

## An Overview of the Current Situation of the Creative Industries in Pécs, Hungary

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### Abstract

*The creative industry, as a concept, first appeared at the beginning of the 21st century in an American book, written by Richard Florida (2002) and in a report, written in the UK (DCMS, 2001.). Today it is not a question anymore that the creative industry will play a huge part in the European Union's future economy, as one of the main pillars of the current European planning period (between 2014-2020, with a budget of €1.46 billion) called 'Creative Europe'. Hungary as a knowledge society has to deal with the question of the creative economy in the future.*

*The article is going to give an overview on the different definitions and classifications of the creative economy, and a short summary on the creative industry written by Florida., Scott, Howkins and many others. As there is no unified approach to define creative economy and creative industries, it makes doing researches (or even analyze or compare different researches) more complicated.*

*The main aim is to make an overview of the current situation of the creative industry in Pécs city, Hungary, based on previously conducted reports and surveys, and also to outline the results of my own findings. My research is based on a statistical analysis of the creative industry in Baranya County and in Pécs, data was provided by the Hungarian Central Statistical Office for the years: 2007; 2009 and 2011, from which we see how the situation of the creative companies changed during the past years.*

**Key words:** creative economy, creative industry, regional analysis, Hungary

**JEL Classification:** Z1

### 1 Introduction

The concepts of the creative industry and the creative economy rise and gone worldwide in the early 2000s, when Richard Florida published the book: "The rise of the Creative Class" in 2002. In the previous year the Department for Culture, Media and Sport in the UK analyzed the UK's business clusters (DCMS, 2001a) and later this year defined the creative industries and analyzed UK's output (DCMS, 2001b). UK is still ahead in Europe in the creative economy researches.

Nowadays the definition of creative economy and creative industry is not unknown to the Hungarian researchers either (Egedy - Kovács 2008., 2009.; Kovács 2007.; Kovács 2009.; Kovács et al. 2007.; Lengyel - Ságvári 2009.; Rittgasszer 2009.; Ságvári – Lengyel 2008, Miszlivetz et el. 2012), however there are still many questions in the regional aspect to be answered. In this article I am going to briefly describe some of the definitions of the creative economy, as the current interpretation is quite diverse. The article aims to provide an overview of

the creative industries among the different definitions and show the current situation of the creative industries in Pécs, Hungary by shortly analyzing some of the previously made documents and conducted surveys.

My own research is based on a statistical analysis of the creative industry in Pécs, data was provided by the Hungarian Central Statistical Office for the years: 2007; 2009 and 2011, from which we see how the situation of the creative companies changed during the past few years. I also made several in-depth interviews with experts to help me find an answer the following research questions: Which are the most significant sectors, which could make a bigger share? Which sectors should be focused on if the goal is to produce a bigger economic profit? This article aims to provide a summarize of the results of the past researches and to give an overview on the empirical research status, so the research can be moved to the next level, and a survey can be conducted within the creative companies.

## 2 The Concept of the Creative Economy

As globalization has changed the world, it has changed the fore of the economic cause and effect relationships as well. Previously only those regions and nations could be competitive, which had the adequate resources for production. In the globalized world the dependency from those resources decreased, and the focus has shifted more from the natural resources to human resources. The expression of creative society has appeared, and nowadays it is presented more in more in the different literatures and surveys. This shows that creativity as a concept is now included in everyday life and vocabulary not just as an individual competence but as an economic driving force as well. The concept of creative economy appeared in Europe in the late 90s in the United Kingdom first. The perceptions appeared since are more or less different from each other, which is quite a problem. As there is no unified framework, the different analyzes and surveys are using different methods, therefore it is not possible to make comparison using them. Another problem is, that the statistical database on creative industries are very incomplete on national and international level as well. Many times the sectors of these industries were putting in the “other” part, therefore making a proper analyzes from this data is very difficult, in many countries is not feasible at all.

Before creative economy, the phrase cultural economy was only used, first by Alan Scott in 1997. (Scott, 1997.) In his work he divided cultural economy into two groups: traditional cultural services and cultural industry product categories. Most of the cultural services in his opinion were provided and maintained by the state, such as education, public culture and art services. But in the concept of creative economy has been highlighted in the previous years, so now I will give a short overview on the various definitions and examine the differences and similarities between them.

- Richard Florida does not provide a clear definition on the creative economy, however he point out that knowledge and information society is subordinated to creativity, which becomes the driving force of the economy. More specifically, he is focusing not on the industries, but the creative people. He assumes that the creative workforce will be the main driver of the economy. According to Florida not the economy itself, but the creative people, the so called “creative class” gets the main role in the future. (Florida, 2002.) In this article I am focusing on the creative industries perspective.

