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FEATURES OF CREATIVE CLUSTERS FORMATION IN UKRAINE

In this article, the definition and concept of the term “creative industry” have been considered. The definition of creative clusters from the point of view of domestic and foreign scientists has been given. A number of creative clusters features have been identified and the own definition of this term has been formed. The experience of developed countries in the formation of creative clusters has been analyzed. The analysis of the population of Ukraine by the indicators of employment, employment by type of economic activity has been conducted. Examples of creative hubs organization in Ukraine have been considered and their economic activity has been analyzed. The main types of creative clusters have been identified and the principles of their formation have been outlined.

JEL: C38; O15; O24

1. Introduction

At the end of the 20th century the world economy has been severely shaken – financial crises, rising unemployment, scarcity of resources due to which traditional industries cease to be national elements welfare. That is why, at the turn of the last century, new, dynamically growing industries, which are designed to overcome, have emerged in the world economy socio-economic problems of regions and countries of the world – creative industries.

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An analysis of the current global trends in the economies of Europe, Asia and the US indicates that there is a gradual reorientation of economies from the material sector to the services sector and to the so-called “creative industries”, which are increasingly bearing in the GDP of developed countries.

The term and concept of “creative industries” first emerged in the UK. In recent years, this concept (and relevant practice) has spread widely around the world and is today one of the most popular innovative ideas relevant to culture and the economy.

There are a number of definitions of the creative industry in the literature that have been proposed, including by UNESCO, the Department of Culture, the media and sports by the UK government and more. All these sources are the basis of the activities of such industries to determine the creation of a creative product. This list includes: advertising, architecture, art and antique markets, crafts, design, fashion, film and video production, programming, including the creation of entertaining interactive programs and computer games, music, performing arts, publishing, television, radio and the Internet (Creative Industries Programme, 2010-2018; Mateos-Garsia, Bakhshi, 2016).

The main indicators of the development of the developed countries indicate that the creative industries are one of the priorities of economic development in the countries of Europe, America and Southeast Asia. While creative industries were initially a crisis tool for Europe, creative programs in Asia have become a “work ahead”, a new lever of influence and positioning on the world stage as the leading modern states. It is part of the strategic development of countries and cities, the opportunity to improve the quality of life and human capital, and at the same time – the path to cultural expansion, the translation of their values and norms.

The creative industries display a strong tendency to concentrate in a small number of locations. In doing so, they form creative clusters – agglomerations of creative businesses and workers that collaborate and compete with each other. This geographical proximity has important advantages: creative businesses are able to tap into a critical mass of creative workers, access clients, and collaborate and share information with one another (Kuznetsova, 2018).

The purpose of the article is to clarify the essence of creative clusters and their influence on the modern economy in the circumstance of transformation.

To achieve the goal, the following tasks were solved:

- to consider existing approaches to defining the concept of “creative clusters”;
- to monitor the foreign experience on creative industries and clusters forming;
- to analyze main labour indicators in terms of creative industries;
- to conduct main principles of creative clusters forming in the modern economy.

2. Literature Review

The issue of clustering of creative industries is poorly understood. A recognized specialist in the study of clusters and the founder of the theory of the same name is the American economist M. Porter. An important contribution in this direction was made by A. Marshall. Valuable theoretical developments in the field of creative clusters are presented in the works of such scientists as J. Evans, J. Hawkins, D. Power, A. Pret, R. Florida, L. De Propris, L. Gipponen, S. Tkalenko, T. Galakhov, A. Chul and others.

Let's consider more detail on the definition of creative clusters given by domestic and foreign researchers (Table 1).

Table 1

Author	Definitions
Kuznetsova N.B.	An independent productive environment (place), that brings together creative entrepreneurs in their territory for free communication, the ability to generate new ideas and create creative products as a cultural product through the combination of technical innovation, creativity and entrepreneurship (Kuznetsova, 2018).
Kowalska K.	A type of cluster structure, based on geographic concentrations of interconnected people or companies to create new product (Kowalska, 2016).
Klasik A.	The structure, that consists of companies, non-profit organizations, cultural and research institutions and special meeting places (such as science parks, cultural centres and media centres) that stimulate ideas exchange between individual artists and scientists (Klasik A., 2008).
Propis L. De, Hipponen L.	Places, that bring together creative people who share an interest in new items, but not necessarily on the same topic; a catalyst place where people, relationships, ideas and talents can "spark" each other; an environment that offers diversity, stimulation and freedom of expression; a dense, open and ever-changing network of interpersonal exchanges that feeds on individual uniqueness and identity (Propis, Hipponen, 2008).
Namyslyak B.	Specific kind of cluster connected with the creative sector (Namyslyak, 2016).
Janine Matheson, Gillian Easson	It is a kind of online or offline space that connects representatives of creative professions (designers, architects, artists, musicians, directors) and art entrepreneurs (Janine Matheson, Gillian Easson, 2019-2020).
UNDP	Geographic networks, where creative and cultural activities are concentrated (UNDP, 2013).
Project "Creative Cities in Ukraine"	A certain environment (building, factory, technopark, etc.) that brings together organizations and enterprises of the cultural sphere of various directions. Due to the combination of many diverse forms of cultural entrepreneurship (theatre, fashion, design or music), such clusters become places of innovation and creativity (Creative Cities in Ukraine, 2020).

