

DOI: [10.55643/fcapter.2.43.2022.3702](https://doi.org/10.55643/fcapter.2.43.2022.3702)
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Received: 02/02/2022

Accepted: 19/02/2022

Published: 29/04/2022

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# PLANNING THE ACTIVITY OF A CREATIVE INDUSTRIES SUBJECT IN A TURBULENT ENVIRONMENT

## ABSTRACT

The current form of globalization defines a new plane in which cultural practices interact with creativity and innovation on a global scale, thus forming a new sector of the economy - creative industries. They cover economic activities related to the acquisition, use, transformation, dissemination and commercialization of information and knowledge that have a significant economic and social impact (for example, promoting sustainable development and creating inclusive jobs). Thus, creative industries are turning into a stabilizing element of the country's competitiveness. The aim of the work is to determine the features of planning the activities of creative industries in the turbulent modern economic environment and identifying prospects for strengthening their competitiveness. The methodology of this study requires research practices that are consistent with the intersection of creative economics, international relations, macroanalysis, and geography. It is based on the study of the impact of the creative sector on the economic environment in Ukraine. Results. The results of the study show that greater support for Creative Industries is needed to strengthen their involvement in the innovative system of the economy and the system of creating added value. In this regard, there is an urgent need for a critical understanding of creative work and the study of its status in Ukrainian society. The awareness campaign should begin with the study, development and implementation of new educational programs to professionalize the new sector and stabilize career paths. In order to make informed decisions, it makes sense to study the role of the creative class in the national social system. The prospects for further research are to evaluate the effectiveness of creative industries in Ukraine and compare them with leading European countries.

**Keywords:** culture, creativity, cultural industries, creative industries, creative economy

**JEL Classification:** M14; M3; O47

## INTRODUCTION

Globalization is one of the main phenomena facing modern society, affecting all aspects of human activity at the present stage. Over the past few decades, globalization has changed the world dramatically, creating many benefits for the development of national economies. The economy of many countries itself is undergoing significant structural changes, as traditional industries are being replaced by the service sector and innovation, which marks the transition to a knowledge economy, where creativity plays a special role [1].

Żelazny, R., & Pietrucha, J. determine that a creative economy is an economy in which conditions for the development of creativity exist and are regarded as an accelerator of innovativeness on micro, meso and macro level. It includes four main components: inventive economy, political institutions, business regulations and fiscal institutions [2].

Creativity is an inexhaustible resource based mainly on ideas and cultural features, rather than physical capital. The modern form of globalization defines a new plane in which cultural practices interact with creativity, commerce and innovation on a global scale, thus forming a new sector of the economy - creative industries. They encompass economic activities related to the generation, use, transformation, dissemination, and commercialization of information and knowledge with significant economic and social

impact (e.g., the promotion of sustainable development and the creation of inclusive jobs). Thus, the creative industries become a factor of stabilization and strengthening of the country's competitiveness.

This study aims to determine the features of planning the activities of creative industries in the turbulent modern economic environment and identifying prospects for strengthening their competitiveness. It can also be seen as an attempt to measure the contribution of the creative sector to the economic and social development of countries.

## LITERATURE REVIEW

The development of the economy of any country in the twentieth century requires a rapid response to global changes and trends. The global market over the last decade has dictated the requirements of an innovative, non-standard approaches to doing business, managing the economy, and integration between different sectors of the economy. Thus, economics is increasingly gaining signs of related specialties - socio-political and socio-cultural spheres of life activity.

The latest trends not only in the modern European market but also in the world as a whole, are the development of creative industries. Since the concept of "creative industries" is fairly new in economic science, scientists use several definitions.

Cultural and creative industries are rather new concepts in Ukrainian scientific literature, though the term "creative industries" in the public sector was first defined in the late twentieth century by the British Government's Ministry of Culture, Media and Sport [3].

The Cambridge dictionary defines creative industries as those based on work in which original ideas are important, such as artwork or media work, computer software development, etc. [4].

Usually, the terms "creative industries" and "cultural industries" are used interchangeably or in parallel, although their classical definition was recorded by UNESCO as "cultural and creative industries". As Parkhomenko, I.I., Proskurina, M.O. claim, there is a clear logic of distinguishing between cultural and creative industries on the basis of the product of production (final result of production), which is enshrined in UNESCO and EU documents [5]. This cumulative notion referred to industries combining the creation, production, and commercialization of meanings of an intangible nature belonging to the cultural sphere. Being a product or service, they are usually protected by copyright and are referred to as industries of the future in economic literature [5]. And the use of the term "creative industries" (in plenty) only emphasizes their cumulative origin.

In general, the cultural industries sector includes such groups as advertising, architecture, art and antique markets, crafts, design, fashion, film and video production, programming, including the creation of entertainment and interactive programs and computer games, music, performing (performative) arts, publishing, television, radio, and Internet broadcasting [6].

At the legislative level, identifying, developing and supporting the creative industry in Ukraine began in 2018, almost 20 years later than in the international arena. In Ukraine, the concept of "creative industries" in the current legislation is defined in the Law of Ukraine "On Culture" as follows: "creative industries - economic activities aimed at creating added value and jobs through cultural (artistic) and / or creative expression" [5-7].

The list of economic activities that belong to the creative industries (CI) is determined by the Government of Ukraine. These include, in particular, arts, performing arts, publishing, design, fashion, IT, audiovisual art, architecture, advertising, libraries, archives and museums, folk arts and crafts [5-8].

