Culture and Creative Industries in Germany

Bernd Fesel
Michael Söndermann

German Commission for UNESCO

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German Commission for UNESCO
Colmantstr. 15, 53115 Bonn

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Authors:
Bernd Fesel, Office for Cultural Policy and Culture Industries, Bonn (Germany). Co-organiser of the National Annual Culture Industries Conference and co-editor of the Culture Industries Yearbook. The Office for Cultural Policy and Culture Industries organises conferences and seminars, provides cultural policy advice and produces culture industries reports. Bernd Fesel is also a lecturer and publicist.
E-mail: info@kulturpolitik-kulturwirtschaft.de

Michael Söndermann, Office for Culture Industries Research, Köln / Zurich. President of the German Cultural Statistics Working Group, Haus der Kultur (Bonn). Member of the Advisory Board of the UNESCO Institute for Statistics, Montreal / Canada. Member of various research groups on culture / creative industries on local, regional and national / European level. He consults ministries and local authorities.
E-mail: soendermann@kulturwirtschaft.de · Web: http://www.connectcp.org

Editing: Dr. Carola Cohen-Friedländer
Translation: Margrit Müller, cultural policy researcher, editor, translator

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Foreword

Over the last few decades, the culture and creative industries have become a major economic force. The creative industries, a complex of eleven economic sectors, aroused a lot of attention in 2006 due to its surprisingly high turnover and growth figures. The culture and creative industries subsequently gained a new importance on the political agenda – in the Lisbon process for the strengthening of economic growth in Europe as well as in the UNESCO Convention on Cultural Diversity, which was ratified by Germany in February 2007. At the beginning of the German EU Presidency in 2007, the German Federal Government placed the issue of culture and creative industries on the agenda of the informal meeting of the European Ministers of Culture in Berlin.

In Germany the creative industries achieved a gross value added of EUR 58 billion in 2004. This equals a share of 2.6% in the Gross Domestic Product. In 2004 turnovers grew by 4.4% compared to the previous year; this is three times higher than the overall growth rate of all economic sectors in Germany, as was stated at the Annual Culture Industries Conference in October 2006.

In November 2006, the report "Economy of Culture in Europe", commissioned by the EU Commission, was presented. According to this report, the gross value added of the creative industries in Europe amounted to 2.6% of the GDP in 2003. This corresponds to a turnover of about EUR 654 billion in 2003. From 2002 to 2004, employment grew by 1.85%, while total employment across the EU decreased. Therefore the creative industries are one of the driving forces of the European economy, with a potential to contribute significantly towards reaching the goal of the Lisbon Agenda to make Europe *"the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion."*

This booklet is therefore a timely contribution to informing the public about the development of culture and creative industries in Germany and about the discussion of the German concept of culture industries, which started about 25 years ago. In this sense the booklet aims at contributing to the emerging Europe-wide discussion. This overview in English of the culture industries tradition in Germany focuses on two issues: on the one hand, it aims at providing a definition of the concept of "culture industries" as it is understood in the German discussion, and on the other it facilitates comparisons of the German culture industries with European and international developments.

This booklet provides the reader with an empirical and a theoretical introduction to the “creative industries” in Germany and in European comparison. The design sector with its particularly dynamic development is highlighted in a special chapter. The booklet also provides an inventory of the culture industries reports issued in the various federal states and cities of Germany between 1992 and 2007. Last but not least, it is evidence for the cultural diversity of Germany in the culture industries sector as well – one of the major objectives of the German Commission for UNESCO. The players in the culture economy – from individual artists to international publishing houses – create more than just economic value. They create a valuable contribution towards the cultural diversity of our society. In October 2006 the Federal Foreign Office organised “Menschen bewegen” (“Moving People”) – a conference on Germany´s Cultural Relations and Education policy, where the promotion of cultural and creative industries played a major role. We thank the Federal Foreign Office for financing the research and publication of this study making this German contribution to the European debate on cultural and creative industries possible.

Walter Hirche
President of the German Commission for UNESCO

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1 Introduction

1.0 Recent International and European Developments – 2007

Across Europe, the culture industries and the creative industries have increasingly been perceived as an economic sector in its own rights. In the UK, a "Minister for Creative Industries" was appointed in 2005, France has set up comprehensive special framework programmes, and in 2006 the European Commission published a 300-page study on the economic importance of the cultural sector. These developments indicate the emergence of important policy strategies with specific focal points and profiles. Public players from China, India and Australia have organised national and international expert conferences on the topic and founded new research institutions specialising on creative industries. More recently, organisations like OECD, World Bank, WIPO, ILO and UNESCO have increasingly addressed the topic. When the European Ministers for Culture and the Media met in Berlin in February 2007, a great number of European states pressed for more emphasis on the topic. For the first time in decades, cultural and creative industries have gained priority on the European agenda – an excellent opportunity to present the German cultural and creative industries to the interested European public.

Culture and Creative Industries in Germany[1]

The creative industries in Germany are a complex of sectors that is more economically powerful than the agricultural or the energy sector in terms of gross value added, but this fact has only started to be widely acknowledged since 2005. The creative industries sector is characterised by the following economic and political features:

1. in 2004, German creative industries achieved a gross value added of EUR 58 billion, equivalent to 2.6% of the Gross Domestic Product (GDP)[2];
2. in 2005 the creative industries were included in the agenda of the German Federal Government;

1 In the following text, the internationally accepted term "creative industries" is used to denote the culture industries in the wider sense. For the definition of culture industries and creative industries see p. 9 and 16f.
2 For comparison: The energy sector achieved 1.5% of the German GDP.

3. a number of German federal states *(Bundesländer)* have issued culture industries (but not creative industries) reports and started to implement policy strategies. In the meantime, almost all *Bundesländer* have produced culture industries reports dealing with the potential of the culture industries of their specific regions in various ways;
4. in 2005, the city of Aachen produced the first municipal culture industries report, followed by Cologne in 2007.

The individual federal states have addressed the topic of culture industries for a number of reasons. While some of them struggle with the effects of structural change and see culture industries as a new key industrial sector, others simply strive to develop the employment potential of their culture industries. The culture industries are no longer perceived as a matter concerning just urban regions, they can develop in the most diverse economic contexts. This is, by the way, not just the hope of German *Bundesländer*, but also of many other regions (from Ireland to Sicily and from Portugal to Estonia) outside of the metropolises of Europe.

The German Federal Government and the German Parliament – as well as the European Commission – have a great variety of expectations of the creative industries. Consequently, political competencies are extremely wide-ranging: departments for economic affairs (e.g. in the case of support to the film industry) or departments for the support to regional and structural development or those responsible for copyright law or foreign cultural policies may all be in charge. The newly gained importance of the culture industries leads to the involvement of more and more players, nationally and internationally, on the level of municipalities, regions, national states and on a European level.

This booklet aims at providing basic information about the "Creative Industries in Germany" for the various players in policy making and administration in Europe.

1.1 Culture and Creative Industries in Germany: Definition and Economic Importance

The culture industries and the creative industries are an expanding complex of economic sectors. In 2004, turnovers in the creative industries in Germany increased by more than 2% compared to the previous year. For comparison: the automobile industry achieved a growth of 0.3%, the chemical industry of 3%. Germany is not the only country to register an increasingly dynamic development of the creative industries – other European countries experience the same trend.

