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DEVELOPMENT PROSPECTS OF UKRAINIAN CREATIVE INDUSTRY ENTERPRISES UNDER THE CHALLENGES OF WARTIME

B a c k g r o u n d . *In the face of military aggression against Ukraine, the issue of stimulating economic growth and restoring national competitiveness becomes increasingly relevant. This article examines the role of creative industries as potential drivers of these processes and their significance under the globalization of economic processes. The study is aimed at identifying and analyzing the prospects for the development of the creative economy in Ukraine in times of military challenges. The authors investigate the theoretical basis of the formation and operation of creative industries in the context of military aggression and define their place in the new economy alongside the innovation and knowledge economies.*

M e t h o d s . *The paper uses an analysis and comparison of international practices of state support for creative industries, as well as an analysis of the impact of the state of war on various creative and cultural industries in Ukraine.*

R e s u l t s . *The article explores the possibility of the development of enterprises in the creative industry sector in times of military conflict. The authors analyze crucial aspects such as changes in consumer demand, funding, infrastructure, and marketing in this important economic sector.*

C o n c l u s i o n s . *The study emphasizes the importance of creative industries as a tool for innovation, modernization, and high-value-added production during the recovery of the Ukrainian economy. The conclusions also highlight the necessity of supporting and developing creative sectors as a factor of demand in global markets.*

K e y w o r d s : creative economy, creative industry, innovation, creativity, Global Innovation Index, gross value added.

Background

Today, the global economy is undergoing major changes. The era of industrialisation is giving way to the knowledge economy and the digital transformation of society. The economic systems of many developed countries have been transformed by the emergence of new technologies, informatisation, neo-industrialisation and the personalisation of the consumer. The economy is now based on creativity, ingenuity and a non-trivial approach, rather than on services alone. In the context of a full-scale war on the European continent, unconventional economic management approaches are becoming more crucial. Thus, the crisis of 2022 makes the creative economy an attractive area for investment at the private, regional and global levels.

The competitiveness of businesses, the traditional perspective of economic growth models, the transformation of values, and the creation of new added value are all being affected by the creative economy. The creative economy also grants independence and promotes invention, in contrast to the industrial economy, which allocates a spot for a creative person in the production chain and confines them to the creative profession itself. This study aimed to investigate the functioning of creative sector enterprises in Ukraine, develop suggestions for improving their activities and growth prospects, and pinpoint the factors that influence the functioning of creative enterprises and the opportunities open for them. Furthermore, the current research analyses

the development of the creative industry environment, as military aggression has emerged as a fresh obstacle to the survival and growth of innovative businesses.

Literature Review. Foreign and domestic scholars have recently been investigating the growth of the creative economy and creative enterprises. The idea of creativity in the economy is thought to have been pioneered by foreign researchers including J. Howkins, R. Florida, and Ch. Landry. Specifically, John Howkins originally proposed to use the term "creative economy" to refer to the outcomes of human creative activity that can be distinguished by economic value. He introduced it into scientific discourse (Howkins, 2002).

Ch. Landry researched the effects of talent and cultural attitudes on the growth of the local economy (Landry, 2001). The relationship between a region's creative economy and its socioeconomic development was the focus of research by R. Florida (Floryda, 2018).

The issues associated with the growth of the creative business are becoming increasingly significant among domestic scholars. For instance, Y. Hryncuk and N. Koval investigated the dynamics of Ukraine's ranking in the Global Creativity Index, Social Progress Index, Global Innovation Index, etc. They identified elements that have a negative impact on the development of the state's creative potential (Hryncuk, 2020).

To identify promising regions and regions of outsiders in terms of the level of development of creative industries, Y. Sotnikova attempted to adapt the methodology of R. Florida to calculate the index of creativity of Ukrainian regions by indices of talent, technology, and tolerance. She then conducted a cluster analysis of regions by these indices (Sotnikova, 2016, p. 181).