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- In Howkins opinion (Howkins, 2004.) the creative economy brings off transactions belonging to creative products. Each transaction may involve two complementary values: one which is intangible, intellectual property and one potential physical media or background. (Howkins, 2004.)
  - In my dissertation I am planning the use the survey of the „Accommodating Creative Knowledge” project – in further discussion ACRE -. The researchers of ACRE interpreted the creative economy as the following: the creative economy can be divided into different industries. The creative economy contains the creative industries – with all the cultural industries as well – and those knowledge intensive industries, which have a relatively high creative content – such as information communication, finance, law and business services, R&D and higher education. (Musterd et al. 2007.)
  - The definition in the Creative Economy report made by UNCTAD (United Nations Conference on Trade and Development) is the following: “The concept of the “creative economy” is an evolving one that is gaining ground in contemporary thinking about economic development. It entails a shift from the conventional models towards a multidisciplinary model dealing with the interface between economics, culture and technology and centered on the predominance of services and creative content. Given its multidisciplinary structure, the creative economy offers a feasible option as part of a results-oriented development strategy for developing countries. It calls for the adoption of effective cross-cutting mechanisms and innovative interministerial policy action.” (United Nations, 2008. p. 4.)
  - In my research I use the definition and methodology, which was published in the DCMS statistical report on creative economy in early 2014. DCMS defines creative economy as the following: “The Creative Economy, which includes the contribution of those who are in creative occupations outside the creative industries as well as all those employed in the Creative Industries.” (DCMS, 2014 p. 5.) In this definition, the creative economy is defined not by the industries, but by the people, who are working as “creatives”.

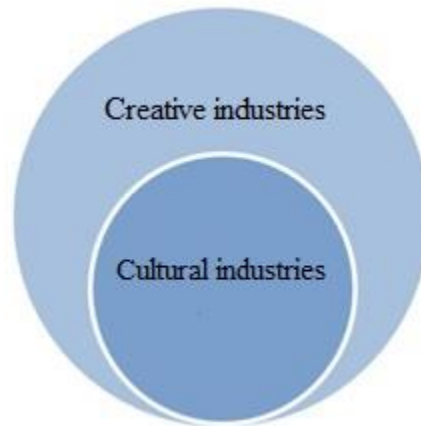
To summarize it, as Howkins is focusing on transaction and creative products, UNCTAD focuses on the interaction between economy-culture-technology, the last definition is closer to Florida’s perception, but also agrees with the researchers of ACRE, that creative economy is bigger than the sum of the creative industries. While ACRE would complement the creative economy with other industries, which require high knowledge aggregation, DCMS would put the focus to individuals and individual creativity, regardless of industries.

In my current analysis and my future surveys I will focus on creative industries, and will examine in details the situation of these businesses in Pécs, Hungary.

### **3 The Definition of Creative Industries**

After making an overview of the definition of the creative economy, it is also important to analyze what is considered in the literature as creative industries, as creative industries will be the basis of my research. It is important to note, that creative industries are often discussed with the cultural industries in the different literatures. But the article will only focus on the aspects of creative industries.

In 2005, an EU policy paper was published: “The future of the creative industries”, which discuss the cultural and creative industries together. In this interpretation, the cultural industries are a kind of subset of the creative industries, which is illustrated on figure 1.



**Fig. 1 Relationship between cultural and creative industries**

Source: Own edition

The definition of the creative industries, according to the UNCTAD survey: “can be defined as the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs. They comprise a set of knowledge-based activities that produce tangible goods and intangible intellectual or artistic services with creative content, economic value and market objectives”. (United Nations, 2008. p. 4.)

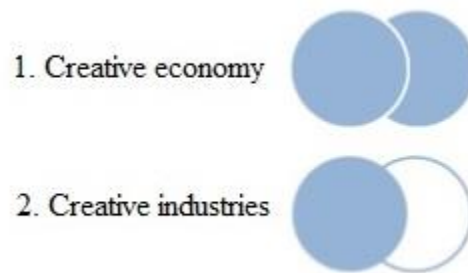
Potts and his co-authors define the creative industries in their article on the basis of the social media market. “A new social network-based definition of the creative industries may be proposed as such:

- The set of agents and agencies in a market characterized by adoption of novel ideas within social networks for production and consumption.

In this view, the CIs are not the subsidies arts, although such sectors are routinely incorporated (e.g. performing or fine arts or heritage). They are also not the cultural industries, although again, there is some significant overlap (e.g. fashion, media, music). Neither are they firms alone, since cultural and educational agencies are active players.” (Potts et al. 2008 p. 172.)