Therefore the European Union wants to support the creative industries as an expanding sector of the economy, as Jan Figel, EU Commissioner for Culture, announced after a meeting of the European Ministers for Culture in Berlin. Aspects related to culture in general and to the culture industries in particular are to be increasingly considered across all policy areas within the European Union. A plan of action, based on an independent study, is to be developed accordingly. In spite of, or perhaps because of, its newly gained importance, the debate on appropriate definitions of cultural and creative industries has only just started.

In Germany, widely agreed definitions and concepts have been developed in national debates over many years, also considering discussions at the international level. These concepts are characterised by three aspects:

1. Core area: nine culture industries sectors

Over the last ten years, a core area of nine sectors[3] has been identified to define culture industries in Germany. It has been applied in all German studies, but also in European reports, e.g. in France or in the European Commission.

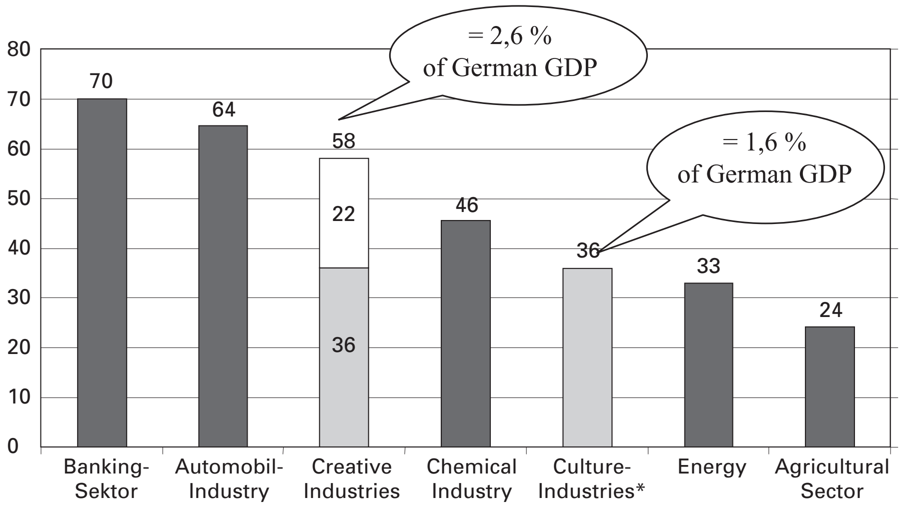
The concept of creative industries as it was developed in the Anglo-Saxon context is not derived from the French/German core area of culture industries – even though it embraces that area. Studies in the UK, for example, focused more on the design sectors, the new media and innovative economic developments in general, like advertising and games. This was also corresponding to the focus these sectors had in the UK.

3 For a detailed list of all sectors, see p. 16f.

The following paragraphs compare the economic importance of the culture industries, according to the definition that was developed in Germany since 1992, and the creative industries, a term which became generally accepted in the international context. It will become clear that the culture industries occupy a vast core area within the sector of creative industries.

The **culture industries in Germany,** comprising a core area of nine cultural sectors, contributed a total of EUR 36 billion to the gross value added in Germany in 2004. Its share in the gross domestic product (GDP) amounted to 1.6%, placing it higher in the ranking than the energy sector (1.5% of GDP) and the agricultural sector (1.1 of GDP).

Contribution of culture and creative industries towards gross value added in billion, in Germany, by sector, 2004



*excluding public cultural institutions (= 6 billion EUR)

The estimates for the cultural and creative industries are based on national accounting data.
Source: Destatis, estimates by M. Söndermann/Arbeitskreis Kulturstatistik e.V. 2006

The term "creative industries", which is commonly used in the international discussion, includes the advertising industry and the manufacture of software and games into the mix of culture and creativity related sectors, leading to a tremendous increase in its overall volume. The international concept of creative industries was applied to the empirical data on cultural sectors in Germany for the first time in 2006[4]. It was established that the gross value added achieved by the **creative industries in Germany,** i.e. the nine core areas (EUR 36 billion) plus the newly integrated sub-sectors of advertising and manufacture of software and games (EUR 22 billion) amounted to a total of EUR 58 billion.

The share of the creative industries in the Gross Domestic Product amounts to 2.6% and ranges between the chemical industry (EUR 48 billion; 2.1% of GDP) and the automobile industry (EUR 64 billion; 2.9% of GDP) in the ranking of economic sectors in Germany according to their share in the GDP. The chemical industry grew by more than 3% in comparison to 2003, while the gross value added in the automobile industry remained on a rather stagnant level, at a low 0.3%.

2. Identity across sectors

Culture industries sectors are characterised by their cross-sectoral quality; the culture industries cut across a diversity of economic sectors, including the production as well as the service and distribution sector. In this respect they are fundamentally different from traditional industrial branches like the automobile or chemical industries which can be described as homogeneous branches of the production sector.

3. Affinity to media and IT industries

Finally, the culture industries are related to the media and IT industries, which can likewise only be described as cross-sectoral economic complexes.

4 3rd National Annual Conference, 2006. Source: Arbeitskreis Kulturstatistik (Cultural Statistics Working Group), see also www.kulturpolitik-kulturwirtschaft.de, www.kulturwirtschaft.de

1.2 Economic Importance in the European Context

The introduction of the international concept of "creative industries" into the German discussion facilitates the comparison of German and international creative industries. Naturally, the discussion on the international role of the creative industries is still in its beginnings in Germany – at least as far as the perception of the overall sector is concerned. "Creative industries" was one of the new areas of foreign cultural policy discussed at the occasion of a conference on foreign cultural and educational policies only recently, in October 2006, in the Federal Foreign Office. The fact that Germany is a business location for cultural and creative sectors shall in future be integrated into the promotion of the image of modern Germany abroad.

Individual sectors of the creative industries – film, music, design, literature or visual arts – have been active on the international stage for decades. Furthermore, leading international marketing events of literature, film or visual arts are based in Germany, e.g. the Frankfurt Book Fair, the Berlinale, Art Cologne, the *art forum* or the Typo, the Music Fair at Frankfurt or the Games Convention at Leipzig, to name just a few.

A data comparison of gross value added in the creative industries across Europe shows that industries do not only in Germany contribute greatly to economic development. According to OECD data, the value added of the national creative industries in France (EUR 48 billion) and the UK (EUR 63 billion) is comparable to that in Germany in 2003. According to the Austrian Creative Industries Report, the value added in Austria amounted to EUR 6.6 billion; for Switzerland the Canton of Zurich provides a figure of EUR 8 billion.

Gross value added by creative industries in 2003

Country	Total billion EUR
United Kingdom	EUR 63 billion
Germany	EUR 58 billion
France	EUR 48 billion
Switzerland	EUR 8 billion
Austria	EUR 6.6 billion

Source: Michael Söndermann

2 Culture and Creative Industries in Germany

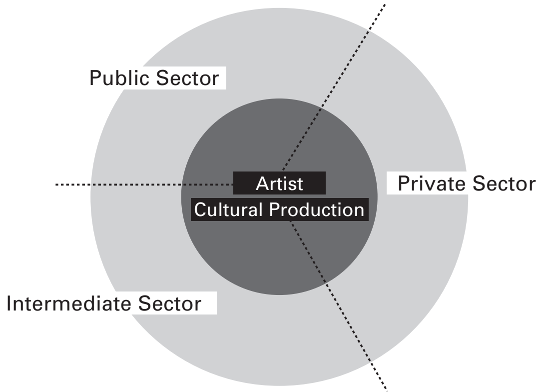
This chapter deals with the various national definitions of culture industries and creative industries and explains the differentiation between the sectors of cultural and creative industries.

