InterMedia

Culture and Cultural Industries

Complex Research Results 2017

Structure of the cultural sector

Definition of cultural industries

Creative industries in the world

Universal flow chart for culture in the 21st century

Financial indicators of the cultural sector in the Russian Federation

InterMedia Communications

Intellectual Property Council of the Chamber of Commerce
and Industry of the Russian Federation

CULTURE AND CULTURAL INDUSTRIES

Complex Research Results 2017

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CULTURE IS THE BASIS OF CIVILIZATION DEVELOPMENT

The role of culture in the society's development has never been doubted, but recently they have been saying more and more often in not only cultural but also economic, legal, state circles that exactly culture is the basis of the society's development, and increased attention to cultural industries is a necessary ground for its accelerated development. The fact is understood better and better: economic and social processes depend on the cultural level of social groups and the society as a whole to a much more considerable extent than we used to think in the past, and only after that, they depend on progressive ideas, state-of-the art innovations and advanced technologies.

The importance and significance of culture are specially mentioned in the key international documents, in particular the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005) [1], the United Nations' Sustainable Development Goals (2015) [2], and many others.

THE CULTURAL INDUSTRIES PHENOMENON

The origination and boisterous development of the absolutely new for developed countries (and later emerging states as well) phenomenon – cultural (creative) industries - became one of the most notable civilization phenomena in the 19th-20th centuries. The rapid rise of the cultural level and well-being of the people in developed countries became the prerequisite for that, and that led to multifold growth of sustainable demand for works of art of all kinds on the part of not only the elite but large sections of the public as well. This demand was satisfied by technical sectors with the help of both new ways of works' distribution and new – mass – kinds of arts and ways of spending one's free time.

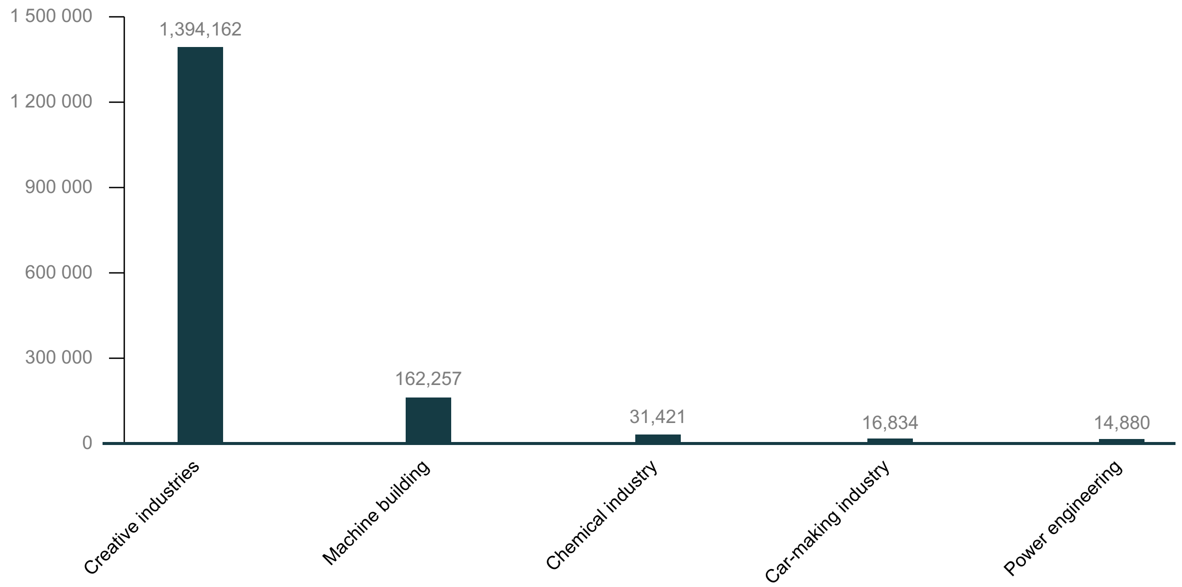
The mass culture revolution cardinally changed the world over 150 years and goes on changing it every day – if the access to artists' works, performances by professional actors and musicians was available only for several millions of elite representatives in the middle of the 19th century, in the 21st century, 90% of the population of the globe, which increased five times over this period, have gotten this opportunity. The same took place in other kinds of arts and leisure: literature, printed media, TV, radio, games, and tourism. The number of people employed in the sector increased dozens and hundreds of thousands times.

The industries providing these processes picked up steam and started playing a considerable role in the life of the humankind, becoming tools for both societies' building and destruction. Fierce struggle for the influence on culture goes on both at domestic and international levels, and the biggest international corporations controlling mass sectors of culture, actively engaged in this struggle. They successfully snatch the initiative from clumsy and slow and often corrupted state bodies.

Many states, including those not economically developed, are currently trying to use cultural industries for creation of recognizable and prestigious images of the country and cities aiming to get advantages in competitive struggle and inter-state competition. The generally recognized value of such cultural icons as the Eiffel Tower in France, Taj Mahal in India or Sydney Opera House in Australia is already giving way to whole cultural areas combining creativity and business – and this is not only the Silicon Valley in the United States but, e.g., the cultural center on Saadiyat island in Abu Dhabi attracting millions of dollars in investments every year.

The rates of creative economy's development are confirmed by statistical data. The presented below diagram illustrates the perceptible gap in the number of enterprises in the creative sector and traditional sectors of economy in the European Union.

Fig. 1. EU industries by the number of enterprises, 2002



Source: EU Directorate General for Education and Culture

It's important to mention that nearly all enterprises in the creative industry are referred to small-sized and one-man business enterprises, and that emphasizes the creative focus of the industry, its aiming at individual development, accelerated accumulation of human capital.

As John Newbigin, former special advisor to the Minister of Culture of the United Kingdom, mentions in one of his recent articles, the access to information, intellectual property objects and creative protection are already now becoming determining success factors on the international scene in the 21st century like the power engineering policy and access to energy determined geopolitics during the whole 20th century.

There is no one single commonly accepted and agreed upon definition of the concept of culture among the great number of existing definitions either. In the broad sense, *culture is an aggregate of the results of socially useful human activities*

THE PARADOX OF DEFINITIONS IN THE CULTURAL SECTOR

Researchers, politicians and legislators unanimously glorify the importance of culture for the society and state, but inevitably run across one of the main paradoxes of the cultural sector and cultural industries – lack of common and generally accepted approaches to determining structures and borders of the cultural sector as well as standardized methods of analysis. There were a lot of efforts applied in this direction but still there is no common understanding and terms in the cultural sector even in developed countries. And that is often reflected in archaic national relevant laws and international conventions. "It's not known how long the Berne Convention can still stand," Mikhail Fedotov, advisor to the President of the Russian Federation, said in 2018 about one of the founding international documents in the cultural sector, adopted in 1886, and it's difficult to add anything to it.

There is no one single commonly accepted and agreed upon definition of the concept of culture among the great number of existing definitions either. In the broad sense, **culture is an aggregate of the results of socially useful human activities**. However, a narrower and more definite definition is always used for practical purposes, first of all, for state regulation.

The term of *Cultural industry* (in singular form) to describe theatre, dance, music, cinema, fine arts, etc. that had grown in scales, was offered already in 1944 by scientists from the Frankfurt school (Theodor Adorno, Max Horkheimer) – and negative meaning was attached to this definition at the time [3].

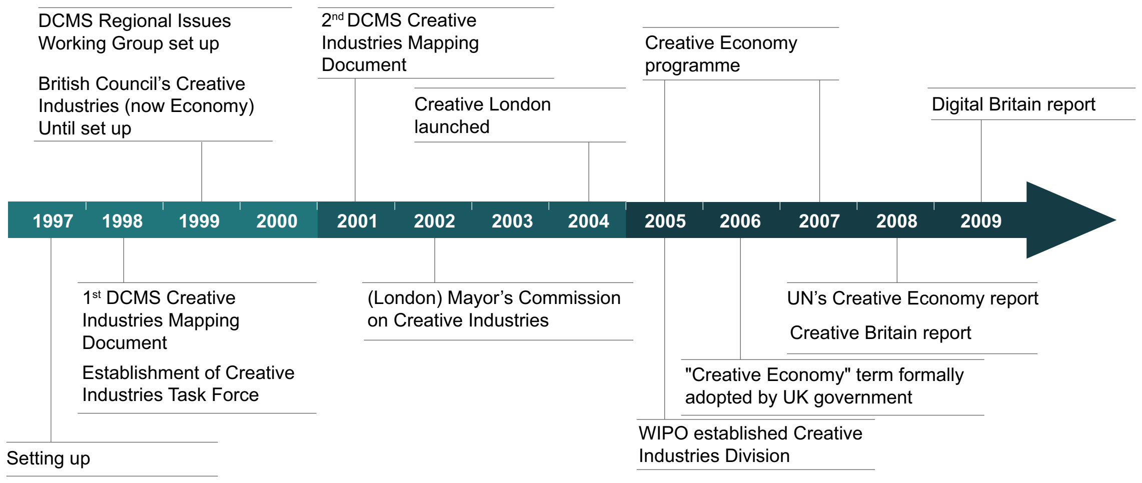
In the 1970s, a number of researches (in particular, John Myerscough) started studying the phenomenon with a more positive connotation, the plural variant ("industries") originated at that time as well. Later, they started using the definition "Creative Industries" as a synonym – though not all cultural activities are related to creativity. At the same time, analysts paid attention to the fact that the term "industries" itself is perceived in a contradictory way as it raises the question as to what extent culture can be considered an industrial sector (industrial production patterns as well as sales of goods and services are not always applicable to it).

The UNESCO defines [4] cultural and creative industries as "sectors of organized activity, whose principal purpose is production or reproduction, promotion, distribution and/or commercialization of goods, services or activities of a cultural, artistic or heritage-related nature". This approach not only singles out industrially copied products of human creativity but also makes urgent the whole production chain as well as certain functions of each sector related to bringing these creations to the public.

Criteria for referring to creative industries were defined in this document – "those activities that have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property." There were also 13 sectors listed: advertising and marketing, architecture, fine arts and antiques, crafts, design, fashion design, films, interactive software for leisure, music, publishing, software, TV and radio. It can be easily noticed that some of these sectors can hardly be referred to creative, nevertheless, after this document was published, British sources have been using the term "Creative Economy/Industries" more and more often instead of the term "Cultural Economy/Industries."

One of the first serious attempts to measure the cultural contribution to the life of the society at the national level was made in 1994 in Australia where a large-scale research of the cultural sector was carried out at the state level, "Creative Nation: Commonwealth Cultural Policy" [5]. In 1997, the newly elected Labour government with Tony Blair at the head set up the Department for Culture, Media and Sport of the United Kingdom (DCMS; Department for Digital, Culture, Media and Sport from 2017) that assessed the impact of creative industries on their economy based on the Australian research, in "Creative Industries – Mapping Document" [6], which had a strong impact on state practice – but still mostly in the Anglo-Saxon countries.

Fig. 2. Key Events in Developing Approaches to Cultural Economy in the United Kingdom



Source: BOP Consulting

The unanimity is currently lacking not only from the point of view of the variety of activities drawn into this industry, but also from the point of view of different approaches and definitions. Thus, if the above-mentioned Creative Industries and the expanding it idea of Creative Economy are typical for the British eye, the French and German terminology uses the Frankfurt school's definition of Cultural Industries. The Scandinavian approach is characterized by the term Experience Economy, emphasizing the attention to the entertainment industry and the economic component.

Currently, the official definitions of cultural industries in all countries are lists of activities, they are fairly various and related to national traditions. E.g., architecture in the Anglo-Saxon and Scandinavian countries is considered to be a cultural industry and not considered in France and India. Sport is considered a cultural industry in Denmark and Spain and not considered in most other countries. Governmental, religious and non-governmental organizations are included in cultural industries in Spain and New Zealand; jeweler's arts are included only in China and Hong Kong; museums in most countries but not in France, China and Norway, etc. (you can see that in Annex 1. in detail: "Definitions of Cultural Industry and its Structure in Various Countries of the World" on page 26). Besides all the rest, this also affirms **practical impossibility to correctly compare the scales and rates of national cultural industries' development.**

The analytical and scientific community has not determined the methodology either. Some leading world companies use evidently incorrect terms in the analysis of cultural economy – Entertainment industries or Entertainment & Media). Unfortunately, analysts stubbornly fail to reveal the very deep sense of attaching Tchaikovsky's and Rakhmaninov's music, Tolstoy's and Dostoevsky's novels or, for example, the Bible to "entertainments." One leading international analyst in his research for the United States International Trade Administration [7] refers only some segments of culture to Media & Entertainment – book publishing, music (only records), cinema, TV and video (as one unit), radio, video games – and according to the same calculation model he determines that the American industry with the US$ 735 billion turnover controls 1/3 of the global industry. At the same time, concerts, theatre, fine arts, design, printed media, etc. are for some reason not taken into account. However, all these sectors are mentioned in the Russian market research under the same title, prepared by the same analyst, though without details and not revealing the methods [13].

Photo: shutterstock.com / Kirill Neiezhmakov

Fig. 3. Structure and Characteristics of Cultural and Creative Sectors in the EU

Circles	Sectors	Sub-sectors	Characteristics
Core arts field	**Visual arts**	Crafts Paintings Sculpture Photography	● Non industrial activities ● Output are prototypes and "potentially copyrighted works" (i.e. these works have a high density of creation that would be eligible to copyright but they are however not systematically copyrighted, as it is the case for most craft works, some performing arts productions and visual arts, etc)
	Performing arts	Theatre Dance Circus Festivals	
	Heritage	Museums Libraries Archaeological sites Archives	
Circle 1: Cultural industries	**Film and video**		● Industrial activities aimed at massive reproduction ● Outputs are based on copyright
	Television and radio		
	Video games		
	Music	Recorded music market Live music performances revenues of collecting societies in the music sector	
	Books and press	Book publishing Magazine and press publishing	
Circle 2: Creative industries and activities	**Design**	Fashion design, interior design, product design, graphic design	● Activities are not necessarily industrial, and may be prototypes ● Although outputs are based on copyright, they may include other intellectual property inputs (trademark for instance) ● The use of creativity (creative skills and creative people originating in the arts field and in the field of cultural industries) is essential to the performances of these non cultural sectors
	Architecture		
	Advertising		
Circle 3: Related industries	**PC manufacturers** **Mp3 player manufacturers** **Mobile industry, etc…**		● This category is loose and impossible to circumscribe on the basis of clear criteria. It involves many other economic sectors that are dependent on the previous "circles", such as the ICT sector.

Cultural sector *Creative sector*

Source: EU Directorate General for Education and Culture

Fig. 4. Differences in Approaches to Assessment of Cultural Economy in Different Countries

"Creative industries" approach	"Copyright industries" approach	"Experience economy" approach	Sector specific studies
Austria	Denmark (2006)	Sweden (2004)	French community of Belgium
Flemish community of Belgium	Finland	Denmark (2003)	France
Denmark (2000)	Hungary		Ireland
Estonia	Latvia (2005)		Poland
Latvia	Norway		Portugal
Lithuania			Slovakia
Sweden (2002)			Spain
Romania			
Bulgaria			

Source: EU Directorate General for Education and Culture

THE IT INDUSTRY AS THE LEADING SEGMENT IN THE CULTURAL SECTOR

The availability of access to information technologies (hereinafter – IT) by the wide audience in the 1990s became a significant event for cultural industries. Consumption of creative content and entertainments increased many times just over one decade – this fully transformed the cultural landscape all over the globe.

The IT industry quickly reacted to the demand – starting from the 21st century, large sections of the public have been getting access to creative content mostly via its infrastructure (household electronic appliances, Internet providers, data centers, etc.):

1. Practically all modern household electronic appliances (from audio, video and TV-sets to computers, smartphones, tablet PCs, phones and other gadgets) are specially designed for the maximally convenient access to video, music, pictures, texts and other creative content.

2. Creative content consumption makes up to 50–60% of the total operation time of users equipment, up to 70–80% of global Internet traffic and up to 80% of technical infrastructure's payload.

3. Traffic and revenues of social networks, search engines and other big web resources are mostly generated by creative content.

4. A significant (the biggest according to some estimations) part of the IT industry's profits on the whole is formed exactly by using creative content.

5. A possibility of free access to content is one of the main drivers of the IT industry's growth.

6. The game framework, formed by the IT industry, is one of the main kinds of free time spending by various strata of the population, first of all, young people.

The IT industry, currently, is a creative content delivery system

Thus, communications, education, science and other functions, previously declared as the main ones for the IT industry, are not priorities of the IT industry. Currently, it is a creative content delivery system, supplying it to the public, thus being the main segment of cultural industries.

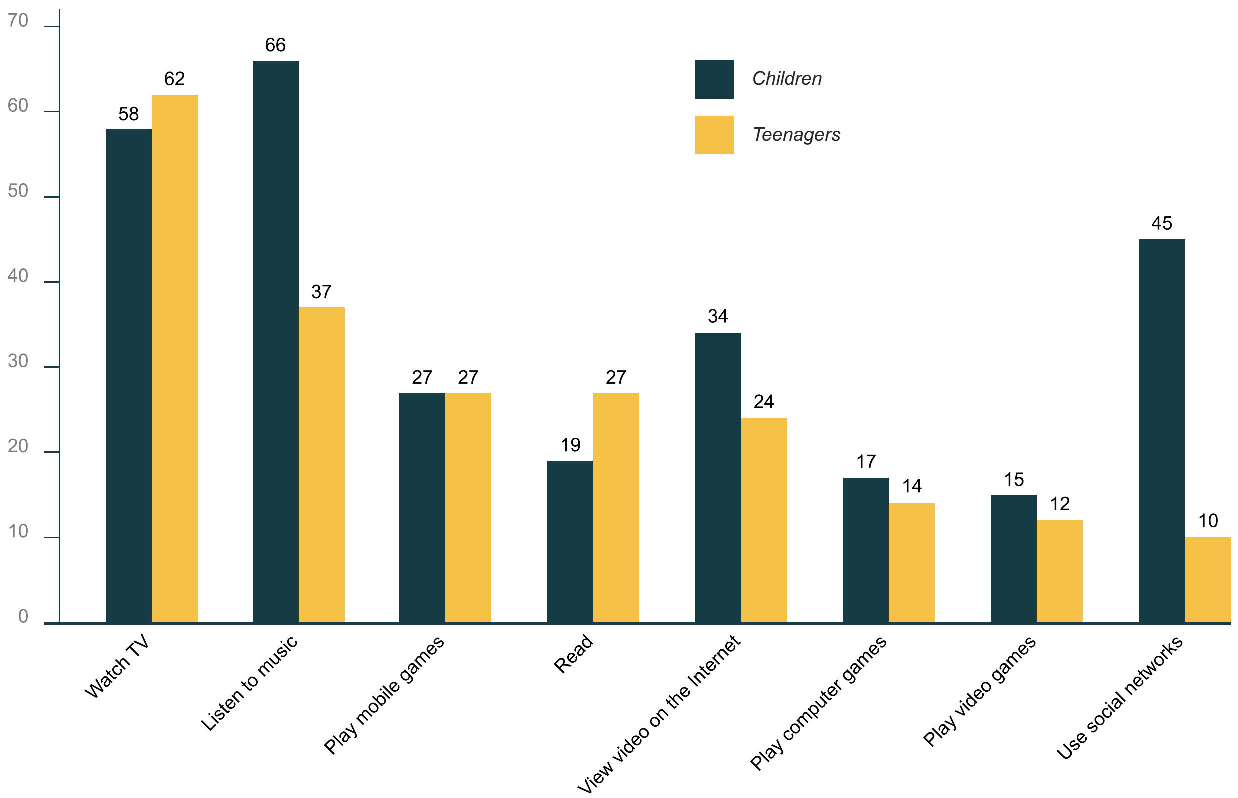
Bill Gates wrote exactly about that in his article *Content is King* (published on his personal website on January 3, 1996, deleted later):

"In a sense, the Internet is the multimedia equivalent of a photocopier. It allows material to be duplicated at a low cost, no matter the size of the audience. The Internet also allows the information to be distributed worldwide at basically zero marginal cost to the publisher … But the broad opportunities for most companies involve supplying information or entertainment … Those who succeed will propel the Internet forward as a marketplace of ideas, experiences and products – a marketplace of content.

Content is where I expect much of the real money will be made on the Internet, just as it was in broadcasting (radio and TV – note by InterMedia)..."

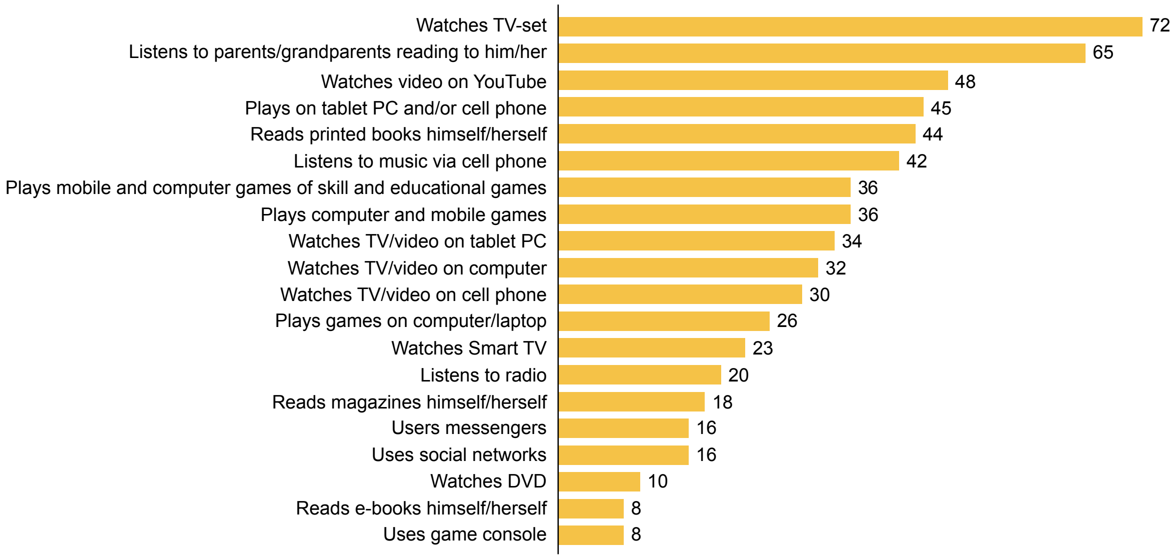
Below are the results of research visually showing the place of the IT industry in the cultural sector.

Fig. 5. Everyday Use of Household Electronic Appliances by Children (9–12 years) and Teenagers (13–19 Years) in the United States, 2015, %



Source: Common Sense

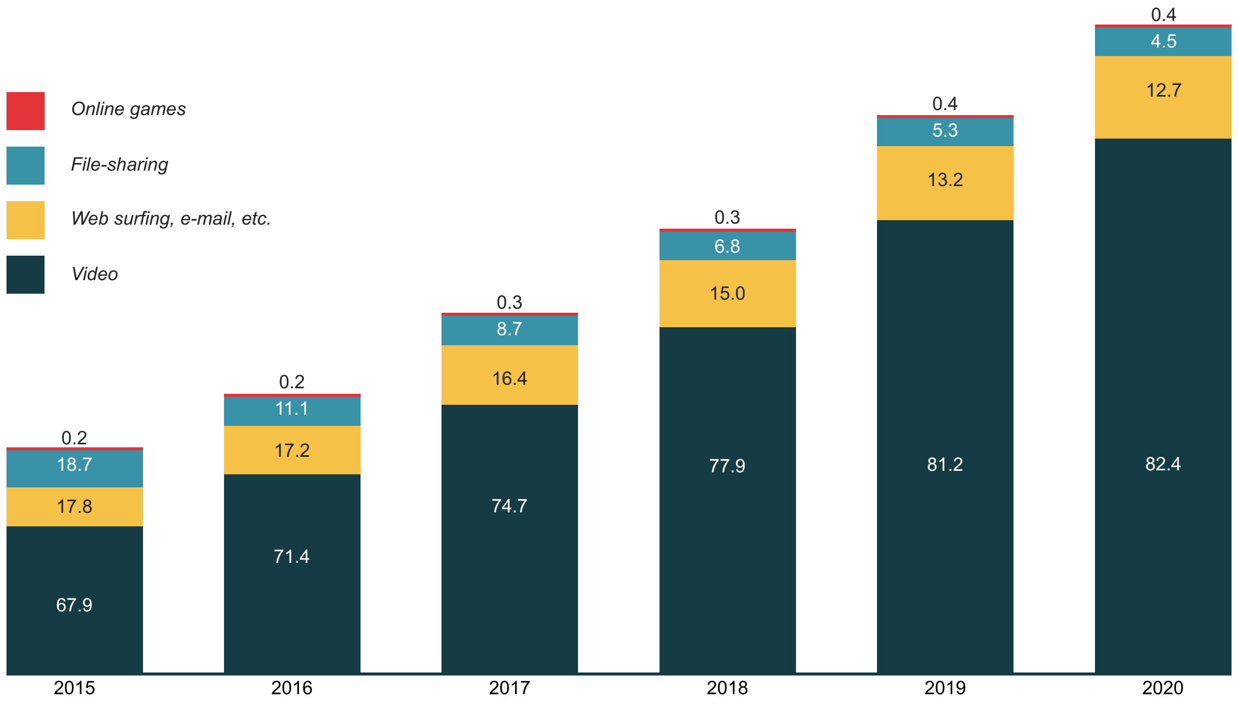
Fig. 6. Media Leisure of Children Aged Younger than 12, 2017, %



Note: Parents of children aged from 0 to 12 took part in the survey

Source: MOMRI

Fig. 7. Shares of Global Internet Traffic Consumption per Segments, 2015–2020, %



Source: Cisco

Fig. 8. Monthly Use of Mobile Devices, 2013–2018

Segment	2013	2018
Monthly traffic, GB	0.4	3
Video viewing, hours	2	20
Audio listening, hours	2	10
Number of video calls	5	10
Number of downloaded apps	2	20

Source: Cisco

THE SYSTEMIC CRISIS OF CULTURAL INDUSTRIES IN THE EARLY 21ST CENTURY

Thus, currently the cultural sector – independent of systems and approaches – is not so much an aggregate of theatre and concert companies, halls, movie theatres, exhibitions, libraries, etc., as an aggregate of devices and technologies, petabytes of information, hundreds of millions of files with recordings, broadcasts, leisure services used by billions of people. The directions and rates of cultural economy's development are accordingly determined all over the globe by the information technology industry (IT industry including communications services, production of professional and household electronic appliances, creation of software and web services, consulting, etc.). The leading corporations of this industry are the world leaders in capitalization, economic and political influence.

It's clear that it is impossible to effectively regulate the cultural sector using methods and regulations of the 18th – 19th centuries in the today's environment. "It's not known how long the Berne Convention can still stand," Mikhail Fedotov, advisor to the President of the Russian Federation, said bluntly in 2018 about one of the founding international documents in the cultural sector, adopted in 1886, and it's difficult to add anything to it.

In recent decades, the issue of a new comprehensive international convention, setting just rules for cultural industries in the digital era was raised many times. Many experts see the only possibility to restore direct interrelation between the volumes of global consumption of creative content and remuneration for its creators in adoption of such a convention, thus providing natural growth of cultural industries (without additional costs for the society and state). However, attempts to start discussion of this issue in professional and state circles not always strike a chord with the leaders of developed countries and international associations.

In this connection, InterMedia experts pay attention to evident discrepancy of lobbyist capabilities of the biggest world corporations and creators of creative content. It's also necessary to take into account the pronounced striving of the biggest IT companies to participate in production of creative content – most often via acquisition of producers or merger with them. Here are some of the transactions made recently:

1. Sony Corporation set up Sony Music Entertainment in 1998 based on acquisition of CBS Records company. Film company Sony Pictures originated in 1989 when Sony bought Columbia Pictures and its divisions TriStar Pictures.

2. French media-company Vivendi bought Universal Music Group in 2006.

3. Telecom-company Comcast bought NBC Universal in 2011 together with Universal Pictures, Illumination Entertainment, DreamWorks Animation, TV-company NBC and others.

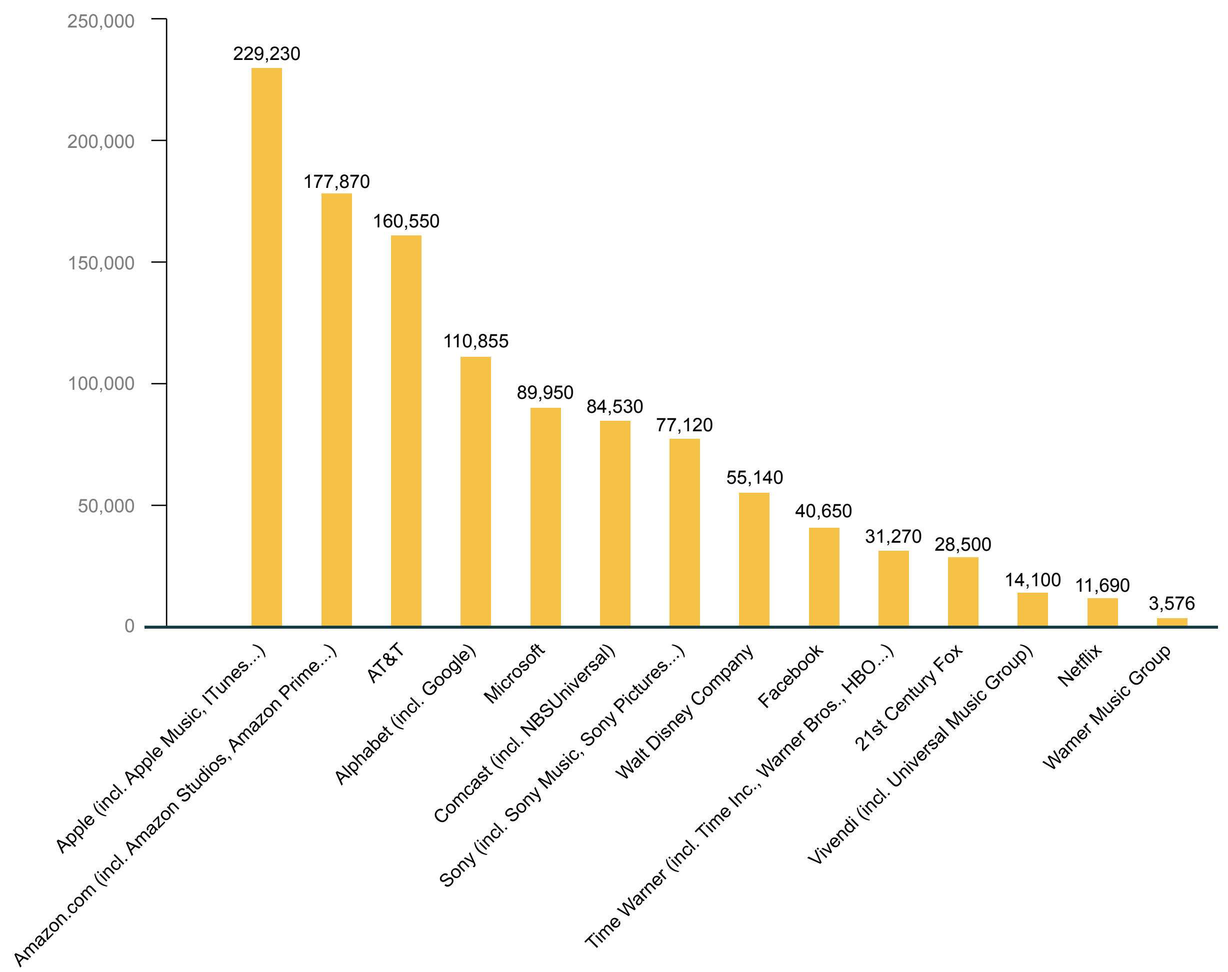
4. Len Blavatnik's investment company Access Industries bought Warner Music Group in 2011.

5. The leader of the United States telecom market AT&T bought Time Warner (changing the name to WarnerMedia) on June 21, 2018 together with the Time magazine, Warner Bros. Entertainment, TV channels CNN, HBO, CW and others.

6. The Walt Disney Company, owning Marvel Entertainment, TV network ABC, entertainment parks and theatre division bought 21st Century Fox corporation in 2018 together with several film companies and TV broadcasting network,

etc.

Fig. 9. Turnovers of the Biggest Companies in the IT and Media Sectors, 2017, US$ mln



Note: transactions made after December 31, 2017 are not included in the histogram

Sources: Company reports

Inclusion of the biggest in the past and now not very important companies from cultural industries into IT corporations can mean only one thing – demise of whole areas of cultural economy as independent segments. Currently, they more and more perform auxiliary tasks together with increase of turnover and profits – attraction and keeping mass clients in IT corporations' ecosystems.

After everything said above, it's not surprising that developed countries easily release the biggest IT corporations of the world from responsibility for free of charge use of cultural content with the help of documents like the Online Copyright Infringement Liability Limitation Act (Safe Harbor Act, adopted in 1998) and others. In essence, governments of developed countries unambiguously and consistently assist the maximum monopolization of cultural industries all over the world.

It's illustrative that there are ambitious statements constantly heard against this background about – this time "absolutely and definitely victorious" – measures taken for fighting the so-called intellectual piracy.

InterMedia Communications has been an active participant of the fight against pirates over the last three decades – cooperating with IFPI, National Foundation for Support of Rights Holders, Russian Anti-Piracy Organization and other international and national sector associations. The data volume accumulated over this period allows InterMedia experts to state with authority that anti-piracy measures undertaken by states and associations are far from effective. From the moment monitoring was launched in 1988 till the present time, the piracy scales in Russia and all over the world did not reduce in any period and increased all the time in full accordance with global growth of creative content's consumption.

It should be specially mentioned that costs of anti-piracy activities greatly exceed not only the real but also supposed economic effect. All legal music and film services in the world are still unprofitable (with the exception of conditionally profitable Netflix, at the moment optimistically planning recoupment in 139 years according to EV/EBITDA indicator). At the same time, some services boisterously announce from time to time in media about long-awaited profits (usually as a result of one quarter) – in order to convince investors in the prospects of business. The result of decades of self-sacrificing pirate-fighting is only giant amounts spent by states and associations.

All the given data and assessments lead to a logical conclusion about the regulation and law enforcement crisis in the cultural sector both at the national and international levels. Currently, approaches to state management and regulations are not on the whole in accordance with the realities of the globalized digital world and do not assist efficient development of the cultural sector.

COMPLEX RESEARCH OF THE CULTURAL SECTOR IN THE RUSSIAN FEDERATION

Until recently, studies of cultural industries in the Russian Federation practically did not go beyond academic halls – notwithstanding considerable numbers of authoritative papers on the topic, state regulation and statistics still continue using terminology and approaches of the 1930–40s in practice.

This state of affairs negatively affects both development of cultural industries and effectiveness of the cultural sector's support by the state. In view of that, in April, 2017 the Working Group for the issues of commercialization of intellectual activities' results from the Intellectual Property Council of the Chamber of Commerce and Industry of the Russian Federation (hereinafter – the Group) jointly with InterMedia Communications launched preparation of suggestions for the concept of the Law on Culture. The urgency of the problem was soon confirmed at the highest level – the President of the Russian Federation Vladimir Putin said about the necessity of working out the new Law on Culture in December, 2017 at the meeting of the Presidential Council for Culture and Arts.

The Group's work started from comparative analysis of approaches to assessment of the economy of culture in developed and emerging countries. The principal special feature of the cultural sector was taken into account – the variability and diversity of processes in which, in contrast to other sectors of economy, it's extremely difficult to divide the planning, production and sale stages. The communication technologies for creators and audience in each of the segments, even close in style and origin, often differ principally, dynamically and unpredictably changing both at the national level and also within the framework of international jurisdictions.

In May, 2017, the Group prepared preliminary research results, from which it became clear that objective studies of the cultural sector are impossible without determining its borders, structure and terminology. With other countries of the world as an example, it was offered to proceed from the established traditions and determine two components of the cultural sector of the Russian Federation – **creative activities and leisure activities**, with state and industrial segments operating in each of them.

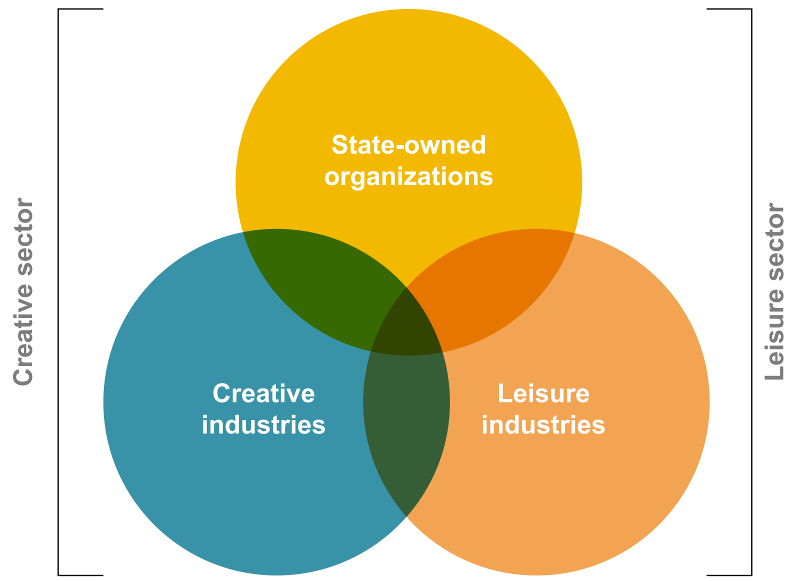
It was suggested for the requirements of the research to single out of the set forth by the law list of the intellectual activity results (IAR) those that in contrast to scientific, technical and economic ones have creative character:

- works of literature and arts
- performances
- sound records
- radio and TV programs broadcasting or cable transmission
- complex or composite objects created based on the above-mentioned IAR.

It was suggested to name the listed kinds of activities "creative results of intellectual activity" (CRIA).

State regulation and statistics still continue using terminology and approaches of the 1930–40s in practice

Fig. 10. General Structure of the Cultural Sector in the Russian Federation



Source: InterMedia

Definitions of culture activities:

Creative activity – creation, distribution, use and preservation of works and other creative results of intellectual activity, including historical and cultural monuments and landmarks.

Leisure activity – conducting out mass events not based on the creative results of intellectual activities of all kinds, work in clubs, tourism and tours, lectures, games, museum and exhibition activities in the fields of history, regional lore and history, nature, science, technology, etc.

Cultural economy = Creative economy + Leisure economy

Not included in the cultural sector:

- public, political and religious activities
- scientific and technical activities, prospecting, inventing, rationalization
- production
- trade
- transport
- education
- consumer services
- sport
- public catering
- out-of-culture leisure (gambling, hunting, fishing, etc.)

Note: Some or the other forms of leisure are referred to "cultural" and "out-of-culture" according to traditions and cultural level of social groups of the population.

other.

Thus, the Group worked out definitions for sectors of the **cultural economy**:

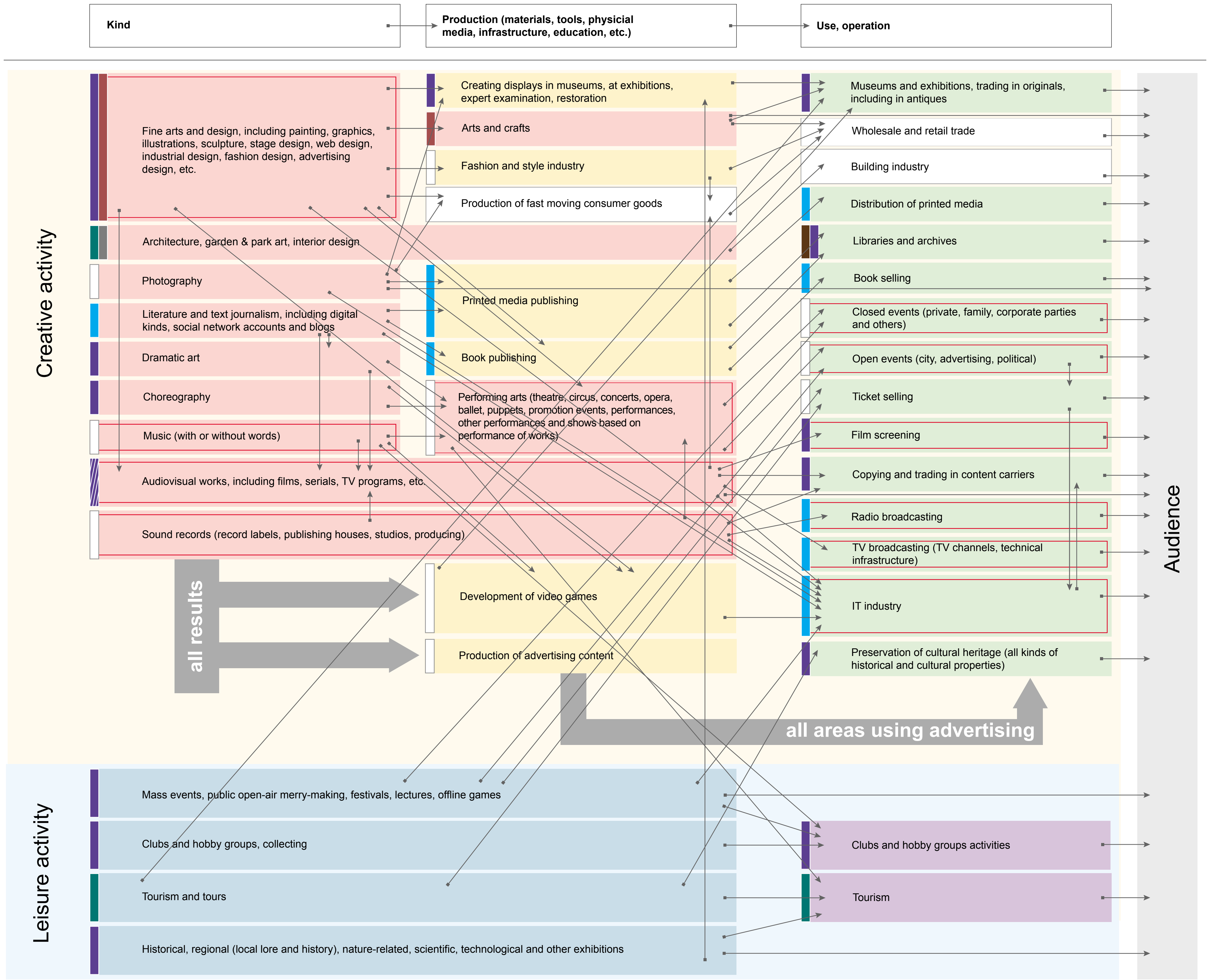
Creative economy – the aggregate industries in which access to results of creative intellectual activities is the determining factor for consumption of goods and services.

Leisure economy – the aggregate industries in which demand for cultural forms of leisure is the determining factor for consumption of goods and services (access to results of creative intellectual activities is not the determining factor).

At the next stage the Group and InterMedia prepared draft Basic Flow Chart for the cultural sector, universally representing the processes of creation, production, distribution and operation of CRIA as well as leisure services of all kinds. The flow chart is built based on similar projects by foreign analysts taking into account the special features of the cultural sector in the Russian Federation.

Photo: shutterstock.com / Halfpoint

FIG. 11. BASIC FLOW CHART FOR THE CULTURAL SECTOR



Notes to the Flow Chart

Project of November 06, 2018

The flow chart represents the sequence of processes (from left to right): from planning and creation to the audience. The blocks are located according to similarity of processes where possible. Origination timeline, style and genre succession, economic indicators, etc. are not taken into account in this form of the flow chart.

*Segments offered to be included in the **cultural sector** are marked by colored elements.*

Segments in which results of creative activities are created (produced, copied). As a rule, the Law on Copyright and Related Rights applies to them

Activities related to the use of creative IAR. Both commercial marketing (sales, rent) and free of charge distribution for various purposes (political, advertising, private sharing, web services, etc.) are included in them. These activities are not creative but often being an inalienable part of creative industries, providing their economic basis. The Law on Copyright and Related Rights applies to some of them

Kinds of cultural activities not related to using creative IAR

Framework

Segments in which collective management of rights is used

Important ties originating in the course of work's production and its way to the audience are indicated by arrows. Less important ties are not indicated but it is supposed that currently practically all sectors in culture are interrelated.

***Advertising industry** is based on the technical placement procedure, at the expense of which its turnovers are formed, in view of that only its first stage – production of all kinds of advertising content – is referred to creative industries.*

***The IT industry** is household electronic appliances and other equipment, providing delivery of creative content, access to digital networks, software, web and operator's resources, data centers, social networks, messengers, other content delivery systems.*

Activities of state and local bodies of authority, educational, non-governmental and other organizations related to creativity and leisure, are not presented in the flow chart as they are an inalienable part of all indicated kinds of activities.

Regulators

- *Ministry of Culture*
- *Ministry of Economic Development*
- *Ministry of Digital Development, Communications and Mass Media*
- *Ministry of Industry and Trade*
- *Ministry of Construction Industry, Housing and Utilities Sector*
- *The Federal Archival Agency*
- *No regulator*
- *Partly regulated*

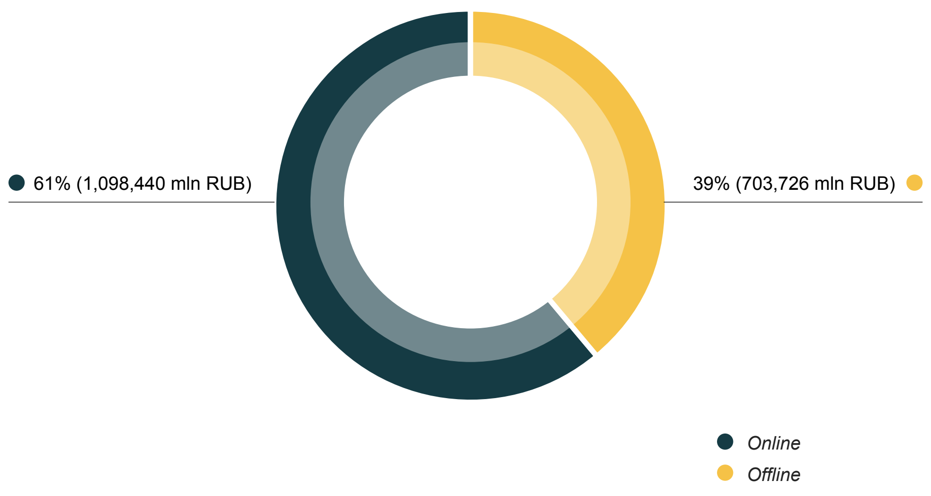
Source: InterMedia

CALCULATION OF CREATIVE INDUSTRIES' TURNOVERS IN 2017

After determining the structure and drawing up the flow chart, the Group got down to perfecting the methods for calculation of turnovers of cultural industries' segments. The task was complicated by the fact that the official statistics of the Russian Federation either does not take into account a number of important creative industries' segments at all, or reflects them in fragments. E.g., the Russian Federal State Statistics Service (Rosstat) publishes data on theatres, circuses, zoos, etc. but does not mention concerts, distribution of audio and video records, use of music as it is on the whole, most kinds of design, non-state galleries, ticket services, etc. (The exception is figures for film industry development which have been published by the Cinema Fund for several years already at the level of world standards.) In view of that, the data from analytical companies, funds, sector associations, etc., as well as expert assessments were used for the calculations.

The Group worked out the method for calculation of the sector's turnovers for the first time in this country objectively representing the sector's current condition. The results of the research demonstrated that the cultural industries' contribution into the economy of the Russian Federation is more than RUB 2 trillion. The cinema, mass media, concerts turnovers are considerable but the biggest part of revenues like all over the world is currently generated in the digital environment, the general cultural agenda is formed there as well.

Fig. 12. Revenues from Commercial Activities of Cultural Industries' Online and Offline Segments, 2017, %

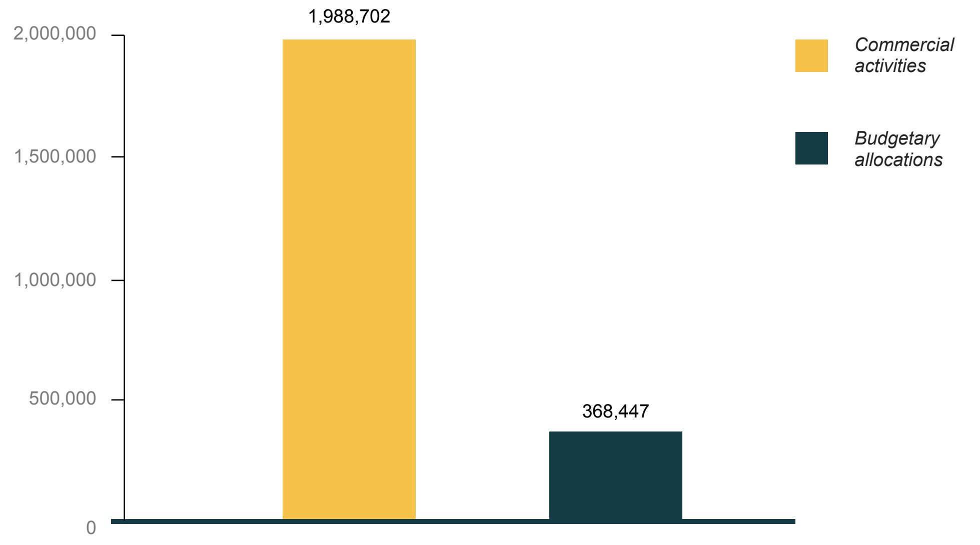


Source: InterMedia

The Group's research confirmed that the special feature of the cultural economy in the Russian Federation is the traditionally significant role of federal, regional and local bodies of authority, performing not only as regulators but also owners of the absolute majority of organizations in the sector – theatres, circuses, concert grounds, creative collectives, museums, libraries. In many cases this complicated application of traditional analytical tools. It should be noted that practically all organizations, financed from state and local budgets, are unprofitable.

As for non-state organizations, they mostly act in such segments as mass media, book publishing, film screening, mass concerts and a number of others. The owners of these companies (often in the form of one-man business) are mostly natural persons – citizens of the Russian Federation, the share of foreign capital in private organizations is unimportant.

Fig. 13. Revenues from Commercial Activities and Amounts of Budgetary Allocations, 2017, mln RUB.

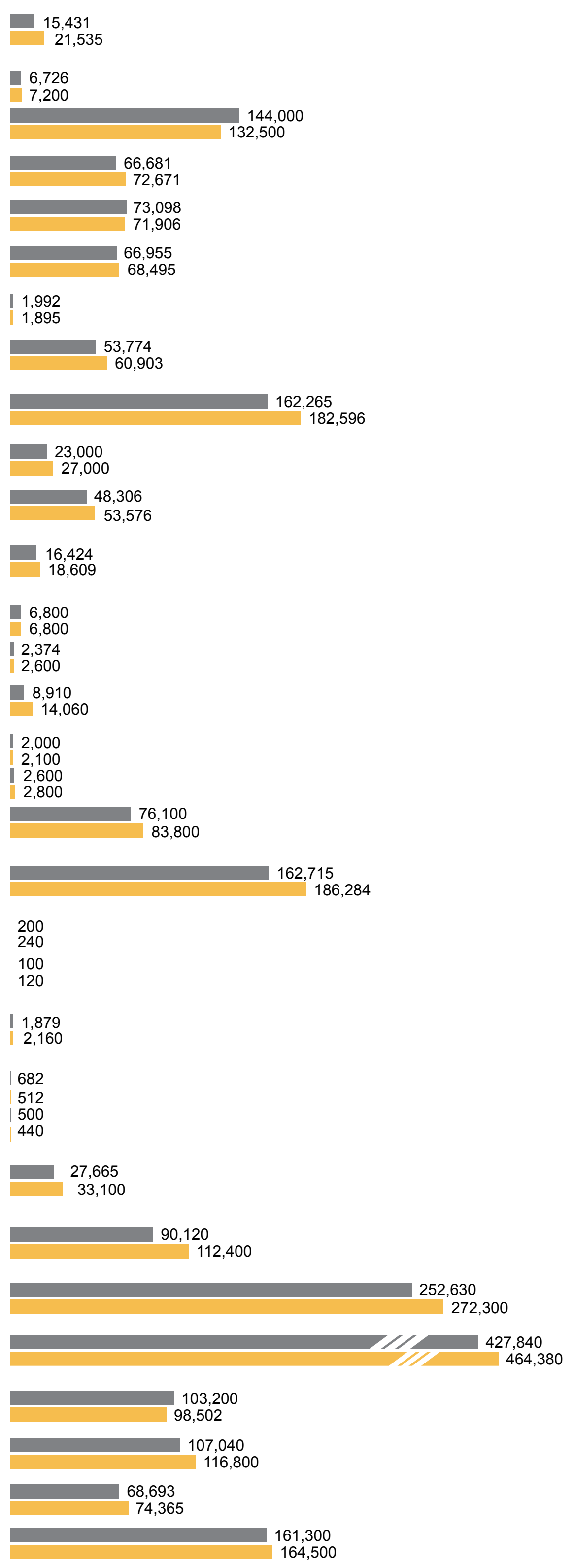


Source: InterMedia

The cinema, mass media, concerts turnovers are considerable but the biggest part of revenues like all over the world is currently generated in the digital environment, the general cultural agenda is formed there as well

Fig. 14. Cultural Industries' Turnovers in the Russian Federation in 2016–2017, mln RUB

Segment	Details	Sources	2016			2017		
			CA	BA	Total	CA	BA	Total
Fine arts and design	Revenues from Russian art sales on the territory of Russia, industrial design works, budgetary allocations for development of engineering and industrial design	ARTinvestment, InArt, Russian Federal State Statistics Service, Ministry of Industry and Trade of Russia, InterMedia	8,401	7,030	**15,431**	13,915	7,620	**21,535**
Arts and crafts	Revenues from making handicraft articles and budgetary allocations	Ministry of Industry and Trade of Russia, InterMedia	5,572	1,154	**6,726**	6,000	1,200	**7,200**
Architecture	Revenues from design work in industry and civil construction	Simple Analytics, InterMedia	144,000	n/a	**144,000**	132,500	n/a	**132,500**
Museums	Museums' revenues from commercial activities and budgetary allocations	Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture	16,806	49,875	**66,681**	18,429	54,242	**72,671**
Printed media	Revenues from sales and advertising. Revenues from advertising sales in online media are not included	PricewaterhouseCoopers, 362-Federal Law	69,509	3,589	**73,098**	68,466	3,440	**71,906**
Books	Revenues from book sales (book, e-book, audio-book sales). Bookshop revenues from non-book retail sales, including FMCG sales are not included.	Federal Agency for Press and Mass Communications, InterMedia	66,770	185	**66,955**	68,330	165	**68,495**
Archives	Budgetary allocations from the Federal Archival Agency	Federal Archival Agency	n/a	1,992	**1,992**	n/a	1,895	**1,895**
Libraries	Library incomes from commercial activities and budgetary allocations	Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture	1,017	52,757	**53,774**	1,138	59,765	**60,903**
Poster-advertized events	Revenues from concerts, performances, shows of all kinds with performers' participation – ticket sales, etc.; budgetary allocations from all-level budgets to circuses, concert organizations and theatres	InterMedia, Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture	84,200	78,065	**162,265**	96,000	86,596	**182,596**
Non-poster-advertized events	Revenues from private, state, corporate events (costs of the creative part only)	InterMedia	23,000	n/a	**23,000**	27,000	n/a	**27,000**
Cinema	Revenues from ticket sales to films in distribution	Cinema Fund, InterMedia	48,306	n/a	**48,306**	53,576	n/a	**53,576**
Radio	Revenues from radio stations advertising and budgetary allocations according to the Federal special purpose program "TV and Radio Broadcasting Development in the Russian Federation in 2009–2018"	Association of Russian Communications Agencies, Federal Agency for Press and Mass Communications, Federal special purpose program	15,100	1,324	**16,424**	16,900	1,709	**18,609**
Ringback tone (RBT)	Revenues from Ringback tone service sales by mobile network operators	InterMedia	6,800	n/a	**6,800**	6,800	n/a	**6,800**
Legal audio services	Revenues from legal audio services (downloading/uploading, streaming)	IFPI, InterMedia	2,374	n/a	**2,374**	2,600	n/a	**2,600**
Legal video services	Revenues from legal video services (downloading/uploading, streaming, AVOD, SVOD, TVOD, EST). Revenues of subscription TV operators from VOD not included (included in "Subscription TV")	J'son and Partners	8,910	n/a	**8,910**	14,060	n/a	**14,060**
Illegal audio services	Revenues of illegal audio services, including torrents, from advertising and subscription	InterMedia, Group-IB	2,000	n/a	**2,000**	2,100	n/a	**2,100**
Illegal video services	Revenues of illegal video services, including torrents, from advertising and subscription	InterMedia, Group-IB	2,600	n/a	**2,600**	2,800	n/a	**2,800**
Subscription TV	Revenues from linking up subscription TV (IPTV, satellite TV, cable TV), including VOD	TMT Consulting, InterMedia	76,100	n/a	**76,100**	83,800	n/a	**83,800**
Television	Revenues from television advertising and budgetary allocations according to the Federal special purpose program "TV and Radio Broadcasting Development in the Russian Federation in 2009–2018"	Association of Russian Communications Agencies, Federal Agency for Press and Mass Communications, Federal special purpose program	150,800	11,915	**162,715**	170,900	15,384	**186,284**
Image licensing	Revenues from licensing images of music, cinema, theatre stars and stars from other creative industries for advertising	InterMedia	200	n/a	**200**	240	n/a	**240**
Music licensing	Revenues from music licensing for advertising, television, etc.	InterMedia	100	n/a	**100**	120	n/a	**120**
Incomes from public catering establishments, transport, trade	Deductions to CMOs (Collective Management Organizations) for using music from public catering establishments, sales outlets, transport, service companies, etc.	Russian Authors' Society, World Intellectual Property Organization	1,879	n/a	**1,879**	2,160	n/a	**2,160**
Physical media (music)	Revenues from physicial media (music) sales	IFPI, InterMedia	682	n/a	**682**	512	n/a	**512**
Physical media (video)	Revenues from physical media (films, videos) sales	InterMedia	500	n/a	**500**	440	n/a	**440**
Data centers	Data centers' revenues on the territory of Russia, including providing cloud services. Revenues from data processing services amounted in 2017 to RUB 23.6 billion, from cloud services – RUB 42.6 billion. 50% of these amounts are included into creative industries' turnover	TMT Consulting	27,665	n/a	**27,665**	33,100	n/a	**33,100**
Online advertising	Internet resources' revenues from advertising in 2017 – RUB 224,800 mln, 50% of this amount are included into creative industries' turnover	Russian Association of Electronic Communications, InterMedia	90,120	n/a	**90,120**	112,400	n/a	**112,400**
Internet access	Providers' revenues in 2017 from providing Internet access – RUB 389 billion, 70% of this amount are included into creative industries' turnover	TMT Consulting, InterMedia	252,630	n/a	**252,630**	272,300	n/a	**272,300**
Consumer Electronics	Revenues from sales of consumer electronics equipment in 2017 amounted to RUB 663.4 billion. 70% of this amount are included into creative industries' turnover	Euromonitor	427,840	n/a	**427,840**	464,380	n/a	**464,380**
Education in cultural sector	Revenues from commercial activities of arts educational institutions of the sector (arts higher educational establishments, vocational educational institutions and children's schools) and budgetary allocations	Russian Ministry of Culture, InterMedia	20,100	83,100	**103,200**	20,300	78,202	**98,502**
Video games	Revenues of developers of games for computers, consoles and mobile devices	PricewaterhouseCoopers	107,040	n/a	**107,040**	116,800	n/a	**116,800**
Culture and leisure institutions	Revenues of culture and leisure parks, zoos, institutions from commercial activities, budgetary allocations	Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture	15,035	53,658	**68,693**	16,136	58,229	**74,365**
Tourism	Revenues from providing tourist services, hotel services and similar accommodations for the people	Federal Agency of Tourism, InterMedia	161,300	n/a	**161,300**	164,500	n/a	**164,500**
Total			**1,837,356**	**344,644**	**2,182,000**	**1,988,702**	**368,447**	**2,357,149**



Notes:

1. CA – commercial activities
BA – budgetary allocations

2. The research methods and data collection system are being advanced and perfected all the time, data verification and checking up in various sources will go on till the end of 2018. We'll be grateful for any updated or corrected data, suggestions and comments to methods and sources.

3. The budget allocation amounts were received from official sources, in some cases distribution per sectors was done based on expert examinations.

4. Shares of revenues by a number of IT industry sectors related to consumption of creative IAR were included in the calculations. At the same time, coefficients were used worked out basing on respective data from analytical companies (examples of such data see on page 22).

5. The following is not taken into account in the calculations:
5.1. the part of revenues received in the Russian Federation by network online services – divisions of international monopolies Alphabet and Apple (ITunes, Apple Music, YouTube and others);
5.2. turnovers of the following segments: restoration, photography, production of advertising content;
5.3. subsidies for organizations from all-level budgets, crediting, investing, donations to private companies from owners and shareholders (except the lines where this is set forth separately).

6. The "consumer electronics" segment includes:
6.1. Computers and peripherals (desktops, portable computers, monitors, printers);
6.2. In-car entertainment (players, radio stations, navigators, acoustic system speakers). Pre-installed at the plant or dealer's devices are not included;
6.3. In-home consumer electronics (home audio and cinema, home video);
6.4. Portable consumer electronics (cameras, camcorders, mobile phones, wearable electronics, and portable media players). Products designed for use in medical, military and any other profession such as diving are excluded.

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ANNEX 1. DEFINITIONS OF CULTURAL INDUSTRY AND ITS STRUCTURE IN VARIOUS COUNTRIES OF THE WORLD

Countries	Australia	Austria	United Kingdom	Germany	Denmark	India	Indonesia	Spain	Italy
Segments / Officially accepted terminology in the country	Creative Industries	Creative industries	Creative industries	Cultural and creative industries	Cultural industries / Experience economy	Media and entertainment industries	Creative industries	Culture sector	Cultural and creative industries
Architecture	•	•	•	•	•		•	•	•
Film and video	•	•	•	•	•	•	•	•	•
Archives		•						•	•
Libraries		•						•	•
Museums		•		•				•	•
Heritage sites and places		•						•	•
Broadcasting (radio and TV)	•	•	•	•	•	•	•	•	•
Performing arts (theatre, dance, festivals)	•	•	•	•	•		•	•	•
Design (product, fashion, graphics)	•	•	•	•	•		•		•
Visual arts, crafts and art market	Includes only creation of works of art	Included into Vienna mapping studies, 2004	•	•	•		•	•	
Publishing (books, press, journals)	•				•		•	•	
Music industry	•	Included in performing arts	•	•	•	•	•	•	•
Software, computer games, multimedia	•	•	•		•		•	•	•
Advertising	•	•	•	•	•	•	•	•	•
Cyber cafes, Internet access providers									
Satellite services, network operators									
Photography retail									
Drugs and medicine									
Wooden furniture and fixtures									
Animation, video effects (VFX), gaming, casinos						•			
Community and government activities (religious, cultural, education) / Public administration								•	
Research and development							•		
Jewellery and related activities									
Education and training, consulting		•						•	
Cultural-educational activities									
Recreation, entertainment and other cultural activities					•				
Botanical gardens and zoos					•			•	
Discos, night clubs									•
Wine and food industry									•
Audio industry (manufacturing of radios and TV, retail trade of radio and TV equipment)		Included into Vienna mapping studies, 2004						•	
Sport industries					•			•	
Interdisciplinary activities								•	
Tourism					•			•	
Toys/amusement								•	
Other auxiliary activities		•						•	

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Annex 1. Definitions of Cultural Industry and its Structure in Various Countries of the World (continued)

Countries / Segments	China, Hong Kong	Latvia	Lithuania	Macedonia	New Zealand	Norway	Poland	Serbia	Singapore
Officially accepted terminology in the country	Creative Industries	Creative industries	Creative industries	Creative industries	Creative industries / Creative sector / Cultural industries	Cultural industries	Culture sector and creative industries	Creative industries / Creative sector	Creative industries / Distribution industries
Architecture	•	•	•	•	• / • / ○	•	•	•	• / ○
Film and video	•	•	•	•	• / • / •	•	•	•	Includes performing arts
Archives		•	•	•			•	•	
Libraries		•	•	•	○ / ○ / •		•	•	• / ○
Museums		•	•	•	○ / • / •		•	•	• Includes performing arts / •
Heritage sites and places		•	•	•			•	•	Included in performing arts
Broadcasting (radio and TV)	•	•	•	•	• / • / •	•	•	•	• / ○
Performing arts (theatre, dance, festivals)	•	•	•	•	• / • / •	•	•	•	• / ○
Design (product, fashion, graphics)	•	•	•	•	• / ○ / ○	•	•	•	• / ○
Visual arts, crafts and art market	•	Fine arts	Fine and applied arts, heritage	•	• / • / •	•	•	•	• / •
Publishing (books, press, journals)	Includes printing and binding			•	• / • Includes printing and binding/ •	•	•		• / •
Music industry	•	•	•	•	• / • / •	•	•	•	• / •
Software, computer games, multimedia	•	Entertainment IT	Entertainment IT	•	• / • / ○	•		•	• / ○
Advertising	•	•	•	•	• / • / ○		•	•	• / ○
Cyber cafes, Internet access providers	•								• / ○
Satellite services, network operators									• / ○
Photography retail									• / ○
Drugs and medicine									
Wooden furniture and fixtures									
Animation, video effects (VFX), gaming, casinos									
Community and government activities (religious, cultural, education) / Public administration					•				
Research and development								•	
Jewellery and related activities	•				•				
Education and training, consulting			•	Only foreign language schools				•	
Cultural-educational activities		•		•					
Recreation, entertainment and other cultural activities		•							
Botanical gardens and zoos			•						
Discos, night clubs									
Wine and food industry									
Audio industry (manufacturing of radios and TV, retail trade of radio and TV equipment)							•		
Sport industries									
Interdisciplinary activities									
Tourism				•					
Toys/amusement							•		
Other auxiliary activities									

Annex 1. Definitions of Cultural Industry and its Structure in Various Countries of the World (continued)

Segments \ Countries	Slovenia	Thailand	Finland	France	Switzerland	Estonia
Officially accepted terminology in the country	Creative industries	Creative Industries	Culture sector	Cultural industries	Creative industries	Creative industries
Architecture	•		•		•	•
Film and video	•	•	•	•	•	•
Archives	•		•		•	•
Libraries	•		•		•	•
Museums	•		•			•
Heritage sites and places	•		•		•	•
Broadcasting (radio and TV)	•	•	•	•	•	•
Performing arts (theatre, dance, festivals)	•		•		•	•
Design (product, fashion, graphics)	•	Only jeweler's arts and related activities	•		•	•
Visual arts, crafts and art market	•		•		•	Fine and applied arts
Publishing (books, press, journals)	•	•	•		•	
Music industry	•		•	•	•	•
Software, computer games, multimedia					•	Entertainment IT
Advertising		Partly included in broadcasting and publishing	•		•	•
Cyber cafes, Internet access providers						
Satellite services, network operators						
Photography retail						
Drugs and medicine		•				
Wooden furniture and fixtures		•				
Animation, video effects (VFX), gaming, casinos						
Community and government activities (religious, cultural, education) / Public administration						
Research and development		•				
Jewellery and related activities						
Education and training, consulting			•		Only music schools, included into musical industry	
Cultural-educational activities						
Recreation, entertainment and other cultural activities	Only "other cultural activities" included		•			
Botanical gardens and zoos	Included into "other cultural activities"		•			
Discos, night clubs					Included into musical industry	
Wine and food industry						
Audio industry (manufacturing of radios and TV, retail trade of radio and TV equipment)					•	
Sport industries						
Interdisciplinary activities						
Tourism						
Toys/amusement						
Other auxiliary activities					•	

Source: UNESCO

Notes:
The "musical industry" term may in various countries include sound recording industry, publishing business and concert business in various combinations.

Symbols and key words:
• – Yes ∘ – No

ANNEX 2. CHARACTERISTICS OF SOME IMPORTANT SEGMENTS OF CREATIVE INDUSTRIES IN THE RUSSIAN FEDERATION

Fig. 15. Performing Arts Industry

Number of venues where events, for which tickets are sold, are held	4,400
Total number of places on a venue	4,300,000
Number of organizations managing concert halls	3,000
Number of entertaining events' organizers	4,400
Number of performers (groups and actors)	7,300

Source: InterMedia

Fig. 16. Film Industry

Number of movie theatres	1,612
Number of cinema halls	4,930
Number of released films (total)	472
Number of released Russian films	123

Source: Cinema Fund

Fig. 17. Culture and Leisure Institutions of All Departments, Including the Russian Ministry of Culture

Number of culture and leisure institutions	42,015
Number of mass cultural events	8,299,971
Number of mass cultural events on a fee-paying basis	2,404,990

Source: Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture

Fig. 18. Culture and Leisure Parks

Number of culture and leisure parks	305
Number of concert venues and pavilions in parks	572
Number of mass cultural as well as physical and health-improving events in parks	73,826

Source: Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture

Fig. 19. Zoos

Number of zoos	31
Number of individual visits to zoos, thousand people	8,326.3
Number of visits for tours, thousand people	192.9
Number of lectures in zoos	6,944
Number of animals in zoos	81,695

Source: Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture

Fig. 20. Museums of All Departments, including the Russian Ministry of Culture

Number of museums and branches	2,742
Total museum collections, exhibits	89,197,020
Number of cultural heritage properties	11,253
Number of individual visits to exhibitions and displays, thousand people	78,766.3
Number of visits for tours, thousand people	38,644.9
Number of lectures in museums	156,591
Number of mass events in museums	147,328
Number of exhibitions	78,952

Source: Chief Information and Data-Processing Computer Center of the Russian Ministry of Culture

Fig. 21. Television

Share of the Russian Federation population, capable to receive over-the-air digital channels, %	98.3
Average number of TV channels in urban households	64
Average daily TV-watching time (HH:MM)	04:02

Source: Federal Agency for Press and Mass Communications (Rospechat)

Fig. 22. Books

Number of book and booklet titles	117,359
Number of new editions	102,922
Total number of copies, mln copies	471.5
Number of book publishing houses	5,775

Source: Federal Agency for Press and Mass Communications (Rospechat)

Fig. 23. Radio

Number of radio stations	767
Number of radio stations with completely own programming	457

Source: Federal Agency for Press and Mass Communications (Rospechat)

Fig. 24. Consumer Electronics

Sales of consumer electronics, thousand pcs:	59,301.2
– Computers and peripherals (desktops, portable computers, monitors, printers)	8,055.8
– In-car entertainment (cassette players, in-car radio players, in-car CD players and in-car DVD players, in-car navigation, in-car speakers). Factory and dealer installed systems are excluded	1,632.9
– In-home consumer electronics (home audio and cinema (audio separates, home cinema & speaker systems, Hi-Fi systems and other home audio & cinema), home video (televisions and video players))	6,751.0
– Portable consumer electronics (cameras, camcorders, mobile phones, wearable electronics, and portable media players (e-readers and portable media players)). Products designed for use in medical, military and any other profession such as diving are excluded	42,861.6

Source: Euromonitor

Photo: shutterstock.com / rangizzz

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Editorial Board

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