The EU Green Paper in 2010 defined the creative industries as the following: “Creative industries” are those industries which use culture as an input and have a cultural dimension, although their outputs are mainly functional. They include architecture and design, which integrate creative elements into wider processes, as well as subsectors such as graphic design, fashion design or advertising. (European Commission 2010, p. 6.)

According to 2014 report of DCMS: „The Creative Industries, a subset of the Creative Economy which includes only those working in the Creative Industries themselves (and who may either be in creative occupations or in other roles e.g. finance).” (DCMS, 2014 p. 5.)



**Fig. 2 Relationships between creative economy and creative industries**

Source: DCMS, 2014. *Creative Industries Economic Estimates January 2014*. Downloaded: 15.05.2014.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/271008/Creative\\_Industries\\_Economic\\_Estimates\\_-\\_January\\_2014.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/271008/Creative_Industries_Economic_Estimates_-_January_2014.pdf)

In overall, some highlights can be made on the creative industries:

- are more than cultural industries, but it also includes them,
- have a creative content and an economic value,
- carry out the creation and distribution of creative goods and services produced and consumed by the society,
- primary input is creativity and intellectual capital.

## 4 The Situation of the Creative Industries in Pécs

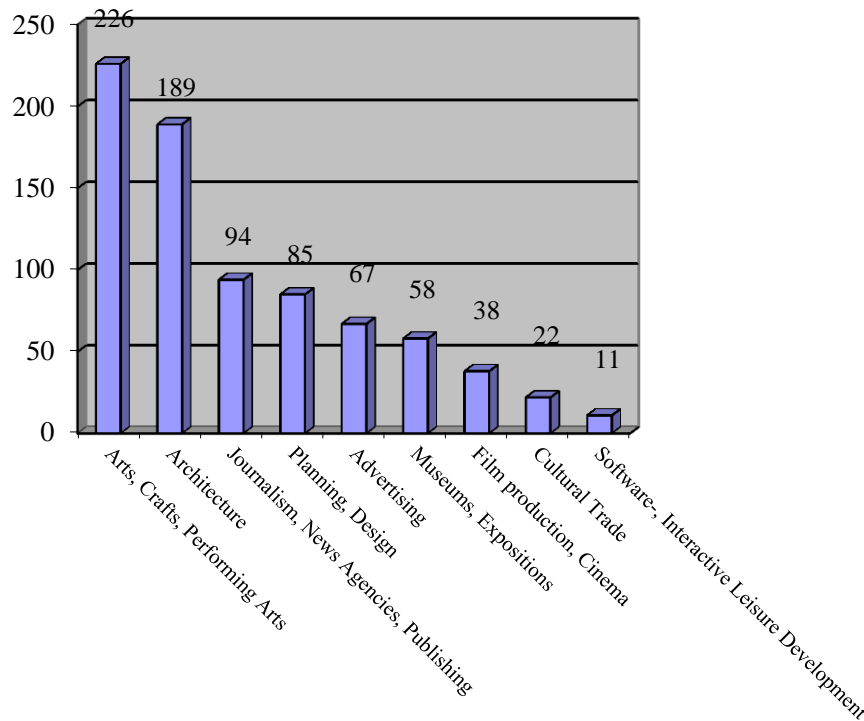
### 4.1 Previous analyzes and surveys

The first document, which mentions creative industries in Pécs, was published in 2004 in the South Transdanubian Regional Innovation Strategy. As described in the document: In the region the professional and academic background of the creative industries are partially given. (“A Dél-Dunántúli...” 2004. p. 161.) In the Pécs Pole Program, which was published in 2005, the concept of the creative industries also appears. The program aims to create a cultural incubator, which should assist the artist and entrepreneurs of Pécs to start their businesses and to make it easier to build effective market relationships.

In 2007, the Cultural Creative Industry Cluster (CCIC) was found in Pécs, which was a large step forward in the life of the city. One of the main objectives of the organization is to strengthen the business relationships with the stakeholders of the creative industries. The cluster was an active participant of the ‘Creative Cities’ European project (<http://www.creativecitiesproject.eu/>), within several studies was made of Pécs city and the region, including a creative industry SWOT analysis.

The analysis examines the businesses operating in Pécs. “25,676 enterprises were registered in the city in 2008, of which 11,272 worked in the form of joint venture. The operating firms in 2007 according to the figures are slightly more than half of all enterprises (53%).” (SWOT analysis, 2010. p. 33.) The study specified NACE codes – which is an industrial classification code -, on which bases it identified the businesses belonging to the creative industries. The CCIC identified 565 businesses, which is a bit more than 4% of all operating companies in Pécs. The

study also concluded that in the creative industries the operating companies are on 73%, which is higher than in other industry's average – which was about 53% only-. (SWOT analysis, 2010.)