The "creative industries" continue to grow steadily and play a defining role in shaping the future of culture. In particular, the crisis of 2020 did not negatively affect the volume of foreign trade in services of Ukraine's creative industries), Computer Services (+ 21%) and Advertising and Marketing (11%). On the other hand, the volume of exports of Architectural, engineering and other technical services decreased (-21%), Other services to individuals and services in the field of culture and recreation (-21%) and R & D (-7%) [4]. They open up possibilities of free expression, cultural diversity, and economic development, although at the same time they are under the dualistic influence of globalization: through the development of the latest technologies, globalization opens up new perspectives and simultaneously shapes new types of inequalities. Now delineated geographically as a North-South divide, these inequalities can be mitigated by strengthening local capacity and facilitating access to world markets at the national level through new partnerships, innovation, copyright infringement control, and international cooperation.

The industries belonging to the creative industries have different financial growth opportunities, economic activity logic,

and dynamics. From the point of view of the business form, such industries develop based on small and medium entrepreneurship, producing creative (creative) products and providing creative services. Each of such enterprises pursues the goal of enhancing the competitiveness of its products in international markets.

A fundamental contribution to the study of creative economy was made by the American scholar John Hawkins. He was the first to use the term "creativity" in scientific literature. In his work, Hawkins interprets it as the ability to create something new. It means the creation by one person or group of people of inventions or ideas that are individual, original, and meaningful. Moreover, it was in this work that Hawkins found a direct link between creativity and economic development. Thus, the researcher argues that new combinations of creativity and economy create exceptional economic value and profitability. Another American researcher, Richard Florida, outlines the emergence of a new social class - the "creative" class. The creative class has caused and will continue to cause, profound and radical changes in the way we work, in our values and desires in almost every aspect of our daily lives. In addition to an in-depth analysis of the preconditions, principles, and innovations of the creative economy in society, the author analyzes and substantiates the key characteristics and features of the new creative class. He argues that the growth of human creativity will become a determining factor in our economy and society. The author emphasizes that more and more traditional economic professions will be transformed into creative professions [7].

UNESCO [10] defines cultural and creative industries as activities whose main purpose is the production or reproduction, promotion, distribution, or commercialization of goods, services, and activities of a cultural, artistic, or heritage nature. There are seven activities in the creative industries, based on UNCTAD's classification of creative goods and services [11]:

1. Audiovisual media: (films, television, radio, new media, music);
2. Publishing (books, newspapers, other printed matter);
3. Performing arts (theater, opera, festivals, creative spaces, and others);
4. Visual arts (painting, photography, sculpture, antiques);
5. Design (architecture, fashion, interior, jewelry, toys);
6. Arts and crafts (carpets, wickerwork, paper, yarn, and other arts and crafts);
7. Creative services: advertising, market research, and public opinion polls; research and development; architectural, engineering, and other services; audiovisual and related services; computer services; information services; franchises and similar rights; other royalties and license fees.

Creative industry revenues globally in 2020 exceed those of telecommunications services (\$1,570 billion worldwide) and exceed India's GDP (\$1,900 billion). In total, the top three in terms of revenues are television (\$477 billion), the Fine Arts (\$391 billion), and newspapers and magazines (\$354 billion). With 29.5 million jobs, CI employs 1 percent of the world's active population. The top three employers are Fine Arts (6.73 million), books (3.67 million), and music (3.98 million) [11].

Among the researchers of the creative economy and creative industries, the scientific work of the team of authors [12] should be highlighted. In their monograph, they analyzed a wide range of problems of the creative sector of the economy, its components, the influence of culture on the emergence of creative industries. The scientists paid much attention to the formation of foundations and the development of a creative economy in Ukraine. They consider the problems of creating the necessary ecosystem, creative clusters, the construction of soft infrastructure that would allow to develop of creative industries on a regional and national level. In addition, they carefully analyze the world experience of creative space formation, in particular, in the USA, EU countries, and South Asia. Examples of creative transformation of the EU regions are considered in the work "Regional Policy of the European Union" [11 13].

Cultural industries have emerged on the edge of culture, economy, and technology, combining the rational with the irrational, precision with uncertainty, logic with emotionality. This combination makes a new category contradictory and ambiguous and at the same time provides a constant interest of professional researchers, scientists, and analysts, as well as ordinary citizens. Since the end of the XX century. In the world scientific society, there are active discussions and debates about the new categories. Ukraine is also gradually included in this process [14].

The idea of creative industries itself is not new: there is a great deal of research in this field that is a relatively new concept. Creative industries are sectors of organized activity whose primary purpose is the production or reproduction, promotion, distribution, and/or commercialization of goods, services, and activities of a cultural, artistic, or heritage nature [10]. Because the creative industries create an environment of art, culture, and economic activity, they are considered to be a business sector.

The term “creative industries” is often replaced by other terms depending on the country. They are called experience industries/cultural industries/creative culture and creative industries in Scandinavian countries (Sweden, Denmark, Norway, and Finland), entertainment and media/copyright-based industries in the United States, creative and cultural European countries emphasizing cultural heritage and elements of its creative activities, based on local traditions and art.

There is no fundamental difference between them all. UNESCO states that cultural industries are those industries that include the production and commercialization of creative content that is intangible and cultural, such as publishing books, films, etc. In turn, the creative industries are those industries that produce tangible or intangible artistic and creative products with the potential to create wealth and generate income through the exploitation of cultural assets and the production of knowledge-based goods and services (both traditional and contemporary). Thus, the creative industries are derived from the cultural industries because there are obvious links and continuities with cultural industries such as performing arts and crafts. Subsequently, the term “creative industries” takes on the features of a wide range of creative activities, especially personal ones, of which the cultural industries are an integral part. The latter marks a historical shift in the approach to potential commercial activities, which until recently were viewed exclusively or predominantly in non-economic terms.