2.0 Perception of Culture Industries / Creative Industries

Economic and cultural diversity is one of the greatest strengths of German culture industries. Economic studies have shown that all cultural sectors are increasingly characterised by an above-average number of small and very small or one-person enterprises. This tendency seems to have been facilitated by the use of new cost-efficient technological equipment and means of production in the cultural sectors. This trend went hand in hand with a **growing public perception** of cultural industries, which has meanwhile also led to the **enhancement of the status of independent cultural professions** (artists / cultural production). Cultural programmes of private providers and services of independent offices, studios, and artists' agencies have been acknowledged as an important factor for the cultural diversity and attractiveness of cities and regions. They form the economic core of the culture industries. The interlinking of artists, cultural production units and culture industries creates employment and value added. The multi-faceted network of diverse cultural fields fosters a new perception of the cultural or creative sector.

The recognition of the crucial role played by independent cultural professions acting in a diversity of sectors led to the development of a three-sector-model of the cultural sector.

The Swiss three-sector-model of the cultural sector



Source: Erster Kulturwirtschaftsbericht Schweiz 2003 [First Culture Industries Report Switzerland 2003]; edited by: University of Art and Design, Zurich

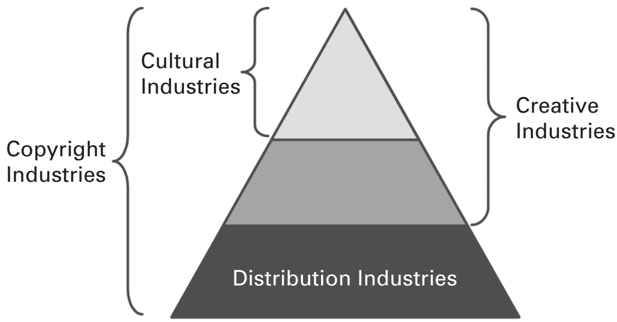
According to the Swiss three-sector-model, the cultural sector is divided into a core area of artists / cultural production and a peripheral surrounding area comprising the public, the intermediate (non-profit) and the private (market-oriented) sub-sectors. While the first two sectors belong to the field of "non-profit oriented culture", the third sub-sector is seen as "profit-oriented" or "commercial" culture, and this sector is denoted as "culture industries". The sub-sectors are connected by a "capillary" system of mutual exchange. The culture industries are built on the creativity potential of the public and the not-for-profit cultural sectors and provide innovative feedback – at least under ideal conditions. One of the most important characteristics of the culture industries sector is its openness. The special strength of free lance workers and small enterprises lies in their ability to absorb cultural trends and react quickly to market changes, and this is of fundamental importance for the culture industries. This is the reason why there are many cross-sections and interfaces with neighbouring or larger sectors, for example with the "creative industries" (especially according to the definition developed in the Anglo-Saxon context).

Consequently, political and scientific research is charged with the task of analysing the dynamic system of functional fields in the cultural sector in order to come up with a sustainable contribution towards growth and employment on the local and regional level in Europe.

The “creative industries” model represents an international comparison of culture and creativity as economic factors, requiring constant research and observation of current developments in cultural and creative markets. In this sense, creative industries can be defined as cultural industries in a wider sense.

The “Singapore Model”, currently discussed on an international level, goes one step further and constructs an overall complex of copyright industries which include the cultural and creative industries among other sectors. The concept of “creative economy” has also played a major role in the international discourse among experts. The ideas of Richard Florida go far beyond these sector-oriented discussions as he develops his concept of a “Creative Class” which he assumes to embrace already a third of the total North American labour force.

Singapore Model of Creative Industries



Source: Ministry of Trade and Industry, Singapore 2005

2.1 Definition and Differentiation

The concept of culture industries comprises all enterprises and self-employed persons whose economic activities focus on the production, dissemination and intermediation of artistic and cultural products or services. In other words: all sub-sectors and market segments that are related to **"culture in a wide sense",** e.g. music industry, publishing industry, arts, film industry etc. This embraces individual artistic ideas or original works of art, products of the applied arts, the trade of art works and products of popular culture, even the dissemination of cultural goods and services through the mass media.

The culture industries include, for example, **all market-oriented economic enterprises** like music ensembles, sound studios, record labels, publishing houses and the production of sound storage media, book and music dealers, art dealers and galleries, concert agencies, film actors, film producers and cinemas, architectural offices and design studios, artists' studios, offices of authors and journalists, agencies for cultural services etc.

In the broadened concept of creative industries the creativity aspect becomes the most important point of reference for sector specific products and services. Artistic / cultural ideas and popular products combine with technological, innovative and scientific creativity. Culture industries sub-sectors are integrated into larger market-oriented creative complexes together with other business areas like advertising, multimedia, or the manufacture of software and games. In this concept, the culture industries form the core of the creative industries. The latter are, again, integrated into the still larger complex of copyright industries.

These eleven economic sectors are grouped according to statistical criteria; they can also be re-grouped and sorted by individual sectors according to market segments, e.g. music industry, book market, art market etc. This leads to the formation of ten market segments (e.g. because the group "retail trade of cultural goods" is broken up and assigned to the respective market segment).

The following summaries of basic statistical data on culture and creative industries are based on evaluations or estimates of official economic statistics of the German Federal Statistical Office (Destatis) and the European Statistical Office, EUROSTAT.

I. The core sectors of the cultural industries include:

- the **publishing industries** (book publishing houses, newspaper publishers, publishers of phonographic records and music);
- the **film industries** (film, TV, video production, distribution, cinemas);
- **broadcasting industries** (private radio/television);
- **music, visual and performing arts** (independent artists, private theatres, cabaret and variety theatres, theatre and concert agencies, technical stage enterprises);
- **journalists / news agencies;**
- **museum shops, arts exhibitions** (commercial museum activities and arts exhibitions);
- **retail trade of cultural goods** (music stores, book stores, galleries, art trade);
- **architectural offices** (interior, garden, design, building and civil engineering architects);
- **design industries** (industrial, product, fashion, textile and similar design).

II. The creative sectors to be included in the new concept are:

- **advertising** (advertising agencies etc., excluding advertising design);
- **manufacture of software/games** (development of software, games including consultancy, excluding hardware and data processing services).