Thus, the majority of both domestic and foreign scientists distinguish the following features of creative clusters:

- geographical concentration;
- ability to create new ideas and free communication;

- may include individuals, companies, non-profit organizations, cultural and educational institutions.

Therefore, in this work, under creative clusters we will understand the form of association of individuals, companies, non-profit organizations, cultural and educational institutions by geographical feature, which allows to create effective channels of communication and free space for an exchange of ideas and aimed at creating creative products.

3. Methodology of the Empirical Research

The issue of creative clusters formation in modern transformation circumstances in literary sources and scientists' researches is given considerable attention. Most of the widely used approaches were successfully highlighted. In the article, next variety of research methods were used: analysis and synthesis, induction and deduction, monographic analysis, comparisons, methods of statistical analysis.

4. Findings

The experience of developed countries in the formation of this type of associations allows to conclude that their high efficiency. According to the European Cluster Observatory, there is a total of 28 clusters in the creative sector, which represents 19% of the total number of identified clusters in Poland. For comparison, the highest participation of creative clusters in the EU countries is recorded in the Netherlands and the UK (over 50%).

For example, in UK Creative industries GVA grew by 8.9 per cent between 2013 and 2014 – almost twice as fast as the economy as a whole, while creative industries jobs grew by 5.5 per cent (compared with 2.1 per cent in the UK workforce) (Kuznetsova, 2018). The creative industries are becoming an important component of local economies right across the UK – not just in London and the South-East of England. Agile freelancers and businesses play an important role in the UK's creative innovation system. However, their clusters may experience barriers to growth insofar as smaller businesses may lack resources for R&D and training, or visibility in the eyes of policymakers and universities.

Poland is also one of the countries in Europe, which is characterized by a large number of creative clusters. Only in the period from 2007 to 2013, was Poland able to use over 100 million euros to support cluster initiatives in the framework of the PO Innovative Economy (Florida, 2013). The majority of the creative clusters in Poland (as well as throughout the European Union) represents the knowledge-intensive sector, especially in financial services – 16, and education – 9.

The largest and most developed clusters in Poland are:

- The Cluster of Multimedia and Information Systems “Multi-Klaster”;
- The Media Cluster of Łódź;
- The Printing and Advertising Cluster in Leszno;

- The Mazowiecki Printing and Advertising Cluster “Colorful Basin”;
- The Cluster of Culture and Leisure Industries “INRET”.

In Ukraine, the process of formation and development of creative clusters is only at the stage of formation compared to other developed European countries. In Poland, these clusters were created in the period 2006-2009, and in the UK, which was the first country where creative industries have been created, this happened at the end of the XX century. For comparison, in Ukraine where one of the first steps in this direction was created in 2016 by the cultural and creative industries’ problems development department. However, despite the existence of a power institute, which should regulate these issues, lack of funding, understanding of the essence of the creative industries and specialist creators who would carry out information work with the population; mechanisms of copyright observance and protection, leads to the fact that Ukraine belongs to the outsider countries in the development of the creative sector.

The statistical analysis of the formation and development of creative industries and clusters in Ukraine is difficult, since, unfortunately, the monitoring of these indicators by the state statistical authorities is not conducted. According to the grouping of the classic theory of the creative economy of scientist R. Florida, the creative industries include:

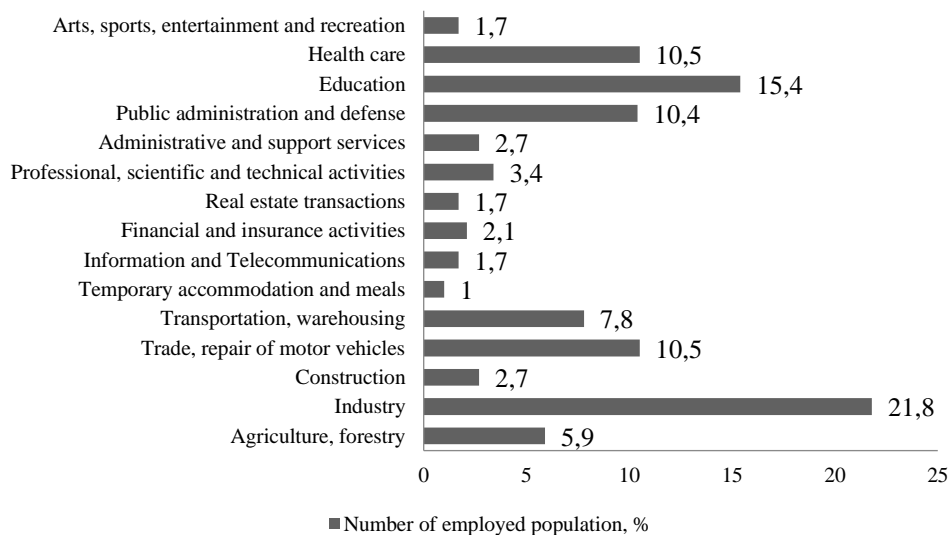
- advertising;
- architecture and design;
- filmmaking;
- book publishing;
- concert and entertainment business;
- software production;
- television, radio and other media;
- creation of video and computer games;
- fashion industry (WIPO, 2015).

Therefore, among the general list of economic activities according to which statistical reporting is conducted, the authors have selected the types that can be attributed to the creative by common world criteria and proposed by R. Florida groups: information and telecommunications; professional, scientific, technical activity; arts, sports, entertainment and recreation.

The analysis of the number of employed population by types of economic activity in Ukraine leads to the conclusion that the highest level is observed in industry and education (21.8% and 15.4%, respectively). In the creative industries, only 6.8% work; this is three times less than in the sphere of material production. For comparison, employment in the creative sector abroad is characterized by significantly higher rates. Due to the information of the World Intellectual property organization (State Statistics Service of Ukraine, 2010-2018), the highest employment rate in the creative sector is observed in the Philippines (11.1%), Bhutan (10.9%) and Mexico (11.1%).

Figure 1

Number of employed people by type of economic activity in Ukraine



Source: research result, 2018 (State Statistics Service of Ukraine, 2010-2018).

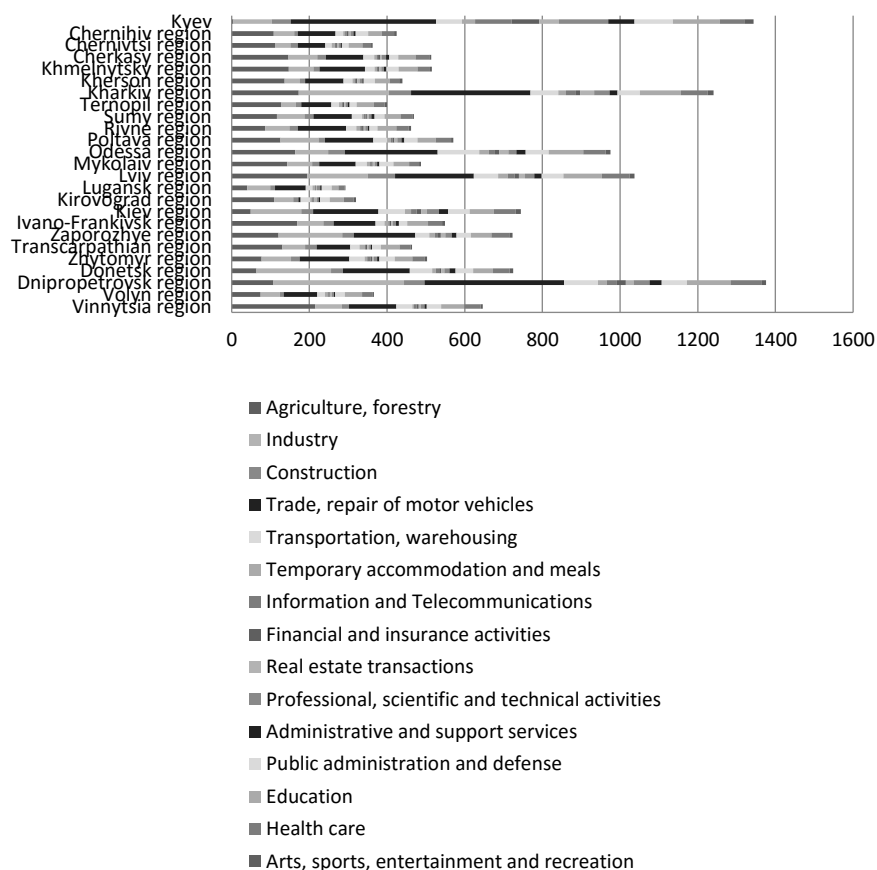
The analysis of employment by type of economic activity in a regional context is quite interesting. Thus, the highest employment rate is observed in the cities of Kyiv, Dnepropetrovsk and Kharkov regions. In the creative sectors of the economy, the largest number of employees is concentrated in the same Kharkov and Dnepropetrovsk regions. Because of their proximity and territorial level of the creative sector, most of these areas have the highest potential for the formation of a creative cluster in Ukraine.