This differentiation is not so important in terms of naming the new sector as it contributes to the understanding of what the creative industries are. Thus, the creative sector relies on creativity, technology, and culture [15]. It is now believed that there is a creative industry in Ukraine only at the stage of formation and formation. However, in the Global Creativity Index 2015, Ukraine ranked 45th out of 139 due to key factors such as talent, high education and technology development. This result indicates that the national economy has all the necessary prerequisites and potential for growth of added value created in the creative industries sector [30].

Creativity is one of the most interesting and profitable areas of the economy. For this reason, the basic principles of success include uniqueness, endless learning, breaking the rules. So, the proposed concept of the creative economy, which emerged as a means of focusing on the role of creativity in modern economic life, emphasized that economic growth and cultural expansion are not separate processes, but can be part of a broader development process [16].

This achievement caused an intensification of research into the idea of creativity as part of economic success. One of the most obvious shortcomings of creative industries policy is its preoccupation with something new, and its insistence that everything is completely different, a mental ignorance often of its history. Such a belief has also arisen in connection with creativity with urban economic development and urban planning [17]. The introduction of the term “creative city” in response to the rapid economic and social changes in the world. Landry confirms that it is necessary to create appropriate conditions for people to think, plan and act with imagination, solving urban problems. Particular attention is paid to the contribution of the arts and creative industries in stimulating innovation in cities [18].

Cities function as creative fields, generating streams of both cultural and technological innovation, but not all cities can succeed. Some cities, to be successful, have built or created clusters of specialized industries, usually in location, natural resources. The advantage of a cluster is the synergy of its members, being able to do their work in an inter-industry collaboration of small businesses. Thus, a cluster is the most optimal form of innovative development in any sphere [19].

A creative cluster is a geographical concentration of individuals rather than businesses producing creative goods and services [18 20]. A creative cluster is seen as a place that describes both a community of creative people and a catalyst place where people, relationships, ideas, and talents contribute to each other. Being nearby, creative people spread and exchange ideas, and express themselves freely. Clustering creates an environment conducive to collaboration and the development of both creativity and commerce. That is, creative companies use a resource-sharing strategy to solve structural problems [19-21].

The promotion of creative clusters in urban areas by public authorities can be based on one of two approaches: a people-oriented approach and/or a business-oriented approach [22]. The people-oriented approach is aimed at improving the quality of life of urban residents to attract creative talent, which in turn generates investment, promotes job growth, and stimulates the emergence of start-ups. The business-oriented approach focuses on the formation of a creative production environment, hence, undoubtedly, favorable conditions for the development of creative businesses, such as tax incentives and subsidies.

Burru, suggested ten characteristics that are common to the formation of a creative environment by scholars in business, economics, geography, leadership, urban studies, education, and the arts have been proposed. They include the presence of knowledge and expertise in the subject area, the interaction between cultures and between different ideas, open communication and the free exchange of ideas, stable environment with future opportunities, opportunities for solitude and interaction, presence of other creative people generating new ideas, inclusive leadership clarifying values and setting goals,

visual and auditory stimuli, reflective thinking and practices, and risk-taking, failure and ambiguity [23].

Eger J. describes the creative class, according to the author's concept, as a group of creative workers in the cultural and creative industries, as well as different types of managerial, professional, and technical workers who produce different innovations. The group characterized by the author is engaged in science, design, engineering, architecture, education, music, art, and entertainment, their economic function is to create new ideas, technologies, and creative content. the creative class, according to the author, is the key driving force of the economic development of post-industrial cities [24].

There are now different approaches to defining the creative industries, ranging from a narrow approach in which the creative sector is defined through one specific policy area, such as culture, to a broader approach in which creativity is linked to virtually all aspects of human activity [25-29].

Despite the relevance of the topic and its development abroad, in Ukraine, a wide range of topics and issues concerning the creative industries are covered fragmentarily in the context of interdisciplinary research on sustainable development. Therefore, the purpose of the work is to determine the features of planning the activities of creative industries in the turbulent modern economic environment and identify prospects for strengthening their competitiveness.

## RESULTS

In the post-industrial era, culture becomes a key resource of the regional economy, a kind of capital in the development of local areas. This statement is by no means an exaggeration. The world experience of the last years testifies to the growing interest in culture, to the cultural potential, especially within the framework of solving the dilemmas of formation of the modern urban space. As the stimulus for the formation of interest is the possibility of effective interaction between culture and business, culture and tourism, cultural tradition and innovation. Among the popular practices of successful involvement of cultural resources in the commercial environment experts name creative (creative) industries.

Creative or creative industries (Creative Industries) are the types of activities, the aim of which is to activate individual creativity, whose skills or talent contribute to the creation of added value and jobs through the production and exploitation of intellectual property.

Creative industries form a subset of creative industries. Creative industries range from traditional cultural heritage knowledge, such as arts and crafts and cultural celebrations, to more modern technological services, focused on subsets, such as audiovisual and new media. UNCTAD's classification of creative industries is divided into four main groups: heritage, art, media, and functional group. These groups include nine subgroups. According to the UNCDAT report, the classification of the creative industries can be schematically depicted (*Table 1*).