**Fig. 3 The division of the particular activities among creative industry businesses (CCIC Association Data)**

Source: „SWOT analysis – Status of the creative industries at Pécs” 2010.

[http://www.creativecitiesproject.eu/en/output/doc-23-2011/SWOT\\_Pecs\\_EN.pdf](http://www.creativecitiesproject.eu/en/output/doc-23-2011/SWOT_Pecs_EN.pdf) Downloaded: 10.04.2013. p. 35

But in another study, also made by the CCIC in 2010, the number of the creative companies is divided as the following.

**Tab. 1 Number of creative companies by sector**

	All	Pécs	Regional
Performing arts	183	107	76
Cultural trade	122	28	94
Media, Publishing, News Agencies	183	103	80
Film production, Cinema	53	38	15
Advertising	109	79	30
Arts	227	142	85
Computer program wiring and computer services	92	18	74
Museums, Exhibitions	103	43	60
Architecture	366	196	170
Design	81	67	14
Instrument industry	4	2	2
Heritage	30	13	17
<b>Sum</b>	<b>1553</b>	<b>836</b>	<b>717</b>

Source: Dél-Dunántúli Kulturális Ipari Klaszter et al.: *Regionális kreatív ipari kataszterelemzés a Dél-Dunántúlon* 2010. p. 39. (Regional creative industry analysis at the South-Transdanubian Region)

Although there are differences in the two classifications, both figure shows that the creative industries main activity in Pécs lies in the art and architectural sectors. The comparison of these two studies clearly shows that the classification method of the creative industries changes frequently in the regional analyzes. It means there is no unified definition and method yet, this area is still developing, which is not bad, but clearly makes the comparison of the different studies difficult.

#### 4.2 Own findings

To my own research it was necessary to define the NACE codes again on the basis of today's literatures and reviews and to require data from the Hungarian Central Statistical Office (CSO). As it was mentioned before, the literature and the industry researches are still in the development phase. I found that the DCMS in the UK is at the forefront of the creative industries research at the European level. The definition of the creative industries published in 2014 includes the previous experiences of the professional literature and gives a comprehensive look of the topic. Therefore when I prepared my research I decided to use their definition. There were identified 31 NACE codes in 9 industries – which were converted according by the Hungarian CSO –. The identified industries are the followings:

- Design: product, graphic and fashion design
- Publishing
- Film, TV, video, radio and photography
- IT, software and computer services
- Architecture
- Advertising and marketing
- Music, performing and visual arts
- Craft
- Museums, galleries and libraries

Through Hungarian CSO the performance of these industries were queried for the years 2007, 2009 and 2011. To be able to make deeper conclusions, I made in-depth interviews with several experts:

- Vice-Dean of the University of Pécs Faculty of Business and Economics
- President of the Cultural Creative Industries Cluster
- Senior Project Manager of the South Transdanubian Regional Innovation Agency
- Chief Architect of the City of Pécs
- Heads of Departments of the Baranya County Government Office for Labor Centre

The following table shows the share of the creative industries in the total economy of Baranya county, as there was no data available only for Pécs city.

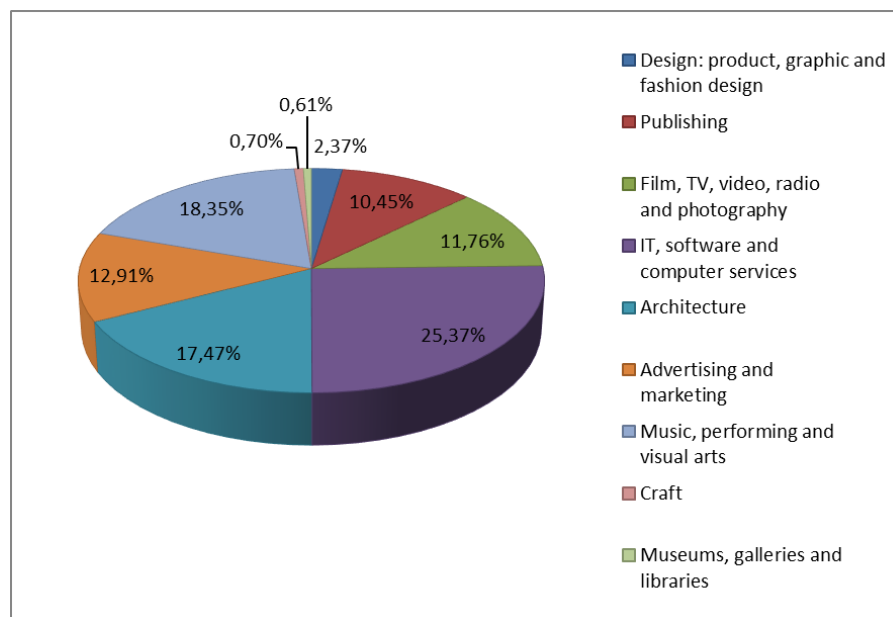
**Tab. 2 The total performance of the creative industries in Baranya county, 2007-2011**