Creating creative potential in the regions is facilitated by new IT and creative centres or hubs. This is still a new phenomenon in some EaP countries, and most of these projects are private initiatives that are practically not supported by public authorities. These hubs demonstrate the dynamic entrepreneurial spirit of creative and business communities that are in line with global trends.

Creative hubs have different shapes and structures. Most of them are physical areas, although they can also be digital platforms and virtual networks and include coworkings, business incubators or accelerators, a “fab lab”, or city labs, but first and foremost, they embody a new community. In many cities, they begin to occupy abandoned downtown buildings, abandoned premises, or former/actual industrial sites and neighbourhoods. By revitalizing and gradually restoring them, these hubs revive the forgotten parts of cities and contribute to the development of cities and regions.

Figure 2

Distribution of the employed population in Ukraine by regions and types of economic population



Source: research result, 2018 (State Statistics Service of Ukraine, 2010-2018).

These are places for work, meetings, training and interaction where knowledge is shared. Creative hubs take on different functions and offer a variety of products and services:

- jobs and offices;
- workshops and seminars;
- mentoring and training;
- business clubs;
- coordination events;

- brainstorming, and more.

The hubs primarily contribute to project implementation, business development, and community building.

Creative industries tend to be highly concentrated in the space, even much more than the rest of the activities. Geographical clusters and hot spots are a usual form of concentration of these industries. One of the main problems for the identification of clusters of creative industries in Europe is the limitation of data. In practice, this has constrained the identification of clusters of creative industries to:

- a) concrete case studies comparing two or more clusters using qualitative approaches, which gives only local evidence and are difficult to replicate for all the EU countries;
- b) the use of NUTS 2 regions, valid to detect very general and vague patterns of clustering, although too large and heterogeneous for the detailed detection of intra-regional and cross-regional clusters. Apart from the identification of global trends, the definition resulting from these data is too vague and incomplete;
- c) cross-country comparisons based on Census data that are equally dependent on the definition a priori of the spatial unit and the laboured coordination of groups of research in several countries.

It is difficult to imagine how many cities and regions are enacting policy strategies based on clusters of creative industries based on vague definitions of their clusters, as well as how many are not aware of the existence of these clusters in their space.

Creative industries have enormous, but often unrecognized potential to support cities in facing the challenges of global competition, convincing investors and creating more and better jobs. CREATIVE CITIES fosters this potential by making European cities aware of the benefits creative industries can bring and supports the development of suitable policies or instruments. The barriers for creative industry actors can be high, ranging from a low capital endowment and poor networking to insufficient external visibility. The project identifies the resources and know-how needed, and provides comparable transnational data on the impact of creative industries on economic growth.

The project has brought together the central European cities of Gdansk, Genoa, Leipzig, Ljubljana and Pécs and has been fostering the exchange of best practice experiences in the fields of creativity and innovation. The project partners first analyzed their local creative industry sectors, working with the UK Department of Culture, Media and Sport. The assessment served as the basis for proposing actions to improve conditions for the creative industry and professionals.

In 2019 (the latest available like-for-like data published by Eurostat):

- Germany is the leading Creative Hub in Europe, with €49 billion of Gross Value Added (GVA) generated by 133,000 enterprises;
- the UK stands at €44 billion generated by 101,000 enterprises, which amounts to 4.6% of the non-financial economy. The UK has the largest creative industries sector in Europe in per capita terms with €700 (vs €605 in Germany and €545 in France);

- France had GVA of €35 billion generated by 158,000 enterprises. This amounts to 3.9% of the non-financial economy;
- together, France, Germany and the UK had €128 billion in contribution from the creative industries in 2011, close to 4% of non-financial GVA of €3,250 billion.

Analyzing Ukrainian experience, it have been noticed that the largest number of such creative centers is also concentrated in Kharkov and Dnepropetrovsk regions, and Kyiv (Table 2).