| Table 1. Classification of Creative Industries   |   |  |
|--|---|--|
| Group  | Subgroup  | Area of activity                           |
| Heritage (origin of all art forms, cultural and creative industries; combines cultural aspects of historical, anthropological, ethnic, aesthetic and social activities of society, affects the creativity and origin of a number of goods and services and cultural events). | Cultural attractions and places                     | Museums, libraries, exhibitions            |
|  | Traditional cultural activities                     | Art crafts, festivals, celebrations        |
| Art (includes creative fields based solely on art and culture. Work in the arts is usually created under the influence of knowledge about heritage, the meaning of individuality, and symbolic meaning.).  | Performing arts                                     | Live music, theaters, dance, opera, circus |
|  | Visual Arts   | Paintings, Sculptures, Photos, antiques    |
| Media is another group that encompasses two subsets of media, creating creative Content to communicate with large audiences  | Audio-visual art                                    | Movies, TV, Radio                          |
|  | Newmedia  | Electronic Media, Digital Technologies     |
|  | Publishing  | Books and Magazines                        |
| Functional (includes service-oriented industries that create goods and services with functional purposes)  | Creative Services                                   | Architecture, Advertising, Recreation      |
|  | Design (interior, graphics, fashion, jewelry, toys) | Interiors, Graphics, Fashion               |

Source: developed by the author on the basis of [3;5;9;12;14;16]

Before moving on to a more detailed analysis of the classifications, it is necessary to define the creative industries. Thus, the creative industries:

- are types of economic activities for the production and distribution of goods and services that use creativity and intellectual capital as the main factors of production;
- represent a set of knowledge-based activities focused on the potential income from trade and the realization of intellectual property rights;
- create tangible products and intangible intellectual or artistic services with creative content, economic value, and market purposes;
- are at the intersection of crafts, services, and industries;
- are a new dynamic sector in world trade.

Let us return to the classification of creative industries into four large groups.

The definition of industries belonging to the creative industries differs from country to country. In parallel with the model developed and proposed by UNESCO, countries introduce their terms and their content, adapted to their economies, competitive advantages, and opportunities. Several such models with a list of industries are shown in *Table 2*.

**Table 2.** Comparison of the classification of cultural and creative industries in selected countries of the world

| Type                     | UNESCO | United Kingdom | Canada | Denmark | Lithuania | Taiwan | Australia |
|--------------------------|--------|----------------|--------|---------|-----------|--------|-----------|
| Music                    | +      | +              | +      | +       | +         | +      |           |
| Performative art         | +      | +              | +      |         | +         | +      | +         |
| VisualArt                | +      | +              | +      | +       | +         | +      |           |
| Crafts                   | +      | +              | +      | +       | +         | +      |           |
| Design                   | +      | +              | +      | +       | +         | +      | +         |
| Fashion                  |        | +              |        |         |           |        |           |
| Book publishing          | +      | +              | +      | +       | +         | +      | +         |
| TV andradio              |        | +              | +      | +       | +         | +      | +         |
| Film, video              | +      | +              | +      | +       | +         | +      | +         |
| Advertising              | +      | +              | +      | +       | +         | +      |           |
| Architecture             | +      | +              |        | +       | +         | +      |           |
| Cultural Facilities      |        |                |        | +       |           | +      | +         |
| Software                 | +      | +              | +      |         | +         | +      |           |
| Computer and video games |        | +              |        |         | +         | +      |           |
| Creative Lifestyle       |        |                |        |         | +         | +      |           |

*Source: developed by the author on the basis of [5;9;12;14;16]*

In Ukraine, the term “creative industries” has not only actively entered the general circulation but also received legislative consolidation and classification distinction. For a long time, the terms “creative”, “cultural” and “creative” industries were used in the domestic literature as synonyms, however, we note that in recent years researchers in their works distinguish cultural industries into a separate sector of the creative industries (which themselves are broader and more universal concept). At that, the authors refer to the definition of the Department of Culture, Media and Sport of the government of Great Britain in 1998 (where the English translation of creative industries was fixed as “creative industries”): “activities based on an individual creative principle, skill or talent, carrying the potential to create added value and jobs through the production and exploitation of intellectual property.”

The difference between the terms “cultural industries” and “creative industries” is clearly defined by the “Culture and Creativity” project: “the concept of cultural industries refers more to cultural heritage and traditional forms of creativity, while creative industries are understood as applied creative practices, innovation and job generation through the creation



of intellectual property.”

In 2016 the Ministry of Culture of Ukraine created a department for the development of cultural and creative industries, and since 2017 there has been a sector for the development of creative industries. The development of cultural and creative industries (CCI) is recognized as a priority direction of the “Long-term national strategy of cultural development until 2025”.

To continue the development of the sector in 2019, the Cabinet of Ministers (Decree No. 265-r of April 24, 2019) approved a list of economic activities belonging to the creative industries, with a list of relevant Standard industrial classification of economic activities. In particular, creative industries include folk arts and crafts, visual art, stage art, literature, media activities, audiovisual art, design, fashion, architecture and urban planning, advertising, and museum business. A complete list (with Standard industrial classification of economic activities– codes of economic activities according to the National Classifier of Ukraine DK 009:2010) is provided in *Table 3*.

**Table 3.** Types of economic activities included in the creative industries

| Code  | Name of the type of economic activity                       | Code  | Name of the type of economic activity                                   |
|-------|---|-------|---|
| 32.12 | Manufacture of jewelry                                      | 62.02 | Consulting on informatization issues                                    |
| 32.13 | Manufacture of jewelry and similar products                 | 63.91 | Activities of information agencies                                      |
| 32.20 | Manufacture of musical instruments                          | 70.21 | Activities in the field of public relations                             |
| 58.11 | Publishing of books   | 71.11 | Architecture activities   |
| 58.13 | Newspaper printing  | 72.20 | Research and experimental development in social sciences and humanities |
| 58.14 | Publication of magazines and periodicals                    | 73.11 | Advertising agencies  |
| 58.19 | Other publishing activities                                 | 73.12 | Mediation of advertising in mass media                                  |
| 58.21 | Publication of computer games                               | 74.10 | Specialize activities in design   |
| 58.29 | Publication of other software                               | 74.20 | Activities in photography   |
| 59.11 | Production of films, video films, and television programs   | 74.30 | Provision of Translation Services                                       |
| 59.12 | Compilation of cinema and video films, TV programs          | 85.52 | Cultural education  |
| 59.13 | Distribution of films, video films, and television programs | 90.01 | Theater and concert activities  |
| 59.14 | Demonstration of films                                      | 90.02 | Activities supporting theatrical and concert events                     |
| 59.20 | Publication of sound recordings                             | 90.03 | Individual artistic activities  |
| 60.10 | Activities in the sphere of radio broadcasting              | 90.04 | Functioning of theater and concert halls                                |
| 60.20 | Activities in the sphere of TV broadcasting                 | 91.01 | Functioning of libraries and archives                                   |
| 62.01 | Computer programming  | 91.02 | Function Ingo museums   |