The paper "Creativity will save: lessons for Ukraine" by G. Kharlamova and O. Humenna evaluated the role of the creative approach to corporate activity and economic development in general (Kharlamova, & Humenna, 2018). The article focuses on the fundamentals of the creative industries, as well as their dynamics in the US and EU countries.

A. Shegda, T. Onysenko, O. Mykytiuk, and T. Kravchenko investigated the functioning of creative industry enterprises (Shegda, & Onysenko, 2019; Onysenko, Mykytiuk, & Mysnyk, 2021; Mykytiuk, Kravchenko, & Onysenko, 2020). To ensure sustainable competitive advantages of economic entities in the context of the formation and development of the creative economy, the scientists focused on methods of personnel management at creative enterprises, cash flow management, and building a management system at innovative enterprises.

Creative thinking and the creative economy are increasingly penetrating the scientific community. For instance, S. Kyryziuk explored the key patterns and unique characteristics of the worldwide growth of the creative industries. Additionally, he highlighted national factors of the creative industry expansion and evaluated the level of the creative sector development in the Ukrainian economy (Kyryziuk, 2014). The author concluded that as the growth of the creative industries is happening too quickly, Ukraine needs to be flexible in its decision-making on innovation, highly adaptable, and fast to recognise innovations. By taking such measures, it will be possible to prevent distortions in the structure of the creative economy and to create new prospects for the sector.

Today, Ukraine's post-war recovery will be driven by the creative economy, or businesses that represent themselves as creative. At the same time, it is important to keep in mind that John Howkins and Richard Florida were the leaders of this economic movement (Howkins, 2002; Landry, 2001). Howkins is an expert on the creative economy and the author of "The Creative Economy: How People Make Money from Ideas and Creative Ecologies". He is also a member of the UN Advisory Committee on the Creative Economy.

Despite the considerable focus on the development of the creative economy and creative industries, whether it is possible to develop creative industry enterprises in the current economic circumstances of the Ukrainian economy during the time of military aggression and successful post-war reconstruction, however, remains unresolved. These are essential aspects of the way Ukrainian businesses are now operating that both influence and regulate the growth of the creative economy. That is why the relevance of this study is reinforced by the urgent need to determine the future direction of development of Ukrainian enterprises as the basis for the country's post-war recovery.

Methods

Analysis, synthesis, and systematisation are the specific and general research approaches used in the present study. The fundamental characteristics of the creative economy are determined on the basis of a critical study and synthesis of scientific approaches to defining the essence of this concept. The authors pinpointed problematic issues that hinder the development of Ukraine's creative potential, such

as flaws in the legal system and constraints on the external environment of businesses operating in this sector, through the analysis and systematisation of factors influencing the growth of the creative industry under current conditions. After analysing the statistical data, the paper makes recommendations on how to accelerate the growth of businesses in the creative industries in order to assure both their competitive advantages and competitive advantages of the creative economy as a whole.

Results

The World Economic Forum 2020 has identified creativity as one of the most important human skills for the future. This human skill is based on coming up with original solutions to challenges. These are fresh, unusual approaches built on essentially new information, expertise, and capabilities. The creative person takes a central role in the creative economy, alters how economics is thought about, puts cutting-edge and disruptive concepts into practice, and employs his or her skills to address issues and crisis situations in the business environment. The manufacturing process is thus given new life through the creative economy, innovations are introduced, new industries at the crossroads of sciences are born, new services are generated, and trade, marketing, and the standard of living for the typical consumer are all raised to a whole new level.

The first global report on the state of development of the creative economy, which was released in 2008, was promoted as an efficient model for accelerating socioeconomic progress globally. The significance of the creative industries for the economy has been recognised in industrialised nations, where it has been declared one of the top goals for growth. The global financial crisis, which presented unprecedented challenges for the international community in terms of developing the global economy, provided the context for the growth of the creative economy. It was necessary to develop novel, efficient solutions. In contrast to the traditional exploitation of finite natural resources, the creative economy provides the use of practically limitless resources, namely human knowledge and creative talent.

The creative economy is expanding quickly in developed countries despite cyclical ups and downs and is now playing a significant role in many countries' national economies. In fact, the creative industry has proven resilient in recent decades, making it attractive for investment both domestically and abroad. The UN General Assembly proclaimed 2021 the International Year of the Creative Economy for Sustainable Development in 2019. This demonstrates once again the significance and expanding role of the creative industries in economic growth.

The concept of the "creative economy" is often compared to the concept of the "new economy". The two findings are not the same because the former is a part of the latter. The term "New Economy" (also known as the "New Economy" or "Neo-Economy") first originated in the 1990s. Its meaning is connected to a modern ecosystem where intangible assets predominate over tangible ones. In other words, it is an economy of knowledge, new information technologies, and new business processes that ensures leadership and competitiveness. The "new economy" is characterised by its focus on services and knowledge, particularly on its transfer via new technology. In contrast to the traditional economy, which is centred on natural resources, industry, and manufacturing, it depends on human capital, ideas, information, and brands.

The new economy is a complex and multi-level structure today. It consists of the following components: the

experience economy, the transformation economy, the connection economy and the creative economy. The experience economy is a type of new economy, where the main object of creation, purchase and sale are emotions. The experience economy naturally leads into the transformation economy that refers to a system of economic relations that places the consumer at the centre of an experience rather than merely acting as a bystander. The connection economy is a type of new economy that places in the centre value created by building relationships and business connections, rather than tangible assets. The creative economy is a unique sector of the economy based on the use of human imagination in economic decision-making and elevating the value of ideas (Floryda, 2018).

In fact, any type of new economy can be combined with the creative economy. This in turn demonstrates how the creative economy has long since transcended the realm of the creative industries and is quickly encroaching upon every aspect of the economy. And since new technology, innovations, and intelligence are creative economy primary tools, its influence is expanding every year. John Hawkins, in his book *The Creative Economy: How People Make Money from Ideas*, was the first to offer and introduce the concept of the creative economy into widespread use. He explains this concept as "the transaction of creative outcomes with economic value" (Hawkins, 2002).

The UK Department for Culture, Information and Sport defines the creative economy as a group of industries that are associated with individual creative skills and talents and that

have the potential to generate income and create jobs through the exploitation of human intellectual property (Creative Industries Mapping Documents, 1998). In other words, the creative economy includes those sectors that "produce" intellectual property. It was decided to stick to the creative economy as a concept "based on creative assets that can continuously contribute to economic growth and development" in 2008 at the United Nations Conference on Trade and Development (Trade and Development Report, 2008). The definition of the term "creative industries" as given in the Ukrainian Law "On Culture" is as follows: "Creative industries are types of economic activity aimed at creating added value and jobs through cultural (artistic) and/or creative expression" (Law of Ukraine "On Culture", 2010, Dec 14).

A decade ago, the creative economy sector was defined as industries that were mainly related to culture: architecture, crafts, fashion, design, film, music, the art and antiques market, performing arts, publishing, advertising, television and radio, entertainment and recreation. Today, this list should be expanded and supplemented due to the rapid growth of the creative sector and its integration into all sectors of the economy. The classification of creative economy sectors was first developed and proposed by the UNCTAD (United Nations Conference on Trade and Development), which identified four groups and nine subgroups of creative industries (Fig. 1). The classification is made on the basis of the scientific research (Creative Economy Report, 2008).

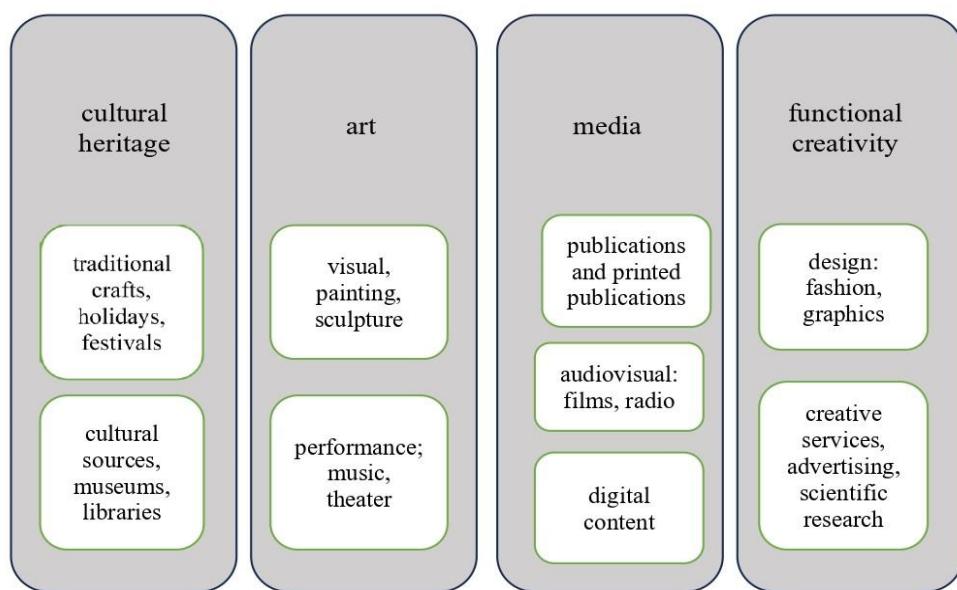


Fig. 1. Creative Industries Classification

Due to the hazy nature and integration of the creative approach into most sectors of the economy, it is important to note that there are no precise and intelligible criteria for assigning to a certain group when examining the classification of the creative business in Ukraine. The idea of categorising the creative industries according to their various types of activities emerged only in 2019. These activities include the following:

- visual arts: painting, graphics, sculpture, photography, etc;
- performing arts: live music, theatre, dance, opera, circus, puppet theatre, etc;
- literature, publishing and print media;

- audio art;
- audiovisual arts: cinema, television, video, animation, animation, etc;
- design;
- fashion;
- new media and information and communication technologies: software, video games, digital technologies in art (3D printing; virtual, augmented, mixed reality, etc);
- architecture and urbanism;
- advertising, marketing, public relations and other creative services;
- libraries, archives and museums;

- folk arts and crafts (On approval of types of economic activity..., 2019).

However, because this strategy primarily focuses on the production of the creative final product, it ignores allied fields that are similarly founded on creative professions and are at the intersection of the sciences.

A global creativity index based on the computation of three primary coefficients – technology, talent, and tolerance – is suggested by economist R. Florida in his book "The Creative Class: People Who Change the Future" as a

comparative indication of the level of innovation among various countries (Floryda, 2018). These assessments place Ukraine 45th out of 139 nations in 2015 (technology 43rd, talent 24th, tolerance 105th) (Skavronska, 2017). Ukraine fell in this indicator from 2021 (49th) to 2022 (57th), as indicated by its position on the Global Innovation Index. The following table is compiled on the basis of the researches (Cornell University, INSEAD, & WIPO, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022) (Tab. 1).

Table 1

Dynamics of the Global Innovation Index of Ukraine, 2015–2022

Indexes	2015	2016	2017	2018	2019	2020	2021	2022
Global Innovation Index	64	56	50	43	47	45	49	57
<i>Innovation Input Sub-Index</i>	84	76	77	75	82	71	76	75
– institutes	98	101	101	107	96	93	91	97
– human capital and research	36	40	41	43	51	39	44	49
– infrastructure	112	99	90	89	90	94	94	82
– market development level	89	75	81	89	90	99	88	102
– business development level	78	73	51	46	47	54	53	48
<i>Innovation Output Sub-Index</i>	47	40	40	35	36	37	37	48
– knowledge and technology	34	33	32	27	28	25	33	36
– creative results	75	58	49	45	42	44	48	63
– intangible assets	82	42	26	13	17	23	29	62
– creative goods and services	87	87	92	86	91	95	93	87
Online Creativity	51	51	47	43	43	39	45	42

Source: compiled by the authors.

The analysis of the indicators listed above made it possible to pinpoint, on the basis of unbiased, factual data, the elements that adversely affect the development of Ukraine's creative potential, including: an unfavourable political, regulatory, and business environment; a lack of state and local government strategic vision for the development of the cultural and creative sphere; insufficient investment in R&D and education; poor quality of education, environment, and personal safety; low level of openness and tolerance of Ukrainian society (Mykytiuk, Kravchenko, & Onysenko, 2020, p. 10). These factors are being made harder by new challenges, such as pandemic threats and military actions in different regions of Ukraine, the negative effects of which have harmed approximately 90 % of business entities, particularly those in the creative industry.

It is important to examine the gross value added produced by creative industry firms in order to understand

the growth rate of the creative economy. The creative industries in Ukraine are generating gross value added (GVA) rapidly. In 2018, the GVA of the creative industries reached UAH 97 billion (3.9 % of the total value added) and UAH 117.2 billion (3.95 % of the total value added) in 2019. Nearly 43 % of the creative industries' total GVA in 2019 was generated through computer programming, which explains why these sectors are expected to rise quickly. Comparing the pre-crisis year of 2013 to 2019, the nominal GVA of computer programming increased by 7.7 times, and when adjusted for inflation, it increased by about 3 times (Fig. 2). The top 5 largest economic activities in the creative industries by GVA, in addition to computer programming, also include advertising agencies (12 %), information technology consulting (10 %), television broadcasting (9 %), production of films and videos, television programmes (4 %) and media placement mediation (4 %).

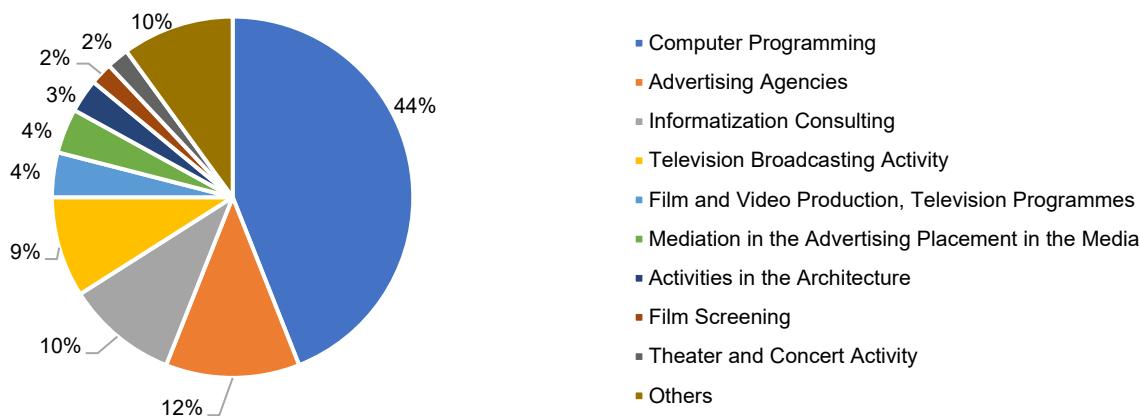


Fig. 2. Structure of Gross Value Added of Creative Industries in Ukraine, 2019

Source: compiled by the authors and based on the study (State Statistics Service of Ukraine, 2019).

A deeper analysis of the creative industries' economic activity reveals that information technology-related activities account for the majority of GVA. In 2019, information technology generated UAH 63.7 billion of GVA, or 54.3 % of the national GVA of the creative industries. Advertising, marketing and PR came in second place with UAH 20.2 billion of GVA, or 17 % of national GVA. Audiovisual art is on the third place with a slight lag – 19.4 billion UAH GVA or 17 % of the national GVA (Nikolaieva et al., 2021, p. 30).

Furthermore, the number of businesses in the creative sectors is expanding quickly. There were 205,500 business entities as of 2019. For instance, in the creative industries there were 175,200 enterprises operating in 2012, and 97,000 in 2013. As a result, the number of businesses generating GVA in the creative industry climbed by more than twice as many in 2019 as compared to 2018 and by 17.3 % as compared to 2013. Other types of economic activity grew more slowly and, as a result, the share of companies increased from 5.6 % in 2013 to 10.6 %.

According to an analysis of the sector's structure by type of economic activity in 2019, almost 59 % of all creative industries enterprises were engaged in computer programming. In 2019, the number of companies in the computer programming industry rose by 21 % since the previous year and more than tripled since 2013. The fact that the simplified reporting and taxing system is being actively used, which encourages specialists to register as individual entrepreneurs, could be a possible reason for this huge development.

The structure of economic entities in the creative industry also includes a sizeable portion of advising on information technology (13 %), advertising agencies (6 %), specialised design activities (3 %) and architectural activities (3%). These areas of activity also exhibit rapid expansion, maybe as a result of techniques resembling computer programming (Nikolaieva et al., 2021, p. 30). Employment in the creative industry has not grown as quickly as economic entities and GVA, although it has climbed by over 40 % since 2013.

Overall, in 2019, creative industry companies employed 352,000 people, or 3.8 % of the workforce. In 2013, only 252,000 people were employed in the creative business, down from a year earlier when 309,500 people did. Additionally, compared to the number of corporate entities, employment in the creative industry is less concentrated in some regions. The number of employees is more fairly divided among other types of economic activity, despite the fact that computer programming still accounts for the majority of employment in the creative business (42 % of all creative industry employees in 2019). When compared to 2018 and 2013, employment in computer programming climbed by 20 % and 2.5 times, respectively, in 2019. This growth rate is comparable to the growth rate of the number of enterprises. IT consultancy (11 %), ad agencies (9 %), architecture (5.4 %), and television broadcasting (4.7 %) all significantly contribute to the workforce in the creative sector.

The audiovisual arts produced the highest GVA per employee in 2019 with a total of UAH 557,000. In terms of GVA per employee, the difference between the creative industry sectors is not as significant as it is in terms of GVA per business entity: this figure is UAH 486 000 for advertising, marketing, and PR, and UAH 333 000 for computer programming. In terms of GVA per employee in 2019, the fashion industry produced the least, at UAH 61,000.

Considering the positive dynamics of previous years, a full-scale invasion should not have had a devastating impact on the work of creative industries. However, given the specifics of these industries, architecture and design, art, advertising, literature and publishing, film and video production and distribution, as well as theatres, museums and, in particular, light industry, have suffered significant losses due to the outflow of creative talent abroad. A study on the state and demands of business in Ukraine during the conflict (Diia. Business., 2023) found that more than 25 % of the country's population (about 10 million people) left their homes, with over 7.5 million of them moving abroad. In other words, professionals from each of the aforementioned creative fields have ceased to work in them. The cornerstone of the state should be culture and the creative industries because it is in these fields that public diplomacy and positioning of the nation abroad take place. Furthermore, the outcome of these interactions has an impact on the state's internal stability as well as its investment attractiveness on external markets (Karavay, 2022). To quickly restore these areas of economic activity in light of the aforementioned issues, representatives of the creative sector of the economy need to come up with novel methods for swaying consumers. This will in turn trigger the beginning of macroeconomic recovery processes via the accumulation effect.

Discussion and conclusions

The development of the economy and society is increasingly reliant on creativity, the cornerstone of the creative economy. This is demonstrated by the 50 million employment created by the creative economy sectors and the 6.1 % increase in the world's GDP, which demonstrates a consistent growth of 30 % annually. The creative industries provide more than 10 % of the GDP in a number of countries. However, Ukraine had a sizable pre-war contribution to the creative economy, accounting for 7 % of GDP, but it had considerably greater potential. The domestic creative sector of the economy needs significant changes and improvements exactly because there are some restrictions that need to be removed.

The present study's findings conclude that the creative economy in the EU countries, as well as Australia and Canada, has at least four solid "legs" to stand on: 1) policies and legislation; 2) clusters and hubs; 3) incubators and accelerators; 4) professional networks and associations. Municipalities actively participate in the development of clusters and incubators, since access to technology and creative talent are the two main competitive advantages for modern cities worldwide. Networks and organisations represent the sector's interests in the political arena and promote the implementation of appropriate strategies and regulations that break down rather than add to development hurdles (Ukrainian week, 2016).

This study has raised several concerns in need of further investigation. First, intensification of research efforts of the scientific community in collaboration with the creative sectors in order to make a profit through the knowledge, talent, and concepts embodied in business models and technologies. Second, creating new jobs, generating income for creative sector participants, expanding exports of goods and services from the creative economy, and, ultimately, raising the competitiveness of the Ukrainian creative industry on a global scale. The study's findings suggest that in order to put into effect the processes of Ukraine's overall

economic growth in the post-war era, the creative sector participants need to implement new cutting-edge European practices of state support intended to develop infrastructure, financial support, and information support for small and medium-sized businesses in the creative industries. As a result, researchers should focus on cooperation with representatives of the real business of the creative economy and optimise existing models of monetisation of creative products in response to new environmental challenges.

Authors' contribution: Oksana Kovalenko – source analysis, preparation of a literature review and theoretical foundations of research; Tetiana Onysenko – methodology, formal analysis, collection of empirical data and their validation, writing and editing text; Oksana Mykytiuk – methodology, formal analysis, collection of empirical data and their validation, writing and editing text; Tetiana Kravchenko – empirical research, source analysis, preparation of literature review; Tetiana Svyrydiuk – writing and editing text.

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ПЕРСПЕКТИВИ РОЗВИТКУ ПІДПРИЄМСТВ КРЕАТИВНОЇ ІНДУСТРІЇ УКРАЇНИ У ВИКЛІКАХ ВОЄННОГО ЧАСУ

Вступ. В умовах воєнної агресії проти України проблема стимулювання економічного зростання та відновлення національної конкурентоспроможності стає все більш актуальну. Визначено роль творчих галузей як потенційних драйверів цих процесів та їхнє значення в контексті глобалізації економічних процесів. Основна мета дослідження – ідентифікація та аналіз перспектив розвитку творчої економіки в Україні в умовах військових викликів. Розглянуто теоретичні основи створення і функціонування творчих галузей в умовах воєнної агресії та визначено роль, яку вони відіграють у новій економіці поряд з інноваційною та знаннєвою економікою. Зазначено на тому, як культурні та творчі індустрії можуть бути стимульовані або обмежені в контексті воєнного конфлікту, а також, як це може впливати на соціально-економічну динаміку економічного зростання/спадання.

Методи. У дослідженні використано метод аналізу та порівняння у процесі вивчення міжнародної практики державної підтримки творчих галузей, а також аналіз впливу воєнного стану на різноманітні галузі творчості та культурної промисловості в Україні.

Результати. Досліджено можливість розвитку підприємств у галузі креативної індустрії в умовах військового конфлікту. Проаналізовано такі важливі аспекти, як: зміни у споживчому попиті, фінансування, інфраструктура та маркетинг у цьому важливому секторі економіки. Показано епіфузію військових конфліктів на ймовірні зміни в галузі креативної економіки.

Висновки. Розглянуто важливість творчих галузей як інструменту інновацій, модернізації та виробництва з високою доданою вартістю в контексті відновлення української економіки. Вказано на необхідності підтримки та розвитку творчих секторів як фактора підвищення попиту товарів української економіки на глобальних ринках.

Ключові слова: креативна економіка, креативна індустрія, інновації, креативність, глобальний індекс інновацій, валова додана вартість.

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