	Number of companies			Number of employees (person)			Total revenue (Million HU)		
	2007	2009	2011	2007	2009	2011	2007	2009	2011
Baranya county total	25 434	25 821	no data	116 645	109 496	104 512	601 108	592 927	no data
Baranya county creative industries	1 066	1 451	1 529	1 807	2 141	2 407	11 645	12 697	11 671
<b>Creative industries in %</b>	<b>4,19%</b>	<b>5,26%</b>	-	<b>1,55%</b>	<b>1,96%</b>	<b>2,3%</b>	<b>1,94%</b>	<b>2,14%</b>	-

Source: CSO, own edition

Between 2007 and 2011 all the indicators regarding the creative industries slightly increased in Baranya County. Although creative industries do not employ significant masses, due to the historical tradition to cultural and creative industries, it is still important to investigate this question.

In 2007: 767, 2009: 1091, and in 2011: 1139 businesses were identified in Pécs, as creative companies. The distribution by sectors in 2011 is illustrated on the graphic below.



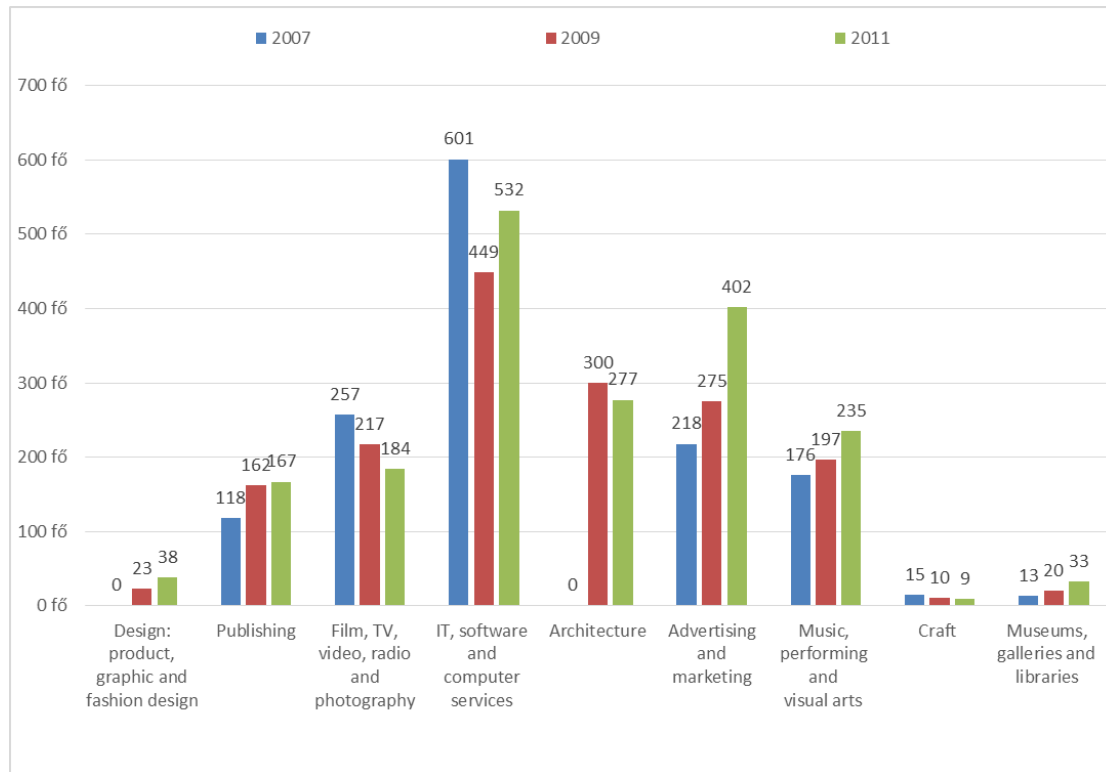
**Graphic 1 The structure of the creative industries in Pécs, 2011.**

Source: own edition

According to the graphic, by company numbers the creative industries can be organized into four groups. The IT, software and computer services sector has the biggest share, over 20% of all industries, about 25,4%. In the second group are the industries between 15-20% share of total number, such as: music, performing and visual arts with 18,3% and architecture with 17,5%. In the following group are the industries with 10-15% share of total. In this group included: advertising and marketing with 12,9%; film, tv, video, radio and photography with 11,8% and publishing industry with 10,4%. In the last group are included the industries with less than 5% share of total number, such as: design: product, graphic and fashion design with 2,4%; jewelry with 0,7% and museums, galleries and libraries with 0,6%. In overall most of the sectors increased their companies' number between 2007 and 2011, only "Film, TV, video, radio and photography" industry and "museums, galleries and libraries" industry suffered a small decline.