*Source: developed by the author on the basis of [9;12;14;15;16]*

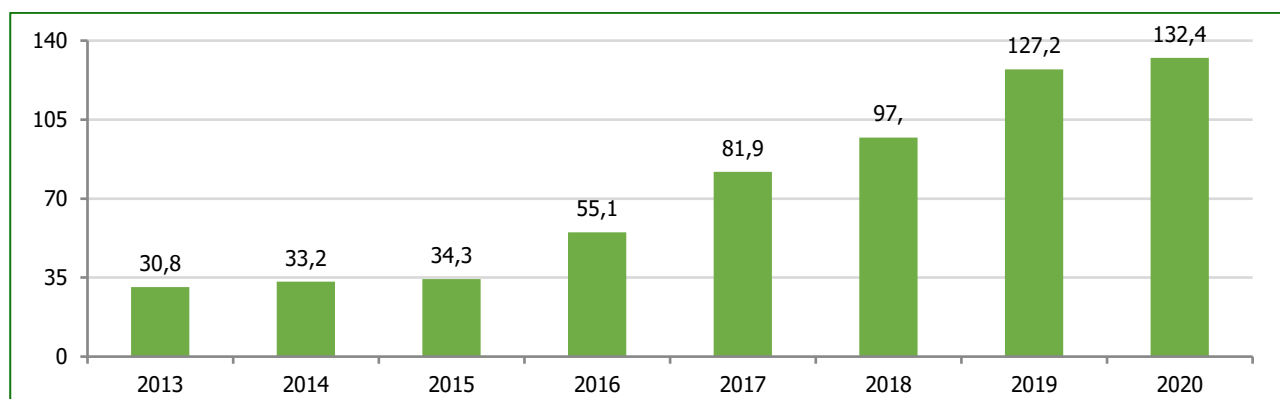
Such a step in the legislative field - the assignment of Standard industrial classification of economic activities - through the application of the list of economic activities related to the creative industries, will establish basic economic indicators:

- contribution to the gross domestic product of the state;
- the proportion of persons employed in these fields;
- the number of businesses and their turnover.

According to the results of the study conducted in 2019-2020 and the implementation of the UNESCO system of indicators in Ukraine, it was found that the contribution of cultural and creative industries to GDP is 4.04%. Of course, compared to other industries (or sectors of industry), this contribution is not indicatively large (for example, the contribution of agriculture, forestry, and fishing – 11.65%), but is quite commensurate, in particular with the mining industry (5.72%), financial and insurance activities (5.11%) or construction (2.67%).

During 2017-2020, the value-added of the underlying industries belonging to the creative industries (CIs) is growing both quantitatively and percentagewise (Figure 1).

Compared to 2016, the added value of CI nominally doubled – from 55.1 billion UAH in 2016 to 97 billion UAH in 2018. The stagnation of 2013-2015 is explained by the crisis aggravation due to the beginning of hostilities in Eastern Ukraine and the annexation of Crimea, when, first of all, basic needs were satisfied, and the sphere of culture and creative industries was relegated to the background. As a percentage of total value added in Ukraine, the share of creative industries declined from 2.97% in 2013 to 2.46% in 2015. As of 2018, CI's share was almost 4% (3.86%). In 2020, the creative industries contributed 0.3% more to GDP than a year earlier.



**Figure 1.** Indicators of the added value of creative industries in Ukraine in 2013-2020 billion UAH.

The number of those employed in the creative industries is also growing: so, the share of those employed in CI rose from 2.5% in 2013 to 3.6% in 2018. Quantitatively, the difference between the employed in CI in 2013 and 2018 is 51,187 people, and during this period there was a drop only in 2015 (Table 4).

**Table 4.** Number and share of workers employed in creative industries in Ukraine in 2013-2020

| Indicator   | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    |
|---|---------|---------|---------|---------|---------|---------|---------|---------|
| Number of employed workers in the CI (base), people.                        | 252,259 | 265,100 | 248,512 | 262,617 | 283,293 | 309,446 | 352,811 | 360,455 |
| Share of employees employed in the CI from the total number of employees, % | 2.5     | 2.9     | 3.0     | 3.2     | 3.4     | 3.6     | 3.6     | 4.0     |

Different sectors of the creative industries demonstrate growth. In 2018, the official volume of sold products by Ukrainian advertising agencies amounted to 27.8 billion UAH, and the export of IT services – 4.5 billion dollars. Also note the success of Ukrainian film production and cinematography: the number of Ukrainian films that are released in theaters is growing in recent years. According to Goskino, 35 full-length Ukrainian films were released in 2018, which collected more than 198 million UAH in the box office.

In 2019, the share of creative economy industries (arts, sports, entertainment, recreation) in GDP in the second quarter increased by 3.8% compared to the same period of 2018. For the first time, as the Ukrainian economy is showing growth, these figures are close to the growth rate of the economy as a whole - 4.1%. In previous periods, the lag in the growing share of culture and the economy was more significant: in 2018, culture grew by 0.7%, while GDP grew by 3.3%; in 2017 – by 0.7% and 2.5%, respectively.