I.+II. Creative Industries = 11 economic sectors

2.2 Sector Turnovers and Numbers of Enterprises, 2000 – 2004

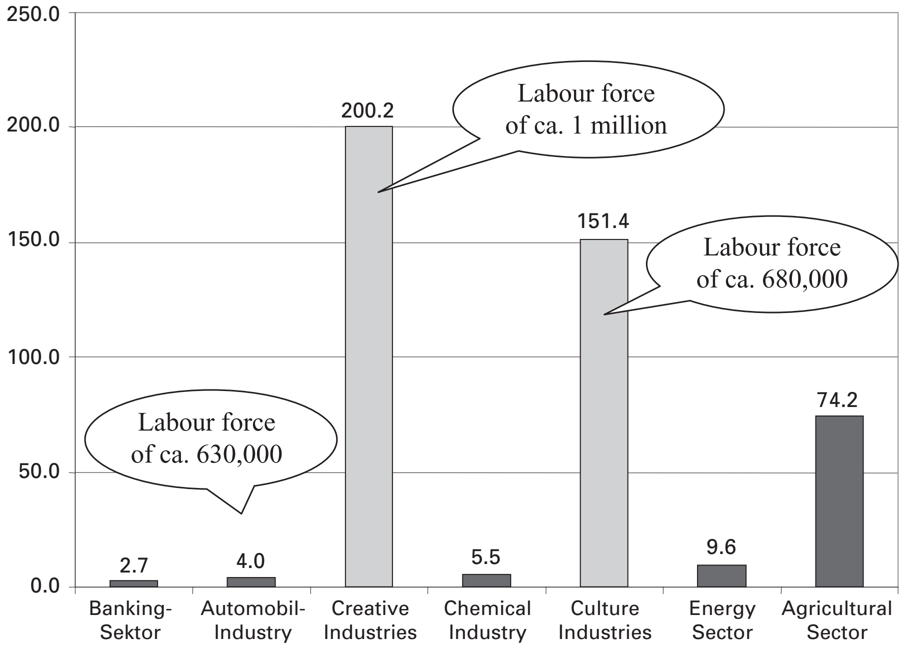
This chapter compares the creative industries with other economic sectors, like the chemical industry or the energy sector. Subsequently the economic trends in individual sectors of the culture and creative industries, differentiated by turnovers (not by value added like in Chapter 1) and numbers of enterprises are described. The chapter closes with a list of open research questions in connection with the creative industries.

2.2.0 General Overview

In 2004, the number of independent cultural offices and enterprises in the German culture industries had risen to a total of 151,400; they produced a total turnover of EUR 82 billion. Accordingly, the percentage share of cultural professions / enterprises in the total number of enterprises in Germany amounted to 5.1%, the share in the overall turnover of the entire economy to 1.9%.

If the manufacture of software and games is included into the wider concept of the creative industries, the comparative figures rise considerably: 200,200 self-employed persons and taxable enterprises of the German creative industries produced a turnover of EUR 117 billion in the same year. The share of creative industries enterprises amounted to 6.8%, that of turnovers to 2.7% of the total German economy.

Number of enterprises in culture and creative industries in Germany, by sector, 2004



Source: Destatis, calculated by M. Söndermann/Arbeitskreis Kulturstatistik e.V. 2006

The comparison with established industrial sectors shows that the creative industries can no longer be seen as an unimportant market existing in an economic niche, as has already been demonstrated by the figures on gross value added in the introductory chapter.

However, the creative industries are still fundamentally different from the traditional industrial sectors. While the traditional industries show strong monolithic structures and concentration trends leading to the existence of only a couple of thousand firms – there are, for example, only 4,000 to 5,500 firms in the chemical and the automobile industries – the structure of the creative industries is characterised by an exceedingly high share of one-person, micro or very small enterprises.

It is estimated that 98% of all firms in the creative industries belong to the group of very small enterprises (with turnovers of up to EUR 2 million per year), and that they achieved almost one third (29%) of the turnover volume of the creative industries in 2004. Small and medium size enterprises (SMEs) (turnovers of EUR 2 million to EUR 10 million per year) had a share of 1.5% of all enterprises and achieved a share of 26% of the turnovers, while the “majors” (annual turnovers of more than EUR 100 million) represented less than one percent of all enterprises while their share in the turnover volume amounted to 45%.

The economic and employment potential of the creative industries has meanwhile become equal to that of traditional industrial sectors. The strength of the creative industries is based on their employment potential and on their flexible structure due to one-person enterprises and free lance offices, more and more of which push into the cultural markets, as has been shown by various empirical studies. If 10% of the micro businesses employed just one additional person, 20,000 new job places could be created.

The weakness of the creative industries lies in the undeveloped economic potential of the very small enterprises, many of which are not able to finance more than the job position of a single entrepreneur. This trend is true for all regions of Germany. Due to the weak value added in the creative industries, the creation of job positions that are liable to social insurance deductions has now come to a standstill – and job creation is still the ultimate criterion for economic and employment policy makers.

2.2.1 Development of Turnovers

In 2004, the creative industries achieved an annual turnover of EUR 117 billion. After three years of recession, Germany's creative industries regained growth rates

Turnover of the culture and creative industries, 2000 – 2004

	Turnover of enterprises			Change	
Economic sectors	2000 million	2003 million	2004 million	2004/00 in %	2004/03 in %
Publishing industries, phonographic industries	40.918	36.974	36.851	-9,9	-0,3
Film industries, TV production	10.000	7.223	6.897	-31,0	-4,5
Broadcasting / TV companies	8.614	7.656	7.880	-8,5	2,9
Performing / visual arts, literature, music	5.678	5.558	5.759	1,4	3,6
Journalists, news agencies	1.667	1.865	1.808	8,5	-3,1
Museum shops, arts exhibitions etc.	432	521	542	25,4	4,1
Retail book trade, newpapers (50%)	3.980	3.791	3.815	-4,1	0,6
Architectural offices	8.275	7.058	6.734	-18,6	-4,6
Design offices*	13.239	10.855	11.563	-12,7	6,5
I. Culture Industries	**92.804**	**81.503**	**81.849**	**-11,8**	**0,4**
Including the creative sectors of advertising and software / games					
Advertising (only 74.402)	16.491	13.828	13.771	-16,5	-0,4
Software/Games	17.675	19.288	21.485	21,6	11,4
II. Plus creative sectors	**34.166**	**33.115**	**35.255**	**3,2**	**6,5**
I.+II. Creative Industries	**126.970**	**114.618**	**117.105**	**-7,8**	**2,2**
All economic sectors (A.-O.)	4.152.927	4.248.074	4.347.506	4,7	2,3
Share of Culture Industries in overall economy	2,2%	1,9%	1,9%	-	-
Share of Creative Industries in overall economy	3,1%	2,7%	2,7%	-	-

*The design industries include industrial, product and communication design.
Source: Destatis, calculated by Michael Söndermann, Arbeitskreis Kulturstatistik e.V. 2006

like in the 1990ies. The total turnover of all eleven creative industries sectors rose from EUR 114.6 billion in 2003 to EUR 117.1 billion in 2004.

This equals an average growth rate of 2.2%. In the design industries, turnovers grew at an above-average rate of 6.5%; in the software and games industries they grew by 11.4%. Negative growth rates were experienced by film and TV productions (minus 4.5%), architecture (minus 4.6%), journalism (minus 3.1%) and the publishing industries (minus 0.3%).

While the "traditional" sectors of the culture industries, having experienced a tremendous loss of 11.8% until 2003, remained at least static in 2004, design and software / games became the new growth sectors of the creative industries. Between 2003 and 2004, the design sector grew by 6.5% and the software / games sector by 11.4%, raising the overall growth rate of the creative industries to almost the level of the overall economy in Germany – the creative industries grew by 2.2%, the overall economy by 2.3%. To regain the share in the overall economy they used to have in 2000, the creative industries would have had to grow at a still faster pace, achieving an additional turnover of EUR 17 billion. In 2000, the share of the creative industries in the overall economy amounted to 3.1%, in 2004 only to 2.7%.