While companies' number show a positive reflection, the number of employees shows a more complicated picture.



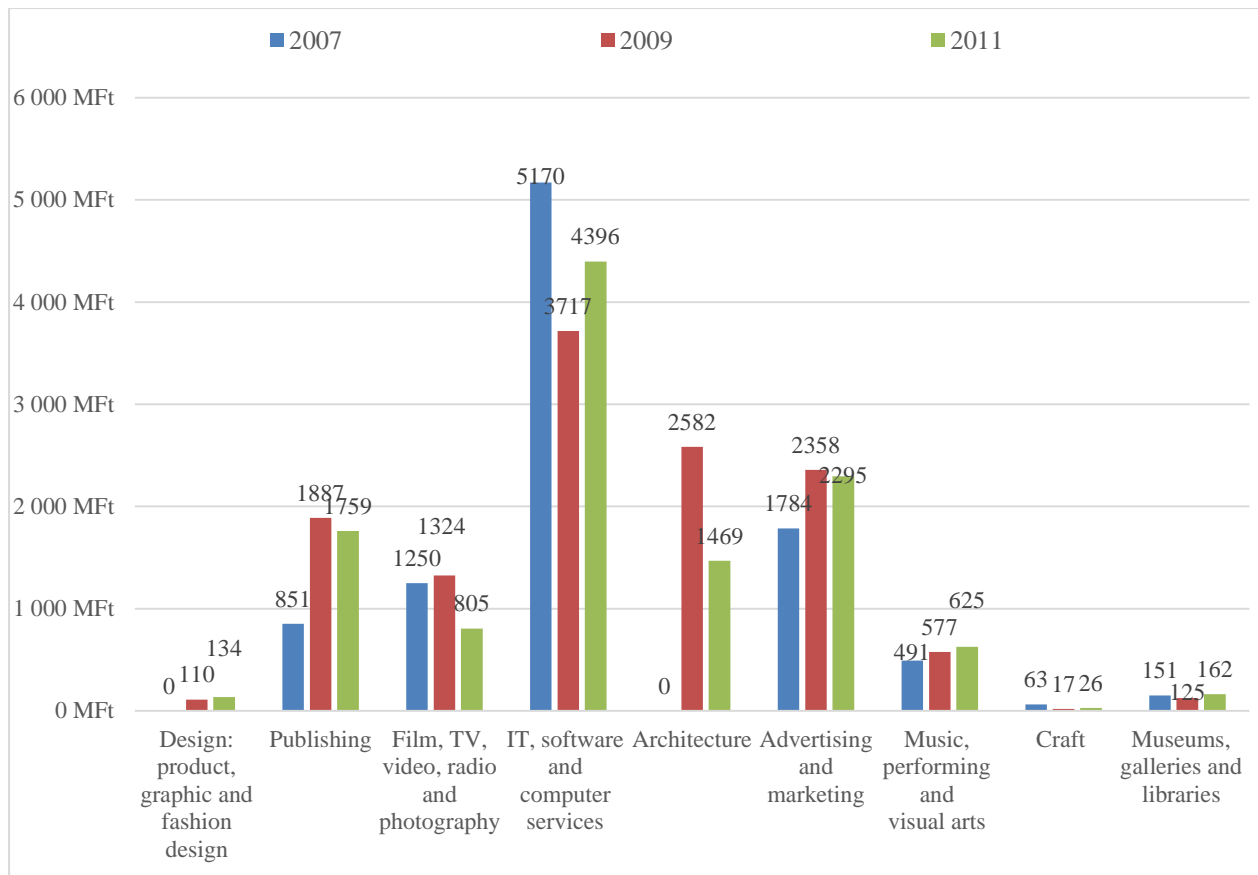


**Graphic 2 The number of employees in creative industries between 2007-2011, Pécs**  
Source: own edition

Looking at the number of employees, a similar conclusion can be made: between 2007-2011 the different industries shows different trends. As it could be anticipated from the companies' number, the biggest employment is in the IT, software and computer services industry. On the contrary, this is the only industry, which had a great downturn in the number between 2007-2009, with one fourth of the employment rate. Although it slightly increased in the period 2009-2011, it still couldn't reach the same level as it was in 2007. As a conclusion, it can be said, that the economic crisis was hard on that industry, but it was capable to regenerate after it. In the case of other industries, the number of employees clearly increased (design; publishing; advertising music or museums, galleries, libraries) or clearly decreased (such as film, tv, video; architecture; jewelry). If we make an average calculation, we find that in most cases this number is between 1 and 3, these companies are mostly micro companies. Only "museums, galleries, libraries" employ 4,7 person in average.