Creative industries are one of the most vulnerable areas of the Ukrainian economy during the COVID-19 pandemic. This is due to several reasons:

1. 90% of the industry of all business entities are individual entrepreneurs. Such organizational-legal form complicates the attraction of large volumes of investments. Currently, the main sources of funding for the creative industries are personal funds, state and international grants, and subsidies (Ukrainian Culture Fund, Ukrainian Book Institute, State Film Agency of Ukraine, donors, and crowdfunding). In the conditions of the pandemic, it is very hard for small and micro enterprises to stay afloat without additional cash flow. But it has become much more difficult to get funds because almost all representatives of creative industries need help. Therefore, in the current competition in the Ukrainian market, only those who will not only be able to transform themselves into new realities, but also impress potential investors with their products will survive;



2. In Ukraine there are still low incentives for the legal registration of creative enterprises. The reasons are seen in significant barriers for financing creative industries (lack of legislation on sponsorship and patronage, which would provide favorable conditions for businesses that support cultural projects); - barriers for international cooperation (insufficiently effective regulation of joint international projects in the film and music industries, uncoordinated legislation, unattractive conditions and mechanisms to encourage international cooperation); - imperfect mechanism of control over the implementation of legislation;
3. Therefore, the sector is characterized by a high percentage of the shadow market of around 60%. Because of this, representatives of this industry cannot apply for assistance under government programs;
4. The activity of many creative enterprises is associated with the holding of mass events, which need to be planned and organized in advance. The low availability of infrastructure is accompanied by the problem of quarantine restrictions, the constant change of which does not allow the organizers to plan events. This leads to additional losses because the cancellation or postponement of an event costs the organizers an average of 30% of its cost.

During the first two weeks of quarantine (March 2020) sales in the creative industries decreased by 50%; during the first month and a half of the quarantine, the budget did not receive 2.9-4.4 billion UAH of tax revenues from the cultural and creative industries sector. Their closure led to the reduction of 50,000 jobs, which will cost the budget 0.4-1.2 billion hryvnias of unemployment benefits.

According to the survey conducted by PPV Knowledge Networks "On the impact of COVID-19 on the cultural and creative industries in Ukraine" (conducted from 23.03.2020 to 30.03.2020), almost 40% of entrepreneurs have lost more than 75% of their income. As of March 2020, 38% of respondents have already lost most of their annual turnover. Another 32% expect to lose it due to the spread of the coronavirus. 67.5% noted a decline in sales. And only about 8% said that the quarantine had no effect on their operations. 72% consider CI to be the most vulnerable to the effects of COVID-19.

During the quarantine, 20% of respondents worked online. After the quarantine was announced, 48% were able or would be able to get to work online. 54% said the changes in the organization would be relevant in the future.

27% would not be able to go online at all. This is a special risk group that needs immediate support. Most are from the music industry, film industry, ticket operators, theaters, cinemas, museums, and annual festival organizers. For the most part, they have no "financial safety" cushion. The lack of an audience and the impossibility of holding events had an immediate negative impact on profits. So, concerts on game servers, online festivals, self-isolation clips, VR shows, and vertical concerts are by no means a complete list of innovations in response to the ban on public events. And while from July to November it was still possible to work in certain regions (depending on the epidemiological situation), in December (when all mass events and mass gatherings were banned), as well as in January 2021, during the lockdown, these sub-sectors are completely stopped [6]. Worst of all, the music industry, like cinemas, is completely confined to the Ukrainian market and functions only at the expense of listeners/viewers or private investment. For example, the cinemas that did not operate from mid-March to early July were the hardest hit. According to the State Statistics Service, in March-September 2020 tax revenues from the cinema business in the state and local budgets compared to the same period in 2019 decreased by more than half: from 104.7 million UAH to 47.6 million UAH. And the film industry (film production), museums, theaters cannot do without public funds. Although the cinema industry opened at the end of May and museums were allowed to open earlier (in mid-May), most of them remain closed due to the lack of funds for obligatory disinfection and protection. The worst situation is in cinemas - it is not yet known when they will be able to resume their activities [6].

Therefore, several acute problems arose in the quarantine environment. First of all, Ukrainian listeners and viewers do not have the habit of paying for an intangible product. According to researches, only 0.88% of family expenses fall on culture. The same figure in countries with a similar GDP to Ukraine is 2% or higher. The main reason is ignoring copyrights (illegal use of content, non-payment of royalties to authors) [5].

But on the other hand, quarantine helps to find ways to bring the product to the audience, which work well in any environment. For example, in the context of the crown crisis in Ukraine, crowdfunding platform Patreon is becoming increasingly popular (you can support your favorite artist or get paid access to exclusive content. It allows performers to fully function at the expense of donors. Therefore, its development in our country is only a matter of time Even online concerts have become profitable, and although this type can quickly lose an audience, it has become useful for the country, as it is a huge support for the industry under any circumstances.

Thanks to the protests of the creative industries, the state began to develop an action plan to mitigate the effects of quarantine on the industry. Two pieces of legislation currently regulate the issue: Law of Ukraine of 16.06.2020 № 692-IX «On Amendments to Certain Legislative Acts of Ukraine Concerning State Support in the Sphere of Culture, Creative

Industries, Tourism, Small and Medium-Sized Business in Connection with Restrictive Measures Related to the Spread of Coronavirus COVID-19», Order of the Cabinet of Ministers of Ukraine of February 3, 2021 № 84-r «On approval of the action plan to support the sphere of culture, protection of cultural heritage, development of creative industries and tourism». The amendments concern the Budget and Tax Codes of Ukraine, as well as some legislative acts of state support in the sphere of culture, creative industries, tourism, small and medium-sized businesses.