2.2.2 Development of Small Scale Enterprises and Firms

In 2004, the German tax authorities registered more than 151,000 taxable enterprises in the cultural industries. The figure includes freelance artists and journalists with an annual turnover of EUR 17,500 and above. The majority of these enterprises are run by individual entrepreneurs or free lance professionals in the cultural sector. There are also a number of small enterprises with 2-5 employees and a few medium-size enterprises, e.g. book publishing houses or phonographic companies. The number of free lance workers who stay below an annual turnover of EUR 17,500 and are therefore not registered by the tax statistics is estimated at 210,000.

No. of enterprises and entrepreneurs in culture and creative industries, 2000 - 2004

	No. of enterprises / entrepr.			Change	
Economic sectors	2000 abs.	2003 abs.	2004 abs.	2004/00 in %	2004/03 in %
Publishing industries, phonographic industries	9.375	9.356	9.544	1.8	2.0
Film industries, TV production	7.535	8.134	8.225	9.2	1.1
Broadcasting / TV companies	751	826	839	11.7	1.6
Performing / visual arts, literature, music	35.008	35.305	36.672	4.8	3.9
Journalists, news agencies	12.441	13.931	14.910	19.8	7.0
Museum shops, arts exhibitions etc.	1.096	1.187	1.242	13.3	4.6
Retail book trade, newpapers (50%)	8.191	7.712	7.698	-6.0	-0.2
Architectural offices	38.727	36.789	37.233	-3.9	1.2
Design offices*	30.897	32.893	35.029	13.4	6.5
I. Culture Industries	**144.021**	**146.133**	**151.392**	**5.1**	**3.6**
Including the creative sectors of advertising and software / games					
Advertising (only 74.402)	20.059	18.231	17.977	-10.4	-1.4
Software/Games	21.482	27.633	30.783	43.3	11.4
II. Plus creative sectors	**41.541**	**45.864**	**48.760**	**17.4**	**6.3**
I.+II. Creative Industries	**185.562**	**191.997**	**200.152**	**7.9**	**2,2**
All economic sectors (A.-O.)	2.909.150	2.915.482	2.957.173	1.7	1.4
Share of Cultural industries in overall economy	5,0%	5,0%	5,1%	-	-
Share of Creative Industries in overall economy	6,4%	6,6%	6,8%	-	-

*The design industries include industrial, product and communication design.
Source: Destatis, calculated by Michael Söndermann/Arbeitskreis Kulturstatistik e.V. 2006

Architects' offices (37,200) and performing /visual arts studios /offices including music (36,700 studios, offices and companies) form the largest group of cultural enterprises, followed by designers (35,000) and software / game developers (30,700). The number of enterprises rose by almost 8% between 2000 and 2004; growth rates of 10% and more were experienced by the software / game developers, journalist and design offices and the museum shops / arts exhibitions. The number of (small) broadcasting companies grew by almost 12% during the same period. The number of enterprises in book retail trade and the number of architectural offices continued to decrease in the period under review; their negative growth rates range between minus four and minus six per cent. The number of enterprises in the advertising industries, including advertising agencies, decreased by even ten per cent.

Overall, the development of enterprises in the culture and creative industries took a positive turn in 2004 as compared to 2003. The share of new small enterprises entering the cultural market amounted to 3.6%; in the fast growing sector of software / games development their share amounted to even 4.2%. The number of enterprises in the creative industries grew three times faster than the overall average number of enterprises (1.4%) and arrived at a new record number of 200,000 enterprises.

2.2.3 Future Trends: Structural Indicators and Questions

Worldwide, the most exciting processes are taking place in the cultural and creative industries in 2006/2007. The developments in the book and publishing industry and on the Internet, in music industry and digitalisation, in the visual arts and multi media technologies, or in the film and audiovisual industries give an inkling of things to come – especially to those countries, regions and cities that wish to design their own future. The creative industries are a strongly "fragmented industry" which is mainly active in national or regional markets, as has been shown by a multitude of studies.

The most important structural characteristics of the culture and creative industries include:

- culture/creative industries are **independent economic fields** geared towards the production / provision of cultural and creative content;
- different from monolithic industries like the chemical industry, the cultural/creative industries consist of diverse sub-sectors and markets (music, book market, art, film design, software). They are **business complexes composed of diverse sectors.**

The culture / creative industries **focus on the production of content and copyrighted material,** while Information Technology and Media Industries concentrate on information and communication technologies (telecommunications services, data bases, data processing etc.) and are mainly concerned with technologies and hardware. Content production plays only a minor role the IT industries, mainly in the form of supply services.

The culture / creative industries are characterised by an **extremely small-scale business structure.** On average enterprises employ not more than 5 persons; the corresponding figures in traditional industrial sectors, e.g. the chemical or the automobile industries amount to an average of up to 128 persons. However, the overall creative complex has now reached a greater job potential than the traditional industrial sectors.

The business structure of the creative industries – a great diversity of market segments and fragments together with a multitude of small-scale players – creates the following frame conditions for the players in all sectors:

1.) Players in the creative industries are mainly price takers: they are forced to "take" the prices that result from supply and demand. None of the players has enough market power to "dictate" prices to the customer (price makers). Actors that are powerful enough to become price makers are usually called "majors".
2.) In a market that is fragmented and characterised by a great number of players, it is usually difficult to gain an overview – for buyers as well as for sellers. **The costs for retrieving information are high.** It is difficult to gain information on all relevant participants in the market or to know their approaches and activities. For the individual player it is complicated and expensive to assess the market and its trends.[5]

The culture / creative industries have three different layers. The first layer consists mainly of micro enterprises and free lance offices. This is where we find the cultural and creative scene, people who experiment with creativity. This segment is sometimes called "cottage industry" in English, in German it is occasionally referred to as "humus economy" *[Humuswirtschaft]*. The second layer consists of small and medium sized enterprises (SMEs) which form the backbone of the culture / crea-

5 Colloquially, this is often called "market intransparency" and blamed on the players. This judgment is, however, misleading. Market transparency cannot be created or changed by the players; it is a structure inherent to the market that can only be changed by policy measures or joint action.

tive industries and grant employment and value added. The third layer includes the so-called majors (big companies) who gain market power through the global marketing of products and services produced by the SMEs.

The culture / creative industries are a **high risk sector** with extremely variable market chances. This is true for global culture /film productions as well as for local culture / creative scenes or SMEs acting on a regional level.

The culture / creative industries are characterised by a **peculiar mixture** of technological and non-technological innovation. On the one hand, they are strongly driven by technological innovations, on the other hand they are also "laboratories and fields of experiment" of so-called non-technological innovation and promote rapid changes in fast-moving branches (especially in the internet business).

Culture / creative industries can be located in urban metropolises as well as in structurally weak regions as their requirements towards **business locations** take a great variety of shapes. In this respect they differ from the IT and media industries which are usually located near the few broadcasting or telecommunication centres.

The culture / creative industries have no or only a **very weak lobby** in society, politics and administration because they represent a new type of "key industry". Here it is not important to create a conducive environment for the top five or ten major companies which will subsequently be beneficial for the entire sector. It is more important to create adequate conditions for the development of thousands of creative offices and cultural enterprises and enable them to increase their potential of value added. This requires an entirely new perspective on the market realities to come.

