Revisiting the Creative and Cultural Industries in Türkiye

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ABSTRACT

This study aims to investigate the developing framework of creative and cultural industries (CCI), focusing on Türkiye from 2008 to 2022 by adopting the widely accepted DCMS classification and introducing a Türkiye-specific classification to provide insights on the dynamics of creative and cultural industries over the last 5-10 years. The study differs by covering a broad period and adopting a Türkiye-specific classification, applying a commonly held approach into the industry's dynamics. In this way, it also aims to provide a comparison with the results in the international literature. The methodology involves a descriptive analysis of employment and workplace data within CCIs, employing location quotient (LQ) for provincial specializations and clusters. According to the results, the CCI employment (% of total employment) is 3.66 % in 2022 and close to the EU level. Also, the growth rate of CCI employment is much higher than total employment for the same year. On the other hand, the results of the LQ analysis re-emphasize the creative hub characteristics of Istanbul and Ankara, while Kocaeli has also specialized in CCI as of 2018. Izmir still maintains its potential specialization characteristic. Finally, the share of CCI employment by occupation (%) shows the impact of digitalization and innovation on non-traditional CCI sectors.

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Türkiye'de Yaratıcı ve Kültürel Endüstrilerin Yeniden Değerlendirilmesi

ÖZ

Bu çalışma, yaygın olarak kabul gören DCMS sınıflandırmasını benimseyerek 2008'den 2022'ye kadar Türkiye ekonomisinde yaratıcı ve kültürel endüstrilerin (YKE) değişen ve gelişen yapısını incelemeyi amaçlamaktadır. Aynı zamanda yaratıcı ve kültürel endüstrilerin son yıllardaki dinamikleri hakkında içgörü sağlamak için Türkiye'ye özgü bir sınıflandırma sunmaktadır. Çalışma, geniş bir dönemi kapsaması ve Türkiye'ye özgü bir sınıflandırmayı benimsemesi ile farklılaşmakta ve sektörün dinamiklerine ilişkin yaygın bir yaklaşımı uygulamaktadır. Bu sayede, uluslararası literatürdeki sonuçlar ile karşılaştırma yapma olanağı da sunmayı amaçlamaktadır. Çalışmada kullanılan metodoloji, illerinin uzmanlaşma katsayılarını (LQ) kullanılarak, YKE'lerdaki istihdam ve işyeri verilerinin tanımlayıcı bir analizini içermektedir. Sonuçlara göre, YKE istihdamı (toplam istihdamın %'si olarak) 2022 yılında %3,66 ile AB seviyesine oldukça yakın seviyededir. Ayrıca, YKE istihdamının büyüme oranı aynı yıl için toplam istihdamdan çok daha yüksektir. Öte yandan, LQ analizinin sonuçları İstanbul ve Ankara'nın yaratıcı merkez özelliklerini yeniden vurgularken, Kocaeli'nin 2018 itibarıyla YKE alanında uzmanlaştığı görülmektedir. İzmir ise potansiyel uzmanlaşma özelliğini korumaktadır. Son olarak, mesleklere göre YKE istihdamının payı, dijitalleşme ve inovasyonun geleneksel olmayan YKE sektörleri üzerindeki etkisini göstermektedir.

Anahtar Kelimeler
Yaratıcı ve Kültürel Endüstriler, Yaratıcı Ekonomi, Kalkınma, LQ Analizi

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1. Introduction

Cultural economies, including artistic, creative, and touristic elements, have been dominated by the concept of creative and cultural industries (CCI) with the rapid integration of technology and digitalization. This transformation encompasses the interaction between culture, economy, and technology. Moreover, it is examined by incorporating conventional theories and some distinctive characteristics. The main elements of the cultural and creative economy and sub-industries have been seen as the drivers of economic growth and development for a long time. Initially, the studies investigated the economic impacts and characteristics of cultural goods and services. After that, creativity and technology become the subject of both industrial and macroeconomic studies (Towse& Hernandez, 2020). According to Barrowclough and Kozul-Wright (2008), on the one hand, creative industries are the voice of creators and have a new insight into traditional public goods based on consumer choice. These goods benefit every citizen and contribute to regional, territorial, and global development. On the other hand, CCI is linked to a wider economy, including economic growth, employment, education, urbanization, and other industries (Marco-Serrano et al., 2014; Innocenti & Lazzeretti, 2019).