The creative industries sector has significant potential in the context of Ukraine's economic growth. A prerequisite for the development of Ukrainian policy at the level of global best practices (in particular, the European Union) and the development of national creative industries is the need to overcome the key constraints on competitiveness that characterize this sector. These are constraints that affect the ability of companies to compete in the market, communicate with their customers, and adapt to a dynamic environment.

Table 5 assesses the key constraints on the competitiveness of enterprises in the creative industries sector.

| <b>Table 5. Matrix limitations of competitiveness of creative industries</b> |  |
|--|--|
| <b>Determinant</b>   | <b>Content</b>   |
| The ability of companies to compete in the market                            |  |
| Quantity and cost requirements   | <ol style="list-style-type: none"> <li>1. The complexity of the tax system slows down the growth of the sector and the competitiveness of the creative goods / services produced.</li> <li>2. Excessive regulation and underdeveloped online payment infrastructure hinder the development of e-commerce.</li> </ol>   |
| Quality requirements   | <ol style="list-style-type: none"> <li>1. Unsystematized information on trends in the sector and the requirements of external markets lead to inadequate adaptation of creative products to the needs and demands of consumers.</li> <li>2. Relatively low demand in the domestic market has a negative impact on competitiveness and improved product quality.</li> </ol>   |
| The ability of companies to communicate with their customers                 |  |
| Customer contact   | <ol style="list-style-type: none"> <li>1. Weak marketing and global positioning of Ukrainian creative products negatively affect the recognition and recognition of the sector abroad.</li> <li>2. Limited skills of enterprises in the field of marketing and product promotion prevent access to new customers and markets.</li> <li>3. Lack of membership in international sectoral organizations and associations reduces the competitiveness of products in foreign markets.</li> <li>4. Lack of systematic state support for the promotion of creative industries abroad limits the opportunities of the sector.</li> <li>5. Insufficient efforts to implement the new applicable legislation to foreign economic operations may limit the capabilities of the sector in foreign markets.</li> </ol> |
| Contact suppliers  | <ol style="list-style-type: none"> <li>1. Limited cooperation within the sector and individual creative industries prevents the creation of additional added value.</li> <li>2. Enterprises in the creative industries have weak links with related ones sectors (tourism, information and communication technologies, etc.).</li> </ol>   |
| Communication with institutions  | <ol style="list-style-type: none"> <li>1. The sector is characterized by a lack of understanding of the structure of the political, legal and economic levels.</li> <li>2. Public authorities do not have reliable statistical and analytical ones sector data.</li> <li>3. The trade support network does not meet the needs of enterprises.</li> <li>4. Public-private dialogue is not properly established.</li> <li>5. Given the dispersion of the sector, professional networks and associations are taking too few measures to support the sector.</li> </ol>  |
| The ability of companies to adapt to a dynamic environment                   |  |
| Funding requirements   | <ol style="list-style-type: none"> <li>1. Insufficient financial support hinders the development of the sector.</li> <li>2. Lack of a strategic approach to attracting investment from existing and potential investors are limited by the possibility of diversification.</li> <li>3. Imperfect rebate scheme in the audiovisual subsector does not allow companies to finance large-scale projects.</li> </ol>   |
| Skills requirements  | <ol style="list-style-type: none"> <li>1. Chronic mismatch between the industry's required technical and professional skills and those obtained in educational institutions constrain productivity labor.</li> <li>2. Lack of business / management / marketing skills limits the potential of enterprises.</li> </ol>   |

*(continued on next page)*

**Table 5.** (continued)

| Determinant                                | Content  |
|--|--|
| Requirements for technology and innovation | <ol style="list-style-type: none"> <li>1. The institutional framework for the protection of intellectual property rights lacks consistency and integrity.</li> <li>2. The intellectual property system does not fully comply with international and European standards, especially in the field of monitoring and law enforcement.</li> <li>3. Insufficient awareness of the specifics of protection of intellectual property rights among enterprises / rights holders hinders the development of the sector.</li> <li>4. Lack of support system for business incubators and accelerators hinders the creation of startups and new businesses.</li> </ol> |

*Source: developed by the author on the basis of [30]*

Competitiveness is determined by the ability of enterprises to adapt and adequately respond to changes in the conditions of comparison of one enterprise with others that operate in a turbulent environment.

In order to maintain a competitive position in the global market, the creative industry should take into account the above challenges of the external environment and consider possible options for responding to their emergence in their business models.

The formation of operational and tactical activities of the creative industry in the paradigm of the matrix "consumers." Is the key to achieving the key goal - the formation of competitive advantages in the global market of creative industries by building national ideas,

Despite all attempts to get out of the difficult situation, both the Minister of Culture and representatives of the creative sector agree that the creative industries in the near future will be helped not only by the full resumption of work but also by the huge amount of investments. They are needed not only for the huge number of start-ups in the CI sector but also to get everyone else back on track. After all, the level of development of the creative industries is directly related to the country's economic development. If there are growth tendencies in the country's economy, the financial support of culture by investments of citizens and private business will grow (it will become prestigious to invest in culture). However, the processes of deregulation and liberalization of the economy - when simplification of customs and administrative procedures, a clear system of taxation, absence of corruption, and pressure will act as incentives for the development of business and culture - will remain decisive in this mutually profitable growth.