Table 2

Examples of creative hubs organization in Ukraine

Name	The purpose of the activity
Dnepropetrovsk regions	
Technopark	Development of tourism industry in the region, attracting investors
Innovative Center	Organizing interaction between the community and local governments
Center of innovative Program and Progress	Organization of seminars and business classes on the development of innovative technologies at the international level
creative space «Self Plus»	Organizing the interaction of large groups of people with the provision of the necessary equipment for brainstorming
First regional innovation box	Organization of a platform for the development of small and medium business
Co-working «365»	Startup support organization
I Co-Working Hub	He started his business as an investment fund and incubator and then switched to the resident co-working model, offering appropriate activities and services
Kharkov region	
Project «Spalah»	Joint co-working involving an educational centre
Art factory «Mehanika»	Former shop of the Malyshev plant, transformed into a creative cluster
Fabrika Space	Co-working space
Art area «DK»	Platform for creation of new projects, organization of interaction of different stakeholders
Kyiv	
«Chasopys»	One of the first creative coworkings
« Art factory Platforma»	Former silk factory converted to a creative cluster and the ecosystem that brings together business, festivals, co-working playground, arts, information technology, fashion and education
UNIT City	A large innovation park. Focuses on companies working in the fields of high technology, creative ideas and innovative business. Includes business campuses, UNIT. Factory (a free programming school), sports complexes and cultural, medical and entertainment facilities.
IZONE — platform «ISOLATION» for culture initiations	The Foundation implements projects in Kiev, Eastern Ukraine and abroad in three intertwined areas of activity: arts, education and projects aimed at revitalizing Ukraine’s creative sector. IZONE is a creative community centre that provides working environment, with a particular focus on the creative process of research and production and multidisciplinary. Includes multifunctional facilities, galleries, co-working and art studios, manufacturing facilities and laboratories.

The organizationally creative business began to develop in the form of small and medium-sized enterprises located in the common territory and today is gaining considerable size and importance in the economic and social life of countries.

Thus, according to Alibaba Group chairman Jack Ma, if over the past 30 years, about 6% of companies have benefited from globalization, then in the next 30 years at least 60% of small businesses will become global (Eurostat, 2016).

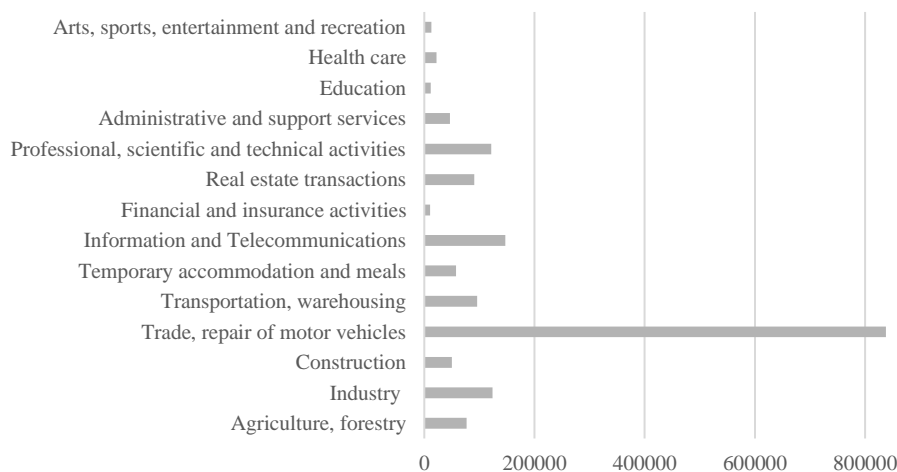
One of the reasons for small business globalism is the intensification and scale of development of the intellectual resource, creative activity of people due to the increase of their level of education, changes in the structure of consumption and employment, which led to the need for the formation of a new market segment of creative products, represented in smallest business entities. Thus, in 2016, in the creative and creative sectors of the EU economy, there were 10,645 enterprises (3.4% of the total service sector), of which 94.2% are micro-enterprises with fewer than 10 people, employing 31.5% persons. The share of big business in the creative industry was only 0.2% of the total number of enterprises (Eurostat, 2016).

Figure 3 presents an analysis of the number of economic entities by type of economic activity in Ukraine.

Most of them are concentrated in trade, which is understandable. In the second place are creative industries – information and telecommunications; professional, scientific and technical activities. The statistics confirm the global trend – the concentration in the creative industries in Ukraine of a large number of small and medium-sized business entities.