Boix-Domanech and Soler-Marco (2017) summarize growth impact as under the center of spillover effects. Because the CCI is growing faster than other industries, increasing

investment and technical efficiency boost the supply side of the economy and, consequently, economic growth. Also, increasing income and new products trigger the demand side, which has a multiplier effect on economic growth. A limited number of studies empirically investigate the CCI-economic growth nexus (e.g., Marco-Serrano et al., 2014; Innocenti & Lazzeretti, 2019; Florea et al., 2022). Nonetheless, more studies address its relevance to regional or urban development (e.g., Piergiovanni et al., 2012; Lee & Lim, 2014; Burlina et al., 2023). According to Lee & Lim (2014), regional development and growth mechanisms exist due to sectoral and spillover effects. Because the CCI has grown more rapidly than other industries in the last two decades. Also, integrating CCI into other industries leads to productivity, wage, and employment increases for the whole region in favor of externalities and spillovers. Moreover, Piergiovanni (2022) stresses that the shift or change in the sectoral composition from traditional to creative industries can provide more benefits than conventional agglomeration economies such as manufacturing, mining, and energy sectors.

Since the Creative Nation policies were first reflected by the Australian Government in 1994, creative and cultural industries have been frequently included in the policy sets of countries today with the acceleration of technological developments. According to Radbourne (1997), the most striking fact this report emphasizes is that cultural policy is now influenced by demand rather than supply and that areas such as broadcasting technologies, marketing, sponsorship, and exports require increased resources and support. Following this development, the UK Department of Digital, Culture, Media, and Sport (DCMS) developed the seminal creative and cultural industries classification in 1997. According to DCMS[1]Creative and cultural industries are defined as "those industries which 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."

After the report prepared by the UK (DCMS) using the Dynamic Mapping method, many approaches have emerged in terms of cultural industries, creative industries, creative and cultural industries, or creative economy since the end of the 1990s. For example, UNCTAD (2008) has defined each concept in this field separately. All these definitions have "creativity" and "culture" in common. In sum, according to these definitions, any economic, scientific, or cultural creativity is nowadays linked to technological creativity. UNCTAD's (2008) definition

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[1] While the department's first name was "Culture, Media, and Sports," the phrase "Digital" was added in 2017.

of creative industries is very similar to the Schumpeterian Trilogy[2] It emphasizes creating, producing, and distributing goods and services using creativity and intellectual capital as inputs.

It is possible to advert some basic factors that accelerate the emergence of this field, which attracts increasing attention and is given importance by researchers and policymakers. According to Potts (2009: 138-139), industrial and technological transformations in the composition of the modern economy are obvious. This transformation has led to the emergence of concepts such as "post-industrial society," "knowledge-based economy," "creative class," and "creative industries" and related policies in the literature. Second, these new approaches and policies follow a Schumpeterian or evolutionary approach, which is different from the existing culture, arts, and media industries, creating a new classification, innovation policy, and understanding of the industry. Lastly, it is an industry that, unlike other industries, produces goods and services that constitute the input for innovation.

In recent years, the field's growing importance can be traced to the European Union's "Creative Europe" program. The European Commission states that the 14 key industries within the cultural and creative ecosystem, comprising over 8 million employees and 1.2 million companies, the majority of which are SMEs, are also essential for the European Single Market. Moreover, the EU Commission expects relevant industries to contribute to sustainable development goals such as decarbonization and digitalization (European Commission, 2020).

This study aims to analyze the current state of the creative and cultural industries, which have become increasingly important in recent years. In this context, employment and workplace data in the creative and cultural industries are analyzed with a descriptive perspective and by employing location quotient for the specializations and clusters. This study differs from other studies in that it analyzes the sub-sectors in the NACE classification used in Türkiye by adapting the DCMS (2017) classification, commonly accepted in the literature, by presenting a novel classification for Türkiye. Moreover, unlike the existing literature for Türkiye, this study covers a broad period from 2008 to 2022. To include the last 5-10 years is particularly important to gain insights into how digitalization and technology have changed the dynamics of the creative and cultural industries.

The next section of the study presents a broad literature review that includes both policy and data analyses of creative and cultural industries. Chapter 3 consists of three sub-parts: classifications of creative and cultural industries, data, and methodology. In Chapter 4, I present

and discuss the descriptive and clustering analysis results by considering dynamics and relevant studies. The last part presents the conclusion, which comprises policy implications.