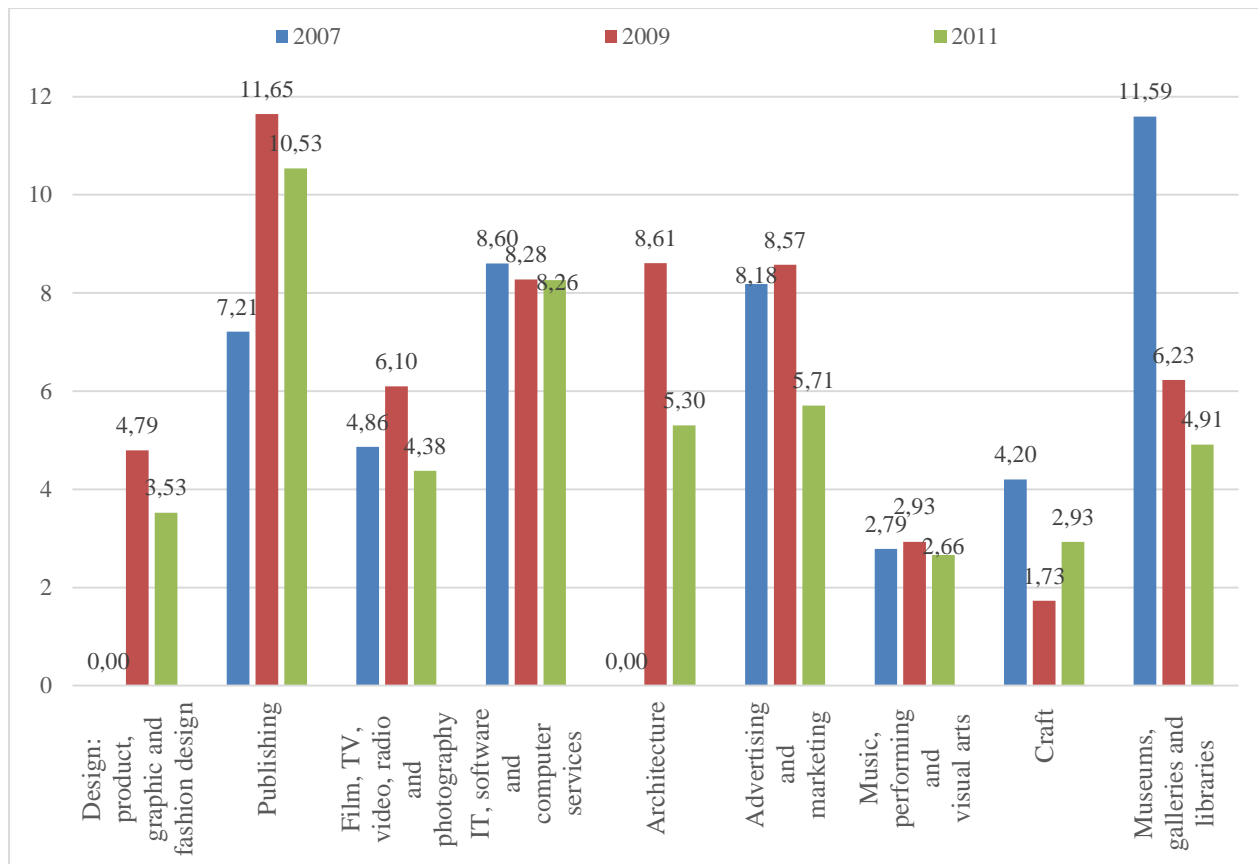
Overall, the economic crisis had a different effect on the different industries, there were no clean trends to read.

The revenue of all creative industries in Pécs were in 2007: 9,75 billion Ft, 2009: 12,69 billion Ft and in 2011: 11,67 billion Ft (approximately 37 Million Euro). The distribution of the revenue among the different industries is illustrated on the following graphic (Graphic 3.)