Figure 3

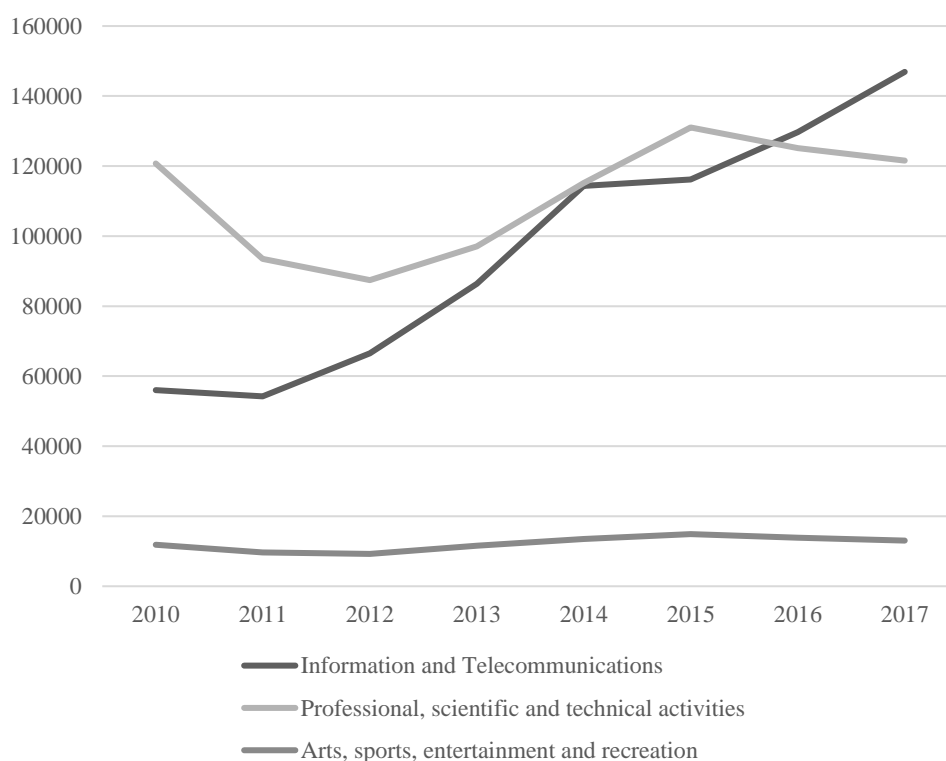
Number of economic entities by type of economic activity in Ukraine



Source: research result, 2018 (State Statistics Service of Ukraine, 2010-2018).

The analysis of the dynamics of the number of economic entities in creative clusters in the last seven years in Ukraine (Figure 4) shows a steady upward trend in the field of information and telecommunications, a slight increase in the field of scientific and professional activity and almost no positive dynamics in the arts, sports, entertainment and recreation. It is the latter sector that has significant development potential.

Figure 4
Dynamics of the number of economic entities in Ukraine in creative industries in 2010-2017



Source: research result, 2010-2017 (State Statistics Service of Ukraine, 2010-2018).

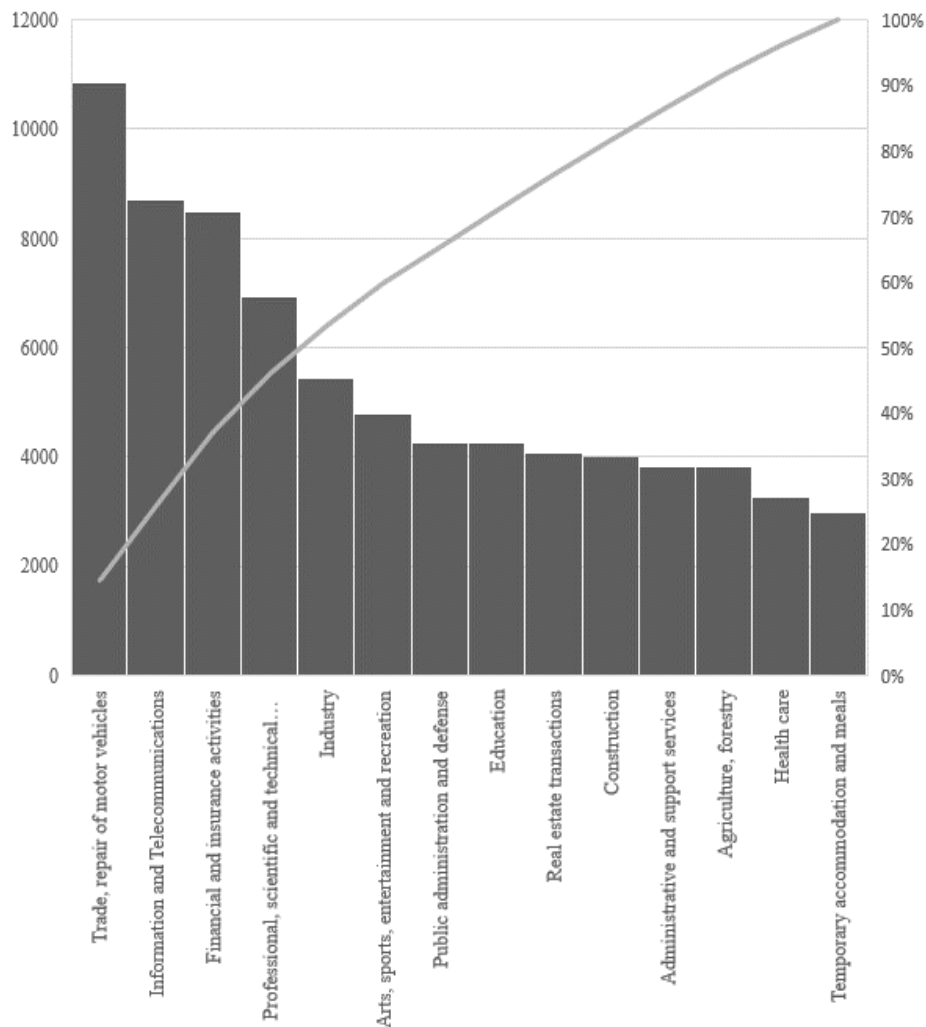
Further analysis of the possibility of forming creative clusters in Ukraine is advisable to make in terms of remuneration for different types of economic activity (Figure 5).