Despite a growing number of culture industries reports, many questions concerning the culture / creative industries have not been satisfactorily addressed:

- What are the tensions the culture / creative industries have to endure facing media, IT, copyright and technology development?
- Who is the right political partner to address? Is it the department of culture, trade and industry, city development, education, technology, or finance – or are all of them responsible?
- Do the culture / creative industries have to defend themselves against the reproach of trivialisation coming from cultural institutions or are they equal partners in artistic and creative production?

- What is the most important part of the creative industries complex? Do micro businesses and free lance offices provide the "humus" to produce and grant creativity? Or do the SMEs form the backbone of the cultural and creative sectors? Or is it once more the orientation towards the majors and media corporations that counts?
- This raises the question of the kind of capital that is crucial for the creative industries. Who needs how much "symbolic", how much "social" and how much "economic" capital (Bourdieu)?
- What are adequate financial support instruments when the funds needed for the support to the culture / creative industries are significantly smaller than in the case of the traditional industrial sectors?
- To what extent can substantial non-financial support instruments be used in the case of the culture /creative industries?
- How can the culture /creative industries benefit from their "capillary" relationship with the public and intermediate cultural sector?
- How may the culture / creative industries initiate new developments in the public and the intermediate sector?
- What kind of environment and infrastructure do the culture / creative industries need for development?
- What can be done to reduce the high costs involved for retrieving information in a highly fragmented market, thus contributing to the profitability of the culture / creative industries?
- What can be done to raise incomes in the culture / creative industries? Can the enterprises become price makers instead of price takers in spite of their small scale structure and thus gain higher profit margins?
- Are there new forms of interaction between work and leisure, business, innovation and creativity that might support the culture / creative industries?
- Are the culture / creative industries capable of developing original and unique cultural products and creative services with sustainable effects?

These and similar questions concerning the development of the sector and the activities of individual players come from a variety of perspectives and scientific approaches. Consequently, future research on the culture and creative industries will have to be interdisciplinary.

A lot of phenomena in the culture industries are not subject to short term development trends – the most popular, but still valid example is that of the belated discovery of an artist after decades of unsuccessful struggle. In order to understand such processes – example: the sustainable development of incomes – long-term studies and project-independent research is required.

2.3 Sector in Focus: the Booming Design Industry

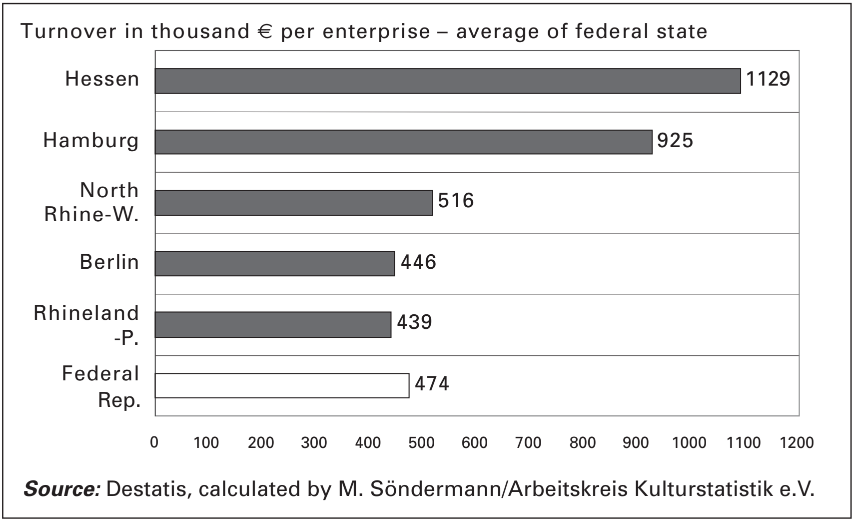
The turnover of the German design industry increased by 6.5% between 2003 and 2004: this is the highest growth rate of all culture industries in Germany and an excellent reason to provide a national overview of the development of the design industries.

In 2004, the core sector of German design industries[6] was made up of about 35,000 enterprises producing a total turnover of EUR 11.6 billion. The majority of enterprises consisted of individual entrepreneurs or free lance design offices. The average annual turnover per design office or enterprise amounted to EUR 330,000 (not including VAT). The local distribution of design industries was approximately the same as that of German industrial enterprises in general, with local centres in North Rhine-Westphalia, Bavaria and Baden-Württemberg (shares between 15 and 23%).

Many of the most successful design enterprises (in terms of turnovers achieved) are situated in areas of urban agglomeration, for instance in Hessen (Rhine / Main area), Hamburg (metropolitan region) or North Rhine-Westphalia (Düsseldorf); these are mainly enterprises with a high need for close customer contact (in particular communication design). There is, however, an astonishing agglomeration of successful design enterprises in the structurally less developed areas of, for instance, Saxony-Anhalt, Schleswig-Holstein, Brandenburg or Thuringia. These companies specialise on the design of industrial products whose national or international markets are less dependent on close customer contact.

6 Core area of selected design sectors: industrial, product and communication design.

Communication design, 2004

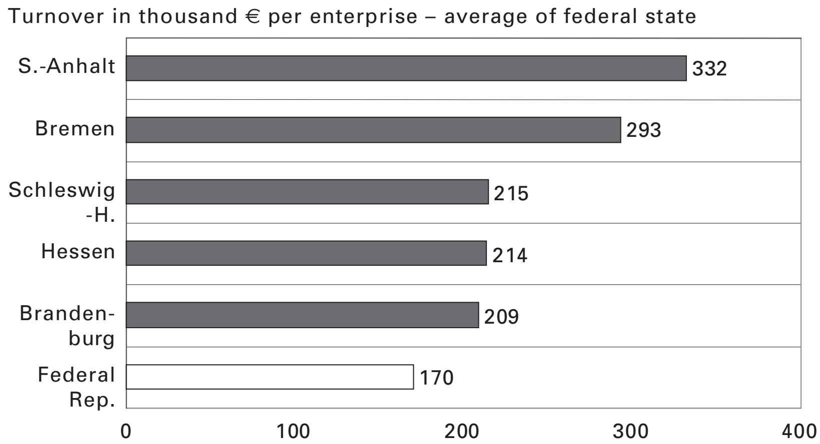


The communication design industries are concerned with the creation of communication or graphic products and services. In 2004, at least 20,000 design offices or enterprises with a total turnover of EUR 9.6 billion were registered. The average turnover per enterprise in this group amounted to EUR 474,000, ranging from EUR 125,000 in Mecklenburg West-Pomerania to EUR 1.1 million in Hessen.

The **industrial design industries** are especially concerned with the design of machines and industrial implements. They are the smallest group of German design industries with 2,800 enterprises and a turnover of EUR 484 million in 2004. The average annual turnover per enterprise amounted to EUR 170,000, with a clearly narrower range than in communication design. Annual turnovers ranged from EUR 107,000 in Lower Saxony to EUR 332,000 in Saxony-Anhalt.

The group of **product design** includes a variety of activities. They range from textile, jewellery, furniture and fashion design to photographic and graphic design with an annual turnover of EUR 1.5 million. It includes about 12,000 design offices with a turnover of EUR 1.5 billion.

Industrial design group, 2004



Source: Destatis, calculated by M. Söndermann/Arbeitskreis Kulturstatistik e.V.