2. Literature Review

The literature began with DCMS's first attempt to define and apply a dynamic mapping method in 1997 for the UK. This study and Pratt (1997), Hall (2000), and Lazzeretti et al. (2008) are the benchmark studies for the CCI (Seçilmiş, 2015). Although many relevant departments in the countries have started to analyze the CCI, academic literature is still limited. Also, a limited number of studies have examined the creative and cultural industries empirically, especially in Türkiye.

This limit can also be seen in studies on Türkiye. To the best of our knowledge, the first empirical study on Türkiye was conducted by Lazzeretti et al. (2014). They employ the DCMS (2001) classification to show creative clusters by location quotient (LQ) between 2008-2011. The data sources are TURKSTAT Culture Statistics, TURKSTAT Annual Industry and Services Statistics, Turkish Revenue Administration, and Social Security Institution. The results show that the growth of CCI in Türkiye is 38 %, which is higher than the world average (25 %). The sub-sectors with the highest growth are publishing and software programming (465 % and 487 % respectively). Advertising is the only sub-sector which is downsizing (-8 %). However, according to LQ analysis, only two provinces, Istanbul (1.71) and Ankara (1.53), experience creative industry clusters. The prominent sectors for Istanbul are as follows: Film, video and music, radio and TV, publishing, advertising, and entertainment and arts. Ankara stands out in the architecture, software, and programming sub-sectors. Also, Seçilmiş (2015) analyzes clusters in CCI from an economic geography perspective for 81 provinces in Türkiye for 2011 and reports similar results. Seçilmiş (2015) emphasizes that 86 % of all provinces have LQ scores in the range of 0.7-0.3 and that there is a sectoral concentration in advertising and marketing-based sectors rather than information and communication-based sectors to prevent the expected impact of creative industries. Also, only 2 % of total employment was in the creative industries in 2011.

Again, in 2011, Lazzeretti et al. (2016) investigated and compared the CCI in Italy, Spain, and Türkiye. The individual results are the same as those of Lazzeretti et al. (2014) and Seçilmiş (2015), but the differences between Italy, Spain, and Türkiye are prominent. In Milan and Madrid, the distribution of clusters is more homogeneous, and software and programming sub-sectors have the highest share in the CCI. However, Türkiye has a more heterogeneous distribution in clusters and a low share in software and programming, which are more influential

due to knowledge spillovers in the wider economy. Yardımcı (2016) evaluates the CCI in Türkiye for the period between 2009-2013. The study shows that Türkiye has increased performance from 2009 to 2013 regarding CCI employment, new firms, value-added, and growth. However, the wage increase for this sector stays under the Türkiye average. The best-performing activity group in Türkiye is information technologies, software, and computer services, while the lowest performer is design and fashion design.

The most recent and comprehensive study on the CCI in Türkiye is the IZKA Report (2021). The report investigates the many topics for the CCI, such as trade, comparative advantages, spillovers, relevant agents, and Izmir, and it is analyzed specifically. Unlike the previous studies, IZKA (2021) employs the NUTS-2 classification, so the results are regionally (26 sub-regions). The analysis shows that the creative economy had specialization in regions TR10 (Istanbul), TR51 (Ankara), and TR61 (Antalya, Isparta, Burdur) in 2015. Compared to OECD countries, the ratio of employment in the CCI to total employment in Türkiye is relatively low (1.7 %). In comparison, the value added to computer programming occupation (52 %) is higher than in many OECD countries in 2017.

In addition, some studies on Türkiye generally emphasize the importance of the CCI and evaluate Türkiye's current situation. Demir (2014) stresses the potential effects of integration of the CCI into higher education. Increasing value-added and paying attention to the CCI means more involvement in the education system due to market demand. Besides, the studies on the CCI in Türkiye should be evaluated from a multidisciplinary academic point of view (Aslan, 2017). More specifically, some studies focus on metropolitan cities like Istanbul (e.g., Çetindamar & Günsel, 2012; Hocaoğlu, 2015; Kerimoğlu & Güven-Güney, 2018), Ankara (e.g., Kaymas, 2019), Izmir (e.g., IZKA (2021)). According to Hocaoğlu (2015), metropolitans have some advantages for creative activities because, first, multinationalism and dynamism revive the creative class and sector. Second, these cities enable various creative activities that provide job creation. On the other hand, the CCI is seen as more vulnerable than traditional sectors. For example, the COVID-19 pandemic damaged some creative sectors; however, some started to rise during this period. Özarslan (2021) emphasizes that the culture and art sector was affected negatively, but information and communication technologies took center stage.