The chart clearly shows that creative industries, such as information and telecommunications, take the first place in the average monthly wage; professional, scientific and technical activities, almost twice the average for other industries.

This situation testifies to the expediency and necessity of involving the workforce precisely in the creative industries, which allow not only to realize the creative potential, but also to provide a sufficient standard of living, attract investments in the region.

Figure 5

The size of the average monthly wage in Ukraine by type of economic activity



Source: research result, 2018 (State Statistics Service of Ukraine, 2010-2018).

5. Discussion

The analysis of statistical data shows the possibility and necessity of forming creative clusters in Ukraine. Kuznetsova N. B. distinguishes four types of creative clusters by their features (Kuznetsova, 2018):

- creative workspaces (zones) from one roof (local media centre or market);
- creative districts in cities (at a designated address);
- regional creative clusters;
- virtual clusters on the Internet.

The most promising and effective, as the experience of developed countries shows, are clusters of the third type, or regional creative clusters. The creation of such clusters must comply with certain principles.

So, Tishchenko O. M. defines clusters as the vector of economic development and proposes the following principles: the principle of territorial localization; the principle of openness in the form of knowledge flow, dynamism and convenience; the economic and process principle of integration in the form of sustainable partnership, cooperation and competition; the principle of having a leading company (core) or integrating product, as well as the principle of influencing small and medium-sized businesses (Tishchenko, 2010).

Movchan I. V. and Chuchina I. M. pointed out that the basic principle of formation of an innovation cluster is the choice of priority directions of scientific and technological and technological development of the economy, a search of territories considering the scientific and innovative potential of objects attractive for solving the set tasks (Movchan, Chuchina, 2011).

According to Mykytyuk N. O., it is advisable to use a systematic approach to the cluster model of economic development, which the author views as a means of economic relations at the regional level. The scientist identifies the following principles necessary for the activity of clusters, in particular, innovative ones, namely (Mykytyuk, 2011):

- unity;
- hierarchy;
- the ultimate goal;
- uncertainties;
- development;
- decentralization;
- functionality.

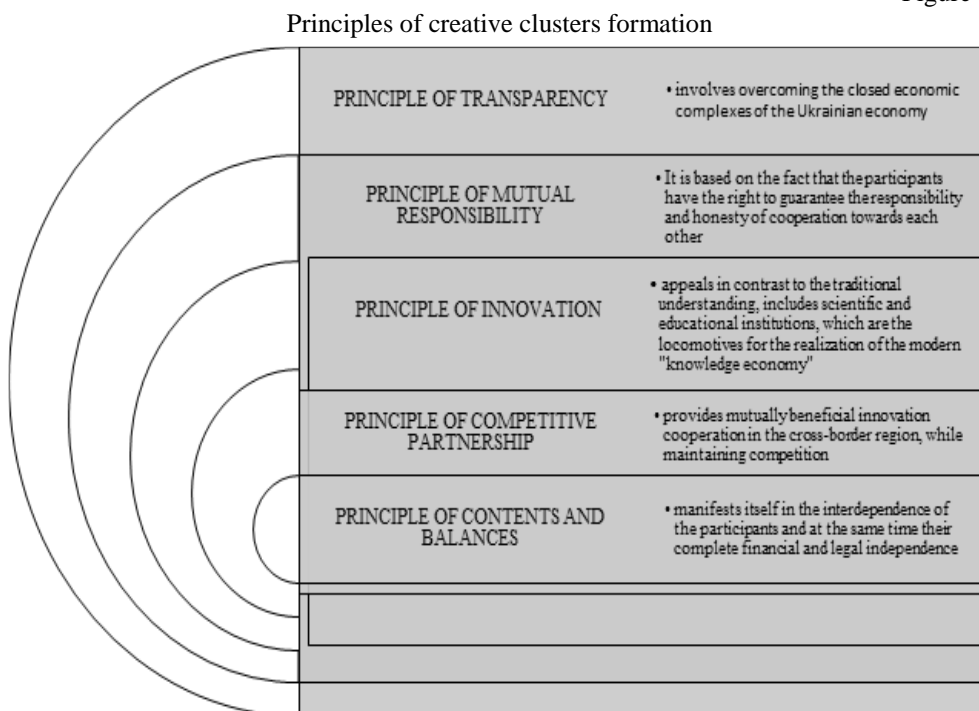
According to O. V. Annanenkova's basic principles of cluster formation are: strategic principles of cluster functioning in the conditions of globalization and principles of state support of cluster structures. Strategic principles of cluster functioning in the conditions of globalization are guided by the strategy of cluster development on the basis of the formation of the most competitive research and production cluster systems. Strategic principles for the functioning of clusters in the context of globalization include the principles of: systematic; compliments; cooperatives; objectivity. The author considers the principles of state support for cluster structures (Annanenkova, 2013):