There are additional design-related activities outside of the core sector of the design industry, assigned to other economic branches by the national statistics. First estimates come up with an additional potential of 25,500 design-related offices and enterprises with a turnover of EUR 5.5 billion.

Overall, the German design industries include 60,500 enterprises with a total annual turnover of EUR 17 billion in 2004. This corresponds to 7.4% of all enterprises in the so-called business-related services sector.

Map of design industries in the German federal countries, 2004
Regional centres according to turnover per enterprise.
(Core areas of selected design industries: industrial, product and communication design, 35,000 enterprises with a turnover of EUR 11.6 billion; average turnover per enterprise: EUR 330,000)

Source: Destatis, calculated by M. Söndermann/Arbeitskreis Kulturstatistik e.V. 2006

2.4 Culture Industries Reports of German Federal States and Cities

The first initiative to address the culture industries as a research and policy issue came from the Land of North Rhine-Westphalia in 1992. The Minister for Economic Affairs at that time, Reimut Jochimsen, saw the culture industries as a way out of the structural crisis of the Ruhrgebiet region and commissioned a culture industries report. Other German federal states followed in short sequence, starting mainly since 2002. Each of these reports was compiled for a different reason and focused on different issues.

It is not possible to compare the existing reports of the federal states, especially because the classification systems of economic sectors used in the different federal states are not compatible. The Enquete Committee "Culture in Germany" of the German Parliament and a working group of the conference of Ministers of Economic Affairs started working on a national classification system in 2006.

Culture Industries in North Rhine-Westphalia (starting from 1992)

The reports are published by the Ministry of Economic Affairs and Energy of the State of North Rhine-Westphalia, which has set up a special department for culture industries, or, since 2007, creative industries.

Reason for / focus of the report: Structural change from traditional industries towards modern service sector.

Four culture industries reports on the following topics have been published since 1992:

Culture Industries in Selected German Federal States (Bavaria, Baden-Württemberg, Hessen) (Kulturwirtschaft im Ländervergleich (BY, BW, HE)); Culture Industries in the Economic Regions of North Rhine-Westphalia (Kulturwirtschaft in den Wirtschaftsregionen NRWs); Cultural Labour Market (Kultureller Arbeitsmarkt); Culture Industries and their Network of Branches (Kulturwirtschaft im Netz der Branchen). The 5th culture industries report will be published in spring 2007 with focus on culture industries and qualification.

Culture Industries in Mecklenburg West-Pomerania (1997)

Only one culture industries report was published so far, by the Ministry of Economic Affairs of the Land Mecklenburg West-Pomerania.

Reason for / focus of the report: Identification of employment potential of the culture industries in Mecklenburg West-Pomerania and setting up of a special department for health and culture economy.

Culture Industries in Bremen (1999)

The first report on culture, media and leisure time industries was published in 1999 by GPL (joint planning body of Bremen and Lower Saxony). A new report is under preparation and will be published by the Senate for Economic Affairs and Culture in 2007.

Reason for / focus of the report: Bremen is an urban region with a high concentration of scientific institutions and other service sectors.

Culture Industries in Bavaria (2001)

A report was published by the Bavarian Ministry of Science, Research and the Arts in 2001 as a so-called interpellation, following an initiative of the Bavarian Parliament. There seem to be no further reports, e.g. of the Ministry of Economic Affairs.

Culture Industries in Lower Saxony (2002)

The first culture industries report was published in 2002, commissioned by the Ministry of Economic Affairs. Lower Saxony has a special department for tourism and culture industries.

A second culture industries report, jointly published by the Ministry of Economic Affairs and the Ministry of Culture, is expected in autumn 2007.
Reason for / focus of the report: Music in Lower Saxony

Culture Industries in Schleswig-Holstein (2005)

The first report of the government of the Land (responsible: Ministry of Culture) was published in 2005 and focused on the development and the status of culture industries in Schleswig-Holstein. It was commissioned by the Parliament of Schleswig-Holstein.

Reason for / focus of the report: Explore employment potential and development strategies for cultural tourism.

Culture Industries in Hessen (2005)

The first and the second culture industries reports were jointly published by the Ministry of Economic Affairs and the Ministry of Culture in 2003 and 2005.

Reason for / focus of the report: Culture industries in market-oriented and public cultural institutions, corporate and private cultural sponsoring.

Culture Industries in Berlin (2005)

The first culture industries report was published in 2005 by the Senate for Economic Affairs, with support from the Senate for Culture. The Senate for Economic Affairs has a department for creative industries and a department for the media; their responsibilities include culture industries.

Reason for / focus of the report: Culture industries as growth sector within the Berlin economy. Its great potentials for employment and value added make it a future key sector.

Culture Industries in Hamburg (2006)

The first culture industries report was published by the Department for Cultural Affairs Hamburg.

Reason for / focus of the report: Cultural sectors and public cultural institutions as core areas of the culture industries.

Culture Industries in Baden-Württemberg (2007)

A report on IT and media industries in Baden-Württemberg, which are seen as part of the overall creative industries, will be published in 2007. It is commissioned by MFG Medien- und Filmgesellschaft Baden-Württemberg.

Reason for / focus of the report: Economic and employment potential of Baden-Württemberg in comparison with the overall Federal Republic of Germany, Bavaria and North Rhine-Westphalia. Additional analyses of selected economic regions of BW.

Culture Industries in Saxony-Anhalt (2007)

The first report was published by the Ministry of Culture with support from the Ministry of Economic Affairs and focused on the employment potential in Saxony-Anhalt. A second report is currently under preparation, commissioned by the Landesmarketing Gesellschaft Sachsen-Anhalt (lmg).

Reason for / focus of the report: Design industry.

Culture Industries in Brandenburg (2007)

A first culture industries report is under preparation and expected to be published in summer 2007. Jointly commissioned by the Ministry of Economic Affairs and the Ministry of Culture.

Reason for / focus of the report: Employment potential of the so-called small culture industries; analysis of the metropolis region of Berlin-Brandenburg.

Culture Industries in the City and Region of Aachen (2005)

First culture industries report of a city in Germany. Commissioned by: Kulturwirtschaftliches GründerZentrum e.V. [Culture Industries Founders' Centre]

Reason for / focus of the report: Plans of the City Council of Aachen to facilitate and support the founding of businesses in the culture industries sector.

Culture Industries in the City of Cologne (2007)

The culture industries report Cologne will be published in 2007 (under preparation). Commissioned by: RheinEnergieStiftung Kultur, with support from the Department of Culture of the City of Cologne and Chamber of Commerce and Industry (IHK) Cologne.

Reason for / focus of the report: Economic and employment potential in the city and region of Cologne; develop strategies for the local, regional and international positioning of culture industries.

Contact addresses to order the culture industries reports listed above are included in chapter 4. The majority of reports are available in German only.

3 The European Creative Industries in the EU of 25

The development of value added in the creative industries still shows considerable weaknesses compared to the traditional industries – but in other respects the creative sector is far ahead already today. The employment volume of the creative industries of 6.4 million is high above that of the automobile and chemical industries (2.2 and 1.9 million respectively). Each of these industries achieves only one third of the employment volume of the creative industries.