Currently, Demir (2022) presents a comprehensive discussion of Türkiye's creative economy policies. Two critical points draw attention: i) establishment of the Department of Cultural Services & Creative Industries under the Ministry of Commerce in 2021. ii) Türkiye

has a good performance on the UNCTAD (2015) country report[3]Türkiye is ranked 12th globally and is one of the first five developing countries in creative commodity exports.

The creative and cultural industries have many problems and consequences that span across society and the economy. For example, Akdede (2011) defines theaters as a merit good and states that public theaters are public goods that create positive externalities. In this case, financial support for public or private theaters is critical in two ways. The first is to provide social benefit and even maximize this benefit; the other is to ensure the spread and sustainability of cultural life in the society.

Considering all these economic and social contributions and the weaknesses of the sector, the importance of analyzing the current state of this industry can be seen. In this way, it is also critical to discuss the strengths and weaknesses of many sub-sectors within the industry to guide its role in international competition and its increasing growth in recent years.

3.   Classifications of Creative and Cultural Industries, Data and Methodology

3.1. Classifications of Creative and Cultural Industries

The first attempt at the economic contribution and systematic classification of creative and cultural industries was the Creative Industries Mapping Document in 1998 by the UK DCMS. In 2001, DCMS published a more overarching report that stressed the classification and importance of whole economies. According to DCMS (2001), the original definition of creative industries is "*those industries which 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.*" So, this approach also underlies the classification of CCI. At the same time, the sub-sectors were processed as 13 sub-sectors in the beginning (in 1998), the most recent[4] number of sub-sectors is 9. The following table presents the classifications of DCMS by two years and corresponding NACE Rev. 2 codes in Türkiye.

Table 1

DCMS Classification of Creative and Cultural Industries (1998, 2017).

DCMS (1998)	DCMS (2017)	NACE Rev.2 Codes related to DCMS (2017) in Türkiye

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[3] "Creative economy outlook and country profiles: Trends in international trade in creative industries."

[4]The last update was on 26 January 2017 by DCMS. https://www.gov.uk/government/collections/creative-industries-economic-estimates

Advertising	Advertising and Marketing	70.21 Public relations and communication activities 73 Advertising and Market Research
Architecture	Architecture	71 Architectural and engineering activities; technical testing and analysis
Art & Antiques Market	Crafts	
Crafts	Product design, graphic design, and fashion design	74.10 Specialised design activities 74.90 Other professional, scientific, and technical activities n.e.c
Design	Film, TV, video, radio, and photography	59 Motion picture, video, and television programme production, sound recording, and music publishing activities 60 Programming and broadcasting activities 74.20 Photographic activities
Designer Fashion	IT, software, video games, and computer services	58.20 Software publishing 62 Computer programming, consultancy, and related activities 63 Information service activities
Film & Video	Publishing and translation	58.10 Publishing of books, periodicals, and other publishing activities 74.30 Translation and interpretation activities
Interactive Leisure Software	Museums, galleries, and libraries	91 Libraries, archives, museums, and other cultural activities
Music	Music, performing arts, visual arts, and cultural education	90 Creative, arts, and entertainment activities
Performing Arts		
Publishing		
Software & Computer		
Television & Radio		

Source. DCMS (1998; 2017).

Another approach emerged by UNCTAD, the "Creative Economy Programme," in 2004. UNCTAD defines CCIs as the most dynamic sector today, and they can be broken down into three categories: artistic creativity, scientific creativity, and economic creativity (UNCTAD, 2008). Also, UNCTAD (2008) stressed the differences between creative industries and creative economy. In a basic sense, while the creative industries are the industries that involve creativity in every sense, the creative economy is all economic activities and their final response, which evolve with creativity. So, the creative industries are at the heart of the creative economy. Lastly, according to UNCTAD (2022), in a broad sense, creative industries are as follows: design and creative services, cultural and national heritage, performance and celebration, visual arts and crafts, audio-visual and interactive media, and books and press.

The World Intellectual Property Organization (WIPO) approach emphasizes the strong ties between creative industries and intellectual property. According to WIPO (2017), the