The difficulty of planning the activities of creative industries, including their competitiveness, is the inability to accurately plan the demand for products, because most of all industries depend on the tastes and preferences of consumers. And given that the Ukrainian economy is an example of a developing economy, the key factors in ensuring the competitiveness of creative industries will be partial coverage of labor costs by the state; financing of the activities of creative industries through grants; development of programs to reduce tax contributions; development of anti-crisis programs for companies that cannot work online; reduction of rent for commercial real estate for the quarantine period.

## CONCLUSIONS

Over the past few decades, the global economy has been confronted with new challenges and problems related to knowledge, technology, and imagination, which are united by the single term "creativity". Creativity is facilitated by the exchange of information, experience, skills, and ideas. It is an important element of the creative industries of the new economy, which can help to compete internationally. Economic development and creativity cannot be seen as opposing forces, one of which is change and the other is tradition, but rather they should be formulated as parts of the same cycle of continuous favorable transformation, with an emphasis on the reverse effects and interdependencies in a holistic system of development. This is the main reason why scholars and politicians pay so much attention to the development of the creative sector.

Creative industries, which include a wide range of sub-sectors and areas, are a dynamic sector of national economies, including the Ukrainian economy with high rates of development. Unfortunately, Ukraine's creative sector currently has little influence on the market, given its low share in both GDP and employment. The importance of national creative industries in terms of exports and imports is an indicator of economic trends in the country, so the issue of improving their competitiveness should be considered and addressed at the political level. One such trend is Ukraine's transformation into a creative economy. The country possesses talented people and creativity, cultural heritage, growing demand for creative content, and technological advances. These advantages can help Ukraine benefit creatively, culturally, economically, and

socially. The results of the study show that more support is needed for the creative industries to strengthen their involvement in the innovation system of the economy and the value-added system.

The modern market economy requires a systematic approach, taking into account possible risks, a critical attitude to the turbulent information space, flexibility, and creativity in finding non-standard solutions that can save the world. In view of the potential of the creative industries, setting them as a priority direction of strategic development will allow Ukraine to ensure an appropriate level of competitiveness in the world arena and reduce the gap with the leading countries of global economic development. First of all, changes will be needed in such spheres as rule-making activity (to fix the important role of culture and creativity in the country's development; to form a sustainable development plan on all levels of government), infrastructure and financing (to support the development of necessary infrastructure and creative hubs), skills, knowledge and markets (to encourage the development of creativity and entrepreneurial skills in the education system), international relations and cooperation. Overtime by developing each of these areas it will be possible to bring the creative industries in Ukraine to a higher level.

Being one of the main goals for the Ukrainian economy, the creative sector can serve as a role model development of entrepreneurship with maximum use of the human factor. In this regard, there is an urgent need to critically understand creative work and examine its status in Ukrainian society. An awareness-raising campaign should begin with the study, development, and implementation of new educational programs to professionalize the new sector and stabilize career trajectories. In order to make informed decisions, it makes sense to examine the role of the creative class in the national social system.

Due to the growing economic importance of the creative industries for Ukraine a significant improvement in national statistics is needed to clarify the theoretical aspects and to obtain the necessary empirical information. The current National Statistical System does not provide the necessary data. For this reason, there are complications that slow down the process of analysis and forecasting in this field. To improve the national statistical system, key aspects, including a coherent system of indicators and data collection (state and local revenues from the creative sector, employment rates, political and institutional framework, diversity of media content, etc.) for the main creative industries in line with international standards should be considered. A standardized statistical database of the creative industries will help strategically develop this sector in cooperation between government, local authorities, private businesses, individuals, and foreign partners.

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## **ПЛАНУВАННЯ ДІЯЛЬНОСТІ СУБ'ЄКТА КРЕАТИВНИХ ІНДУСТРІЙ ДЛЯ ЗАБЕЗПЕЧЕННЯ ЙОГО КОНКУРЕНТОСПРОМОЖНОСТІ В УМОВАХ ТУРБУЛЕНТНОГО СЕРЕДОВИЩА**

Сучасна форма глобалізації визначає нову площину, у якій культурні практики взаємодіють із інноваціями в глобальному масштабі, формуючи таким чином новий сектор економіки – креативні індустрії. Вони охоплюють економічну діяльність, пов'язану з отриманням, використанням, перетворенням, розповсюдженням та комерціалізацією інформації та знань, що мають значний економічний і соціальний вплив (наприклад, стимулювання сталого розвитку та створення інклюзивних робочих місць). Отже, креативні індустрії перетворюються на стабілізуючий елемент конкурентоспроможності країни. Метою роботи є визначення особливостей планування діяльності суб'єктів креативних індустрій в умовах турбулентності сучасного економічного середовища та виділення перспектив посилення їхньої конкурентоспроможності. Методологія цього дослідження вимагає дослідницьких практик, які узгоджуються з перетином креативної економіки, міжнародних відносин, макроаналізу та географії. Вона заснована на вивченні впливу креативного сектора на соціально-економічне середовище в Україні.

Результати дослідження показують, що необхідна потужна підтримка креативних індустрій для посилення залучення їх у систему національного господарювання та процес цілеспрямованого створення доданої вартості. У зв'язку з цим існує гостра необхідність у критичному осмисленні творчої праці та вивченні її ролі в українському суспільстві, а також визначенні її організаційної структури. Підвищення обізнаності слід розпочати з вивчення, розробки та впровадження нових освітніх програм для професіоналізації нового сектору та стабілізації кар'єрних траєкторій. Для того щоб приймати обґрунтовані рішення, необхідно вивчити роль креативного класу в національній соціальній системі.

Перспективи подальших досліджень полягають в оцінці ефективності креативних індустрій України та їх порівнянні з провідними країнами Європи.

**Ключові слова:** культура, креативність, культурні індустрії, креативні індустрії, креативна економіка

**JEL Класифікація:** M14; M3; O47