The *Creative Industries Research Unit* at the University of Art and Design in Zurich[7] in co-operation with the research group "EU Culture Industries" of the Directorate General for Culture of the EU carried out a sector comparison of the creative industries in the 25 member states of the European Union. According to the study, the European creative industries had a labour force of 6.4 million already in 2002. 1.4 million enterprises, including small-scale enterprises and free lance offices, achieved a turnover of EUR 556 billion. The value added, calculated on the basis of EUROSTAT's Structural Business Statistics, amounted to an estimated EUR 215 billion.

On the one hand, these key data for the creative industries indicate that they are now comparable to important European industrial sectors, for today the turnovers of traditional sectors like the chemical industry (EUR 601 billion), the automobile industry (EUR 721 billion), the manufacture of machinery and equipment (EUR 502 billion) or the food industries (EUR 791 billion) lie more or less in the same range as those of the creative industries (EUR 556 billion).

On the other hand, the creative industries are strongly fragmented and consist of three different layers of business forms. Micro businesses and free lance offices provide the "humus" that produces and grants creativity. SMEs form the backbone of the cultural and creative sectors, and the majors and media corporations count in the global market. Due to the exceedingly small-scale structure of the sector, enterprises in the creative industries employ not more than 5 persons on average, while traditi-

7 The Swiss research group with international experts was founded in 2002 and specialises on systematic and interdisciplinary research on culture industries / creative industries. Website: http://www.kulturwirtschaft.ch.

onal industrial sectors like the chemical or the automobile industry have up to 128 persons employed per enterprise.

Whereas traditional industries increasingly lose their ability to create employment, the creative industries could become a relevant driving force for employment in Europe. For this reason, the creative industries should have been included in the agenda of the Lisbon Strategy a long time ago.[8]

Creative Industries in Europe 2002

Comparing the creative industries with selected industrial sectors in the EU of 25

a) Basic data NACE-Code	industry	turnover in billion EUR	value added in billion EUR	labour force in 1000	enter-prises total	
NACE 15	food industry	791	178	4 422	281 824	
NACE 34	automobile industry	721	118	2 163	16 834	a
NACE 24	chemical industry	601	171	1 929	31 421	a
NACE xxx	**Creative industries**	**556**	**215**	**6 420**	**1394 162**	**a**
NACE 40	energy	534	144	1 181	14 880	a
NACE 29	machinery & equip-ment	502	165	3 527	162 257	a
NACE 17+18	textiles & textile products	206	60	2 531	224 184	a
NACE 36	furniture	164	51	1 776	221 367	a

8 For the role of the creative industries within the Lisbon Strategy see also the European Expert Conference “European Creative Industries: Coherent Policies in a Global World”, www.european-creative-industries.eu

b) Key figures NACE-Code	industry	value added per person employed (in 1000)	turnover per per person employed (in 1000)	persons employed per enter-prise		
NACE 15	food industry	40	179	16	-	
NACE 34	automobile industry	55	333	128	-	
NACE 24	chemical industry	88	312	61	-	
NACE xxx	**Creative industries**	**33**	**87**	**05**	**-**	
NACE 40	energy	122	452	79	-	
NACE 29	machinery & equip-ment	47	142	22	-	
NACE 17+18	textiles & textile products	24	82	11	-	
NACE 36	furniture	29	92	08	-	

Notes: (a) Figures on enterprises for 2001. Definition of creative industries includes NACE-Codes: 22.1, 22.3, 72, 74.2+3, 74.4, 74.8, taken over unadjusted from SBS. For the definition of the creative industries in a narrow sense, the NACE-Codes mentioned above were partly adjusted by estimates: publishing (22.1), reproduction (22.3), Software/PC-Games (72.2), architecture / industrial design (74.201-03) without engineering activities, advertising (74.4), design activities (74.87) and the cultural sectors in addition (92.1-5). Codes: value added at factor costs; value added per person employed (visible productivity); persons employed per enterprise (incl. all employed persons, self-employed and employees).

Source: EUROSTAT Structural Business Statistics (SBS) 2002, calculations and estimates by M. Söndermann/Arbeitskreis Kulturstatistik e.V. 2006

4 Contact Addresses

List of all Culture Industries reports in Germany

Overview of the Reports Prepared by German Federal States

1. North Rhine-Westphalia
1st – 4th culture industries report, 1992 to 2002; 5th report expected in spring 2007
Contact: Ministerium für Wirtschaft, Mittelstand und Energie des Landes Nordrhein-Westfalen
Haroldstr. 4
D-40213 Düsseldorf · Germany

2. Mecklenburg-Vorpommern
1st culture industries report, 1997
Contact: Wirtschaftsministerium Mecklenburg-Vorpommern
Johannes-Stelling-Str. 14
D-19053 Schwerin · Germany

3. Bremen
GLP Kultur-, Medien- und Freizeitwirtschaft of 1999. New report under preparation, expected in 2007
Contact: Senator für Wirtschaft und Kultur in Bremen
Herdentorsteinweg 7
D-28195 Bremen · Germany

4. Bavaria
Report on the Bavarian culture industries of 2001
Contact: Bayerisches Staatsministerium für Wissenschaft, Forschung und Kunst
Salvatorstr. 2
D-80333 München · Germany

5. Saxony-Anhalt
1st and 2nd culture industries report 2001 to 2007
Contact: Kultusministerium des Landes Sachsen-Anhalt
Wirtschaftsministerium des Landes Sachsen-Anhalt
D-39114 Magdeburg · Germany

6. Lower Saxony
Culture industries report of 2002. The second culture industries report is expected in autumn 2007.
Contact: Nds. Ministerium für Wirtschaft, Arbeit und Verkehr
Friedrichswall 1
D-30159 Hannover · Germany

7. Schleswig-Holstein
Development and status of the culture industries in Schleswig-Holstein
Report of the government of the Land of Schleswig-Holstein, Drucksache 15/3482
Contact: Landesregierung Schleswig-Holstein
Düsternbrooker Weg 70
D-24105 Kiel · Germany

8. Hessen
1st and 2nd culture industries report of 2003 and 2005
Contact: Hessisches Ministerium für Wirtschaft, Verkehr und Landesentwicklung
Postfach 3129
D-65021 Wiesbaden · Germany

9. Berlin
1st culture industries report Berlin of 2005
Contact: Senat für Wirtschaft, Arbeit und Frauen
Martin-Luther-Straße 105
D-10825 Berlin · Germany

10. Hamburg
Culture industries report Hamburg 2006
Contact: Freie und Hansestadt Hamburg, Kulturbehörde
Hohe Bleichen 22
D-20354 Hamburg · Germany

11. Baden-Württemberg
IT and media industries, creative industries 2007
Contact: Wirtschaftsministerium Baden-Württemberg, Referat Dienstleistungen
Theodor-Heuss-Straße 4
D-70174 Stuttgart · Germany

12. Brandenburg
Culture industries report 2007 (under preparation, summer 2007)
Contact: Wirtschaftsministerium und Kulturministerium, Referat 32
Heinrich-Mann-Allee 107
D-14473 Potsdam · Germany

Overview of the Reports Prepared by Cities

1. Aachen
First culture industries report 2005
Contact: GründerZentrum Kulturwirtschaft
Sandkaulstraße 1
D-52062 Aachen · Germany

2. Cologne
Culture industries report 2007 (under preparation)
Contact: RheinEnergieStiftung Kultur
Maarweg 161
D-50825 Köln · Germany