- targeting of state support for clusters;
- systematic validity of regional clusters;
- integration of centralization and decentralization;
- adequacy.

Shumskaya H. M. notes the need to consider such additional principles of cluster functioning as: the principle of innovation, priority, efficiency and information support (Shumskaya, 2011). The author emphasizes that these principles will allow the cluster’s internal environment to be consistent with an unstable external environment, as well as to further develop the cluster. Moreover, the importance of the above principles depends on the specific activity of the cluster and its regional location.

Smolich D. V. combines the above principles and highlights its “radically new and necessary” principles for cluster formation directly in the context of cross-border cooperation of regions, since the study showed a lack of consideration of a number of aspects of activities and conditions for the formation of cluster entities of this type (Smolich, 2012) (Figure 6).

Figure 6



Source: Karpenko, 2017.

Creative industries as they operate and organizational features tend to clustering, that is, spatial integration. The clustering of creative industries represents is a medium of wide

creative interaction professionals built on complementary and the opportunistic behavior of its participants.

Innovative technologies and ideas are becoming a staple of new economic systems where a special place is played by the creative component, which brings to the fore such factors of production as land and capital, thus overcoming the problem of scarcity of resources.

The creative sector is today the fastest growing in the global economy. International trade in creative goods shows steady growth, which has stimulated its considerable expansion in the last decade.

The clustering of creative industries stimulates the prosperity of the regional economy. Creative clusters are a significant source of budget GDP revenue and growth, create new ones environmentally friendly jobs that attract skilled workforce from other regions, based on rebranding creates an attractive image of the region for both tourists and investments. Cluster form of organization of creative industries manifests positive impact on other sectors of the economy and for social well-being, and the circulation of knowledge in the cluster is the basis for innovative growth component in the region.

6. Conclusions

Analysis of historical origins, theoretical foundations and world practice of clustering of creative industries allowed identify the positive impact of creative clusters to the local and national economies and to identify the main determinants of the creative sector clustering that carry the potential of successful changes in the vector of socio-economic development.

Thus, the study of existing scientific opinions on the conceptual foundations of the functioning of creative clusters made it possible to determine the following provisions for the formation of a new model of creative business profile:

1. Creative enterprises are more effectively developed in community with each other, in places with strong local identity and which are at the same time open to the global world, which differentiates them greatly among other enterprises. They are created both in small cities and in global centres, which subsequently become self-sufficient clusters of creative activity and have a significant impact on their socio-economic development;
2. In the creative sector of the economy a new value is formed when the interaction of technical innovation, creative activity and business entrepreneurship is directed to the creation and distribution of a creative product. Such businesses have the ability to be flexible and adapt quickly to changes in the environment, on which their reputation, skills and brands will depend;
3. The main strategic objective of the creative sector of the economy is pooling of resources and grouping of enterprises into networks, clusters, creative quarters and other types of partnership, which contributes to a larger savings of different types of resources;
4. In terms of their structural content and external infrastructure, creative clusters unite different in the direction and spheres of activity of the enterprise, institutions, creative

platforms, platforms and talented people, which is the basis of creation of creative cities where creative products are consumed and produced, and their external interaction contributes to the formation of a healthy competitive business environment;

5. Creative clusters define the new vector of education system development, ensure the formation of new quality of human resources with critical thinking, flexible to technological change and the potential of creative human capital, promote professional development and realization of talents.

It is the combination of these principles that provides successful clustering of creative industries, avoids problems in the way of formation of local units of interaction between creative entrepreneurs and in the long run, shows a positive effect in the further impact on regional and national well-being.

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