal arts education. It concentrates on areas such as social and political phenomena and processes and contemporary arts culture. Staff is academic, experts and professionals, many with experience and connections abroad.

4.6.3 Challenges in Belarus

- > *Promotion of creativity and entrepreneurship are missing from education and training offer on all levels.*

Top-down formal education system does not promote debate nor contemporary topics and discussions. Creativity, initiative-taking and innovation are not sufficiently valued nor promoted. Schools and academia are not connected with surrounding environment nor responding to its issues. International connections are few..

- > *There is lack of strategic and management skills among CCIs professionals in public and NGO sector hindering their organisational and business development.*

Strategic and managerial skills are almost absent in culture and creative disciplines curricula. The CCIs community, whether operating in public or NGO sector, is weakly skilled especially regarding the development of sustainable business models, fundraising, marketing and partnership development. Furthermore, public

⁴⁹ <http://www.kurybinespartnerystes.lt/>

⁵⁰ <https://www.rca.ac.uk/research-innovation/innovationrca/>

⁵¹ <https://www.ttu.ee/mektory-eng>

⁵² <http://fly-uni.org>

⁵³ <http://en.artcorporation.by/project/school/>

⁵⁴ <http://eclab.by>

administration lacks human resources policy promoting continuous training as well as transparent recruitment processes and rotation. Institutions remain often inward looking and are not open to collaboration with independent sector.

- > *Absence of education and training offer in new disciplines and profiles linked with cultural tourism, audiovisual sector and management in CCIs.*

New artistic and creative areas and disciplines, many emerging around ICT development, but also associated services and businesses require new education and training offers. In Belarus, several established profiles in the market are still missing in terms of education offer, notably in areas such heritage preservation, agro-tourism, museums management and communicators/guides, film director and producers, script writers.

4.7 Developing audiences and markets

CCIs' potential and transversal features are still little known by policy-makers and much of society in EaP countries. Many CCIs professionals are not the sector's best advocates. CCIs remain largely absent in media and public discourse except among niche audiences in capitals or big cities. Active and contemporary cultural venues and institutions are difficult to find in regions and rural areas, even on the outskirts of capitals and distribution systems are under-developed. Cultural houses/clubs (*dom kultyury*) across the country need more resources and consequently up-to-date cultural and creative content. Developing audiences and a demand for cultural content is also crucial. This requires increasing the number of distribution channels. The different markets within EaP countries and different regulations and languages make it difficult to internationalise and operate across borders.

The digital revolution is blurring the distinction between creators and consumers, since content can be distributed without mediators to target audiences. Cultural production and access to new content are two phases of the same process, according to Pier Luigi Sacco. In his culture 3.0 model participation becomes a generator of value as its economic and social effects can be larger than market mediated distribution. User engagement and participation demands a new economic and social environment and framework that requires trust and dialogue between different stakeholders.

Most cultural institutions and many creative enterprises and professionals need audience engagement, communication and marketing skills. Box office sales and communications tend not to be a priority for many traditional and established institutions because they target a cultivated and familiar elite that frequently attend events. For the independent scene, the lack of strategic and planning skills and a shortage of long-term investment contributes to poor communication strategies. Most independent creatives seem to have difficulties with self-promotion, branding and market positioning and rely on sales points or parallel commercial initiatives. The shortage of value chain intermediaries - managers, agents, producers and especially marketing experts, public relations officers and communication specialists has a significant negative effect on the sector's development because these professions have the expertise to select, target and disseminate content and develop user engagement.

The diversity of expressions and content in national media is another challenge. Television can play a crucial role in promoting CCIs and contribute to building recognition and awareness and thereby increasing demand. This powerful tool is not

being used to its full potential. In EaP countries there is a need to critique and a need for specialised journalists and media experts that can write about CCIs personalities, stories and successes. There are some interesting media platforms, that promote urban culture, festivals, lifestyle, cultural tourism, etc.

EaP countries are known for the diversity and quality of some of their festivals for films, music and theatre that take advantage of their geopolitical location to bridge East and West. These festivals have been important focal points for audience and business development and tourism attraction. Several of them keep a programme running all year round, and in some cases, develop initiatives that go beyond the capital cities, despite difficulties.

4.7.1 International examples

OSTV - Canal180⁵⁵ (Portugal)

- > *Open Source TV channel (OSTV) is entirely dedicated to culture, arts and creativity, combining TV and internet on the same platform. It broadcasts innovative content, created by a new generation of artists and producers, and develops cooperation projects with partners around the world.*

For more examples, see HELMET city library network⁵⁶ in Helsinki (Finland), Kinodvor City Cinema⁵⁷ in Ljubljana (Slovenia), Opgang youth audience-based theatre⁵⁸ (Denmark), Laznia Nowa Theatre & Cultural Centre⁵⁹ (Poland) and Science Gallery⁶⁰ (Ireland)

4.7.2 Opportunities in Belarus

- > *Increasing use of public space for cultural and creative events.*

Creative professionals are starting to make use of public spaces demonstrating the value of arts and culture to city urban regeneration, by revaluing city's architectonic and cultural heritage, but also more closely interacting with citizens and audiences. Interesting examples are: Freaky Summer Party festival in Minsk, an international event taking place in parks and other city open-air spaces proposes education and entertainment and it is a good practice in collaborating with city public administration; Vulica Brazil, a street-art festival promoted by the Brazilian Embassy in Minsk that has drawn attention and contributed to the renewal of Oktyabrskaya street.

- > *Crowdfunding platforms' success reveals interest of audiences to engage and support culture and social initiatives.*

The emergence and success of crowdfunding in Belarus demonstrate that audiences and users are ready and willing to participate and donate to arts, culture and social enterprises and projects. These platforms are effective tools to test ideas and identify projects that citizens deem worthy of supporting.

⁵⁵ <http://canal180.pt/en/>

⁵⁶ <http://www.helmet.fi/>

⁵⁷ <http://www.kinodvor.org/>

⁵⁸ <http://opgang2.dk/>

⁵⁹ <http://www.laznianowa.pl/>

⁶⁰ <https://dublin.sciencegallery.com/education>

Local example:

*Citydog*⁶¹ / City urban culture. It is an online media platform promoting urban culture, festivals and cultural agenda, lifestyle, tourism among young professionals and families.

Café Cultura Minsk.⁶² Café in the centre of Minsk, presents art in an informal setting and close to the audiences. It interacts with the diversity of people to whom visit and stay sometime in the café is normal yet would not be interested in attending or going to a cultural institution.

Partisan.⁶³ Magazine that explores and presents the most current, questionable, often controversial phenomena in Belarusian culture – art, literature, music, cinema, theatre.

4.7.3 Challenges in Belarus

- > *Weak communication and marketing strategies and practices of cultural and creative projects and institutions.*

There is an overall lack of awareness in Belarus regarding the creative industries, their activities, products and services. Entrepreneurs invest a lot of effort in product development itself, yet little in communication and marketing, thus they manage to reach out only to limited circle of people. Often this is due to lack of necessary training, knowledge in marketing and management and skills in attracting and engaging with audiences. This is the case also for most of cultural institutions and NGOs whose personnel do not hold the skills nor the financial resources to dedicate to put forward communication plans and audience development strategies.

4.8 Encouraging internationalisation and cooperation

EaP countries are gradually engaging in the international arena by using culture as a soft power ambassador that builds their distinctive identity. Many are initiating international tourism campaigns and using culture as a central element based on their rich cultural heritage. However, CCIs have not yet been integrated into economic and trade diplomacy in relation to export and investment campaigns. EaP countries could develop the potential of local creative talent and human resources and their contribution to the added value of the economy in new national promotional campaigns. The small market size of most of these countries makes internationalisation a necessary step so that CCIs can enlarge audiences and scale up their activities.

The opportunities for professional mobility and circulation are easing although conditions differ between EaP countries. There are no travel restrictions for EaP citizens to travel around the region. Five EaP countries demand no visas or invitations for entry to EU citizens. However, the citizens of three EaP countries are subject to restrictions when travelling to the EU. Moldova, Georgia and Ukraine have seen their visa requirements waived to the Schengen area. The on-going conflict in five EaP countries feeds instability that affects international exchange, trade and collaboration.

⁶¹ <http://citydog.by>

⁶² <http://cafecultura.by>

⁶³ <http://partisanmag.by>

All EaP countries participate in major international cultural organisations and have signed international cultural conventions, e.g. within the UNESCO framework. They are active partners in several Council of Europe and EU cross-border projects,⁶⁴ targeting cultural heritage, museums, film, crafts and publishing.

One of the region's biggest achievements is participation in the EU's Creative Europe Programme. Three EaP countries are now members and others are in the process of negotiation or considering membership. The benefits go beyond funding for different dimensions of cooperation in culture and media. The Programme gives EaP countries the opportunity to engage alongside with European peers in co-creation and co-productions. Developing partnerships is basic to most of Creative Europe strands project requirements. The programme funds formal and informal training and peer to peer learning activities for sector professionals that helps them stay in touch with potential international partners. The disadvantages are many operators in EaP countries need more international contacts and project management skills and most calls require 40-50% of co-funding which prevents many from getting involved.

Festivals in EaP countries promote the region and trigger the internationalisation of CCIs. Competitions, festival programmes, parallel showcases and talks all promote content and creatives at home and abroad and lead to local artists and producers participating in similar events abroad. Festivals host many foreign professionals, producers, directors and related businesses. Some export their concept to other cities abroad and organise "spin-offs". Many festivals also engage in international networks that feed continuous contact and access to opportunities for the region's professionals and organisations. Festivals in general are most prepared to engage and take advantage of the Creative Europe Programme.

The majority of EaP countries⁶⁵ are active in the Creative Business Cup (CBC), a global platform for innovative businesses based in Copenhagen. CBC is a year-round initiative that empowers entrepreneurs in creative industries and coordinates national competitions. Local contact points promote the national competitions and the winners then go on to compete in an international event. CBC members and participating entrepreneurs have the opportunity to develop their skills and build links with investors and global markets.

Operating in the international environment requires a specific set of skills as well as pool of material resources. Professionals recognise their lack of scale to cope with the vast dimension of the international market, thus their need to network, find partners, reflect together and disseminate information. This challenge calls for an upgrade in capacity building for the sector in developing long-term strategies, and increasing managerial skills such as fundraising and networking. Institutions need to include internationalisation in their policy priorities and implement programmes and tools that allow CCIs to work transnationally.

4.8.1 International examples

⁶⁴ "Kyiv Initiative"; Strengthening Creative Industries in Armenia, Azerbaijan and Georgia: Heritage Crafts – Common Platform for Development"; "The Book Platform"; "Black Sea Animation Programme"; "Let's Talk about Film in South Caucasus!", are some examples.

⁶⁵ Belarus, Georgia, Moldova and Ukraine

Go International⁶⁶ (Austria)

- > *This is an internationalisation initiative created in 2003 to support and brand Austrian businesses as reliable and interesting partners abroad. It supplies individual enterprises with the expertise, tools and opportunities to market their offer internationally. It is coordinated with other Austrian economic and trade agencies who provide additional direct financial support instruments.*

Tallinn Music Week⁶⁷ (Estonia)

- > *TMW started in 2009 as an initiative to internationalise the music industry through a conference and talent showcase festival. It has since then broadened its concept into an all-encompassing weeklong city festival, covering arts, design, technology, city space, food culture and various social issues. It is now a meeting point for European creative communities.*

For more examples, see:

Regional centres promoting CCI internationalisation - Catalan Institute for Cultural Enterprises⁶⁸, Flanders DC⁶⁹ and NOMEX Music Export Programme⁷⁰

European and international networks and platforms - Creative Business Cup⁷¹, Creative Tracks – Talents without frontiers⁷², European Creative Hubs Network⁷³, European Festivals Platform⁷⁴ and the Creative Europe Programme⁷⁵

4.8.2 Opportunities in Belarus

- > *Recognition and interest from international community towards Belarusian artistic and creative scene gives incentive to build image of the country based on its creative values.*

There is international interest and recognition of the work done in Belarus despite limited international exposure. Hence, the Nobel Prize award to Svetlana Alexievich in 2015, for instance, have put Belarus on a new level, making it “visible” in the international cultural arena. Belarusian theatre, visual and performing arts, photography, architecture, fashion and game design are some disciplines that have been managed to make it into the international scene.

- > *Cross-border regional networks and programmes have been allowing Belarusian CCI operators to learn and collaborate with international partners.*

Several international and cross-border programmes and networks have been supporting the connections of Belarusian operators with other peer colleagues from the region and across Europe, including peer-to-peer learning and joint projects,

⁶⁶ <https://www.go-international.at/>

⁶⁷ <https://tmw.ee>

⁶⁸ http://cultura.gencat.cat/ca/departament/estructura_i_adreces/organismes/icec/

⁶⁹ <http://www.flandersdc.be/nl/promotie>

⁷⁰ <http://nordicmusicexport.com>

⁷¹ <http://www.creativebusinesscup.com/>

⁷² <http://www.creativetracks.org/>

⁷³ <http://creativehubs.eu/>

⁷⁴ <http://www.effe.eu/>

⁷⁵ <https://ec.europa.eu/programmes/creative-europe/>

notably: the EU-EaP Culture and Creativity Programme; Tandem Europe from European Cultural Foundation; and participation in East European Performing Arts Platform (EEPAP).

- > *New attitude towards positioning Belarus in international film co-productions.*

Amendments in 2012 in the Law of Cinema (2004) led to the emergence of a new approach to international cooperation and co-production in film-making. Belarus is positioning itself as a more active player, though more as a service provider than a partner in its own merit in international market.

Local examples:

*Listapad International Film Festival.*⁷⁶ Promoted by ART Corporation, beyond the festival programme, it acts as a professional platform for international communication, contacts and sharing of experiences for Belarusian filmmakers. Well integrated into European networks and circuits, it proposes more recently also a national film contest for documentary, animation and fiction.

*BFW Belarus Fashion Week.*⁷⁷ International professional event created in 2010 aimed drawing public attention to Belarusian fashion brands and designers as well as creating favourable conditions to develop the industry as a whole – including design and mass market clothing, photography, cinema, journalism and art in general. Furthermore, it intends to promote Belarusian fashion potential and reputation on an international level and to attract interest of foreign colleagues and potential clients therefore it establishes links with other fashion weeks around the World and acts as a platform for business meetings and negotiation of multiple business-contracts.

4.8.3 Challenges in Belarus

- > *Limited resources and long-term financial support to guarantee the presence on the international markets.*

Though there is an expansion of international contacts – mostly on individual level –, the sector lacks a structured process of internationalisation and promotion for Belarusian CCIs. It lacks capacity to participate in international project partnerships and outlets. State or international organisations' support for the participation in international markets, festivals, missions or fairs abroad are irregular and not systematic, which prevents long-term planning and investment.

- > *International co-productions and partnerships in the CCIs sector are complicated, including film industry.*

The lack of adequate legislation that imposes administrative and tax burden alongside remaining ban on foreign funding makes participation in co-productions and partnerships very complex. Regarding film co-productions, despite a re-positioning of Belarus towards becoming a more active player in this international scene, the country is not a signatory of the European Convention on Cinematographic Co-productions and thus cannot be part of official co-productions.

⁷⁶ <http://listapad.com>

⁷⁷ <http://www.bfw.by>

5. RECOMMENDATIONS ON DEVELOPING CULTURAL AND CREATIVE INDUSTRIES IN BELARUS

5.1 Policy-making, Participation and Platforms.

- > **Acknowledge the potential of CCIs at policy level**
- > **Promote dialogue and joint platforms across CCIs**
- > **Foster inter-sectorial collaborations, notably between IT and CCIs**

5.1.1. Short term actions

a) Establish a CCIs informal professional platform.

The diverse sector professionals, including NGOs, enterprises and institutions, as well as freelancers, should organise within an informal common platform. This platform could develop around “Creative Belarus” initiative or include much wider circle of stakeholders. This joint enterprise would be a channel for mutual cooperation, joint debates, projects and interactions, showcase and promotion towards audiences and other stakeholders, and representation and advocacy, notably towards authorities.

b) Acknowledge CCIs’ wider role in society and economy and diversity of professional profiles in the CCIs.

The Ministry of Culture should acknowledge in its policy and regulatory documents a transition from narrow perception of culture as “folklore” or “high-arts” to a concept that encompasses a wide variety of disciplines, contributing to social and economic development. It includes the recognition of a larger variety of players and stakeholders (including institutions, NGOs, freelance professionals and businesses), alongside a more entrepreneurial orientated framework.

c) Conduct local cultural and creative resource mappings

Mapping exercises need to be conducted at city/regional level to identify existing infrastructure, venues, organisations, events, stakeholders and all other assets. This process allows clear understanding of existing and potential resources and constitutes a planning tool for the sector stakeholders and public authorities for further development of territories and communities, improvement of city/regions fabric and pushing local economies. These exercises can also promote community engagement and awareness, if conducted transparently and in collaboration with cultural professionals. Collected data should be mapped and showcased in interactive platforms. The maps could use the Creative Towns and Regions Initiative’s mapping exercise of the EU-Eastern Partnership Culture and Creativity Programme, which has published a handbook⁷⁸ on carrying out these mapping exercises.

d) Develop UNESCO Culture for Development Indicators Suit.

In order to start the establishment of a research and monitor system for CCIs dynamics and impacts, the government should launch a process to apply the

⁷⁸ <https://www.culturepartnership.eu/en/article/mapping-and-strategy-building-handbook>

UNESCO methodology of Culture for Development Indicators.⁷⁹ This tool is crucial to acknowledge the sector state of affairs, gather evidence for policy making and allow international comparison of datasets. The UNESCO CDIS has been conducted in all other Eastern Partnership countries.

5.1.2 Mid-term actions

a) Promote inter-sectorial collaborations through creation of CCIs cluster.

Following up the creation of CCIs joint informal platform, the sector should gradually relate and include further stakeholders such as academia, research centres and other business partners, especially among the IT community. A joint cluster can become a platform for wider cross-sectorial collaborations.

b) Promote interactions between CCIs and hi-tech and economic development policies.

The government should acknowledge the potential of CCIs to add value and distinctiveness into products, services and territory and promote interactions between IT structures and enterprises with CCIs, as well as integration of CCIs into SMEs promotion tools and tourism strategies. Articulated policy should promote matching of traditional industrial sector (like machine building, household appliances, furniture, etc.) with the IT and creative community.

c) Develop joint education, research and development programme for IT and CCIs linking academia and industry.

A joint programme to promote and support post-graduate education, research and development linking IT and CCIs should be set up to develop qualifications, allow the investment in innovation of processes and products and build up ties among academia and industry, but also between IT and CCIs.

d) Launch of process of development of a participatory CCIs national strategy.

The Ministry of Culture should start up the process of developing a CCIs national policy/strategy in which the role of the sector for cultural, social and economic development is recognised and fostered. This strategy should be conducted based on previous research and a process of consultation and articulation with the sector's professional community and other policy areas representatives, notably the economy, education and regional development.

e) Develop a specific audiovisual and media policy.

The audiovisual and media sector's capacity in terms of skills and production facilities should be accompanied by a national sub-sector policy that specifically orientates the development of this industry in Belarus. Potential synergies with IT sector developments should be fostered.

f) Facilitate the right to association and joint activities.

⁷⁹ <http://www.unesco.org/new/en/culture/themes/cultural-diversity/cultural-expressions/programmes/culture-for-development-indicators/>

Ensure legal provision for independent cultural and creative activity and development of associations and other joint organisations, based on principles of cultural rights and freedom.

5.2 Infrastructure, Funding and Frameworks

- > **Promote synergies between IT and CCIs hubs**
- > **Foster evidence-based management**
- > **Create supportive environment for CCIs business development**

5.2.1. Short-term actions

a) Promote joint programmes and collaborations among IT, business, creative and arts hubs.

Existing hubs should gather regularly, network and promote joint activities, like staff exchanges; peer to peer learning workshops; discussions and seminars; matchmaking events; mentorship sessions; hackathons and labs. This joint interaction contributes to further development of partnerships as well as cross-sectorial collaborations and advocacy.

b) Facilitate and support creative projects' access to venues and public spaces.

Creative hubs, artistic and cultural venues, festivals and events in public spaces are able to contribute to rehabilitate city neighbourhoods and disused areas by giving new functions and distinctive features and attracting alongside parallel services and businesses. Allowances based on project proposals and/or public tenders should be given to small-scale independent initiatives, especially when they manage to co-fund, to ease and support access of CCIs professionals to spaces, whether public (e.g. within cultural institutions) or when disused. Creative hubs, artistic and cultural venues that have proven dynamics and management capacities should also benefit from the process. It will have a positive effect on city-level regeneration initiatives.

c) Create incentives to encourage private sponsorship and investment in CCIs.

Tax incentives/deductions included within an adequate legal framework should be designed to give benefits to sponsors and other investors supporting the CCIs field. These incentives are crucial to make the sector more attractive, especially for companies' corporate social responsibility. It should be accompanied with information campaign for CCIs special features and processes as well as potential so to raise awareness of the financial and business community for the sector specificity. The state should also mediate and facilitate guarantees for investors and private sector – banking, business angels, and venture capital.

5.2.2 Mid-term actions

a) Establish an arms-length competitive funding system.

A new relationship ought to be developed between state and the sector, that structures and puts in place a transparent and systematic process of grants programme that is inclusive and adapted to diverse players: cultural institutions, independent/NGOs and also creative companies/entrepreneurs. It should follow an arm's length principle, ensuring equal access and a monitoring process. It should be

based on project's proposals and evidence-management evaluation. In the specific case of CCIs businesses funding line, intended for operators who want to set up and develop a business in the CCIs adapted to its different life cycles, it should be developed jointly with Ministry of Economy within its SME's policies and programmes.

b) Promote evidence-based management and collaborations in between state institutions with independent and start-up community.

Gradually introduce more flexible and evidence-based management of CCIs projects, organisations and institutions to which public funding should be dependent on. This will help to create opportunities for qualifications and career development and lifelong learning alongside evaluation of leadership and staff, promotion of strategic planning, including marketing and communication, and business models. In the case of state cultural institutions, the opening up to collaborate and work alongside with the independent sector and other creative entrepreneurs should be promoted. The promotion of networks and collaborations among cultural institutions associated with touring schemes are also fundamental to create synergies.

c) Reduce administrative and financial burden to facilitate CCIs business creation and development.

Establish more business-friendly regulations and incentives for CCIs business creation and development, including investments from abroad. The tax system should be simplified, to allow easy start up – especially regarding reduced obligations for entrepreneurs in ramp up years with reduced obligations for entrepreneurs.

d) Revise legal frameworks to allow pluralism of expressions and fair competition.

Revise the legal frameworks to allow freedom of expression and equal opportunities to state and non-state media in accessing public distribution systems, allocating frequency resources, licensing and advertising. The state has a crucial role to play in ensuring transparency, accountancy and fair competition that may allow overall CCIs development, on areas such as: media outlets ownership, advertising market, distribution of frequencies and licences for broadcasting; but also promoting and favouring the production and distribution of local produced contents.

e) Monitor and raise awareness for copyright and develop collective management accountability.

There is a need to raise awareness for copyright procedures among all the sector stakeholders and to reform and simplify copyright and related rights laws to favour CCIs. Collective management accountability should be further developed, particularly by supporting collective management societies to develop a more transparent collection and distribution of royalties. Assessment and monitoring of copyright industries impacts and dynamics should be fostered by developing inter-institutional relations among competent authorities to facilitate data collection. Finally, new forms of remuneration and business models based on open sources and commons licencing should also be considered and explored.

5.3 Skills, Audiences and Markets

- > **Promote creative and entrepreneurial skills across education system**
- > **Raise awareness about the potential of CCIs across society**

5.3.1 Short-term actions

a) Establish a CCIs showcase and promotion platform and campaign.

Together with NGO and private businesses, establish a common platform for CCIs products and services that can serve as showcase and promotion tool for internal audiences as well as for international public and customers. It can also be used for crowdfunding and users/customers engagement campaigns. In parallel, audiovisual pieces should be produced to tell stories of artists and entrepreneurs, and explain the processes of creation of their contents, products and services.

b) Establish peer-to-peer learning programmes.

CCIs community should organise in collaboration with formal and/or informal educational and training institutions, organisations and initiatives, a programme of peer-to-peer learning workshops to exchange and disseminate management and planning tools and communication practices to cultural institutions and CCIs operators. Entrepreneurs, business and social practitioners and organisations should also be engaged in this process. The programme should invite international experts and operators for discussions, presentations and trainings.

c) Promote creativity and entrepreneurship in schools from early age

Launch a state support programme to CCIs operators to develop educational activities for/with schools within the format of clubs or laboratories. Artists as well as entrepreneurs should develop projects with students that explore creative competences and processes as well as working in creative teams to come up with proposals to issues raised in curricula disciplines or given by surrounding environment/society.

5.3.2 Mid-term actions

a) Promote mobility and exchanges for students and young graduates/entrepreneurs

A joint programme by the Ministry of Culture and Ministry of Education should sponsor regional and international mobility and exchanges in the framework of studies and internships for students and young graduates and entrepreneurs in schools/universities, creative hubs and other CCIs organisations and companies.

b) Introduce entrepreneurial and communication skills development within artistic and cultural curricula in universities.

Higher education establishments should include management courses – including strategic and communication skills and audience development skills – on the diverse artistic, cultural and creative curricula. These courses should make necessary links to the sector organisations and institutions as well as overall society to provide cases for students to work on. Links and joint working groups between arts and creative disciplines students and business and management students should be

encouraged. It should also favour research in the CCIs field, data collection, organisation of guest lectures, open universities, online courses, and competitions in this area.

c) Integrate informal education initiatives as pilot projects into secondary schools and university programmes.

Several informal education initiatives have proven success; therefore, a collaboration process should be promoted with secondary education establishments and universities. Humanities, arts and contemporary culture topics and non-hierarchical learning methods should be tested within the formal education environment and curricula.

5.4 Internationalisation and Cooperation

- > **Increase and support exchanges and presence in international circuits**
- > **Promote Belarusian CCIs internationally**

5.4.1 Short-term actions

a) Launch an international promotional CCIs platform.

A communication and branding platform should be set up to promote the country through its CCIs talents, contents, products and services. This effort should also be articulated with tourism authorities to include cultural tourism stakeholders as one of the key target groups.

b) Build on and reinforce the existing Eastern Partnership cooperation.

Continue and strengthen peer-to-peer learning, sharing, knowledge, information, policy development, communication, and advocacy and awareness raising for the potential of CCIs in EaP countries. Pursue joint capacity building mobility programmes associated with project grants and common platforms to showcase local talents and resources.

c) Sign the European Convention on Cinematographic Co-productions and set up the conditions to benefit and engage in official co-productions

Following up on the new approach to international cooperation and co-productions in the field of film, Belarus should become a signatory of the European Convention on Cinematographic Co-productions and in parallel set up of legal framework to define “national film” which is a legal requirement to be able to set up and benefit from official co-productions.

5.4.2 Mid-term actions

a) Create a focal point to support and promote internationalisation.

This focal point would act as intermediary with two articulated missions: inform and build the capacity of the sector internally; and to promote Belarusian CCIs abroad. The sector requires support for international projects: provide information and contacts, notably via maintaining updated database of partners, investors, networks, consortia and projects; make linkages with international companies; provide coaching and training for cooperation and export procedures and know-

how; identify and develop applications to international funding opportunities. Secondly, it should develop a communication and branding plan to promote the country through its CCIs talents, contents, products/services. Organise showcases and events on CCIs home and abroad. This effort should also be articulated with tourism authorities for including cultural tourism as one of the targets.

b) Set up an efficient mobility grants scheme to participate in international circuits.

A flexible and agile grants scheme – with several regular calls per year – should be set up to support and facilitate international travels, notably to: identify and meet partners, engage in networks, participate in residencies and expose in international fairs, missions and festivals.

c) Support translations and dubbing to promote Belarusian language and culture.

There should be support for promoting translation and dubbing of foreign authors and contents into Belarusian; as well as in parallel the translation of relevant Belarusian authors into other European languages.

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APPENDIX B: LIST OF PARTICIPANTS IN WORKSHOPS, INTERVIEWS AND SITE VISITS

Minsk, 24th - 25th October 2016

Organisation

Alina Dzeravianka, EU-EaP Culture and Creativity Programme

Interviews and meetings

Alexander Adamiants, European College of Liberal Arts
Andrei Liankevich, Minsk Photo Month
Angelika Kraschevskaya, Art Corporation (Festival TEART, Listapad)
Anna Chistoserdova, Y Gallery
Anna Pozniak, Freaky Summer Festival
Anna Samarskaya, teacher, Auditorium project
Igor Sukmanova, Film festival "Listapad"
Ihar Lohvinau, Publishing house Lohvinau
Irina Dem'yanov, National film school and BelarusFilm
Margarita Lazarenkova, Balki Project
Yasia Karalevich-Kartel, Citydog
Nastia Khamiankova, Imaguru Startup Club
Olga Shparaga, European College of Liberal Arts
Rima Epur, Youth Business Incubator
Ulad Vitalichka, Eurobelarus
Vadim Zhuk, Studio 67, Korpus 8
Valentina Kiselyova, Y Gallery
Vladimir Karyagin, Minsk Capital Association of Entrepreneurs and Employers/Association of Legal Entities Republican Confederation of Entrepreneurship
Julia Darashkevich, CEH artcentre

Brainstorming meeting with creative industries representatives

Agnia Asanovich, Play Hello City project
Anastasya Kurilenko, "Strana mini" Museum
Anna Razhentsova, Filmfest Cinema perpetum mobile, LogicLike.com
Darya Ezepova, Imaguru Startup Hub
Irina Lukashenko, Y Gallery
Julia Matskevich, freelance photographer
Katerina Azhgirey, unemploee.by project
Nadzeya Ilkevich, Centre for Cultural Management Gefira
Olga Kavalevskaya, Belarusian Union of Architects

Site Visits

Balki Project
Cech Gallery
Korpus8 Creative Hub
Imaguru Startup Hub
Oktyabrskaya street
Y Gallery
Youth Business Incubator (Chapaeva 3)



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