**Graphic 3 Distribution of the revenue between 2007-2011 (Million Ft)**

As most of the sectors increased their companies' number during the studied interval, this cannot be said about the revenue of the sectors. Revenue of design; music, performing and visual art; museums, galleries and libraries has slightly increased in this period, although film; IT, architecture and craft industries had a decline. Only in case of advertising and publishing industries can talk about a significant increase. As most companies are in the IT sector, it is logic, that IT sector has the biggest part of the creative industries' revenue. To better understand which sectors performed the best, have a look on how the average revenue per employees did between 2007 and 2011. (Graphic 4)



**Graphic 4 Average revenue per employees (Million Ft/ person)**

The biggest revenue/person is in the publishing industry (in 2011: 10,53 Million Ft/person, appr. 33 000 EUR/person). Although in 2007, museums, galleries and libraries had a great revenue, it has decreased a lot till 2011 – almost with two-third of it, which as because government cut many sources back –. Film, advertising and music industries have increased between 2007 and 2009, while between 2009 and 2011 declined a lot, with design and architecture industries as well – which could be due to the financial crisis. IT industry had only a smaller decline. Only craft industry could show increase in the 2009 and 2011 period.

In the in-depth interviews my main aim was to find out what the experts think on the situation of the creative industries in Pécs, and what the future plans should be for those industries – should there be any? -.

The interviews showed that the experts basically consider this topic an important one, and support the development of the creative industries. Only the Representative of the City was a bit sceptical about it, which was explained:

- “There was a sharp discussion about it. Not from the point of the creative industries, but mostly from the point of sustainability. How can we make a balance between the city’s employment profile and the targets. And we decided, if the main aim is to make a growth in the employment rate, then maybe this is not the first priority.”

The other interviewed also agreed, that only creative industries can not be a solution to the problem of the city, because creative industries usually do not employ significant masses. Although they pointed out the importance of these industries, as one good practice to be followed, and a segment which could make the economic palette more colorful and could put Pécs to the international economic map.

- Heads of Departments of the Baranya County Government Office for Labor Centre: „ The creative industry can not employ significant masses, for that we will need other supplement industries.” “It is more difficult to make a larger industry to locate its companies here – because of logistical problems, everything is capital-centered, we need to focus rather on the industries which needs more intellectual capital than materials.”

In the in-depth interviews we discussed the question, which industries are the most dynamic ones and which are worth to develop. The experts pointed out, that we have to decide the target. If we are planning to develop the industries which are able to produce the biggest economic profit, then we have to focus on the “IT, software and computer service” industry. This conclusion is parallel with the result of the CSO database, as the biggest economic value is coming from this industry. Also music industry could be one to follow, as it has a great historical path in the city, too.

If we are looking at other components too, then the experts recommended the industrial design or the design industry in overall, which has a great potential in Pécs, as the city has a big University with different Faculties – which are offering Artistic degrees already, but could widen its range if necessary.

To summarize it: although the creative industries are not the majority of the economic profile, it is – according to the experts and from historical path in Pécs – still worth to deal with it. Although the financial crisis has reached Hungary as well, analyzing the creative industries we can not see clear trends, it is a mix of declines and increases in the different industries, so further investigation is necessary.

## 5 Conclusion

The concept of creative economy and creative industries started its world conquest in 2002, when Richard Florida published his book “The rise of the creative class” (Florida, 2002). Although in Europe, in the United Kingdom the Department for Culture, Media and Sport used the definition creative economy in two of their reports in 2001 (DCMS, 2001a; DCMS, 2001b), it was after the book came out, that more and more scientist began to research specifically about the creative economy, creative industries or the creative class. Today it is not a question anymore that the creative industry will play a huge part in the European Union’s future economy, as one of the main pillars of the current European planning period is (between 2014-2020, with a budget of 1.46 billion Euro) called ‘Creative Europe’. Hungary as a knowledge society has to deal with the question of the creative economy in the future as well.

As the methodology for creative economy and creative industries are still in the development phase – there is not a unified approach which can be used to, and even in same type of reports the

methodology is changing within a short notice -, I found it quite important to give in this article a short overview about some of the literature I processed, and to outline how the method for my research was selected out.

I also aimed to give an overview of the situation of Pécs in two ways: in one I analyzed previously made researches and reports, and in other I used the selected methodology and analyzed companies number and revenues data for the years 2007, 2009 and 2011; based on information provided by Hungarian CSO.

My further research plan is to conduct a survey among the workers of the creative industries in Pécs, which will analyze their attitudes about satisfaction with the city, job and work environment and about neighborhood and residence.

## Acknowledgements

I would like to thank for the Regional Policy and Economics Doctoral School for supporting my participation at the 5<sup>th</sup> Central European Conference in Regional Sciences in Kosice. I would also like to thank the Doctoral School for making possible to conduct my research. I also want to thank to the Cultural Creative Industry and the Chamber of Commerce and Industry of Pécs-Baranya for their collaboration and to the experts for making time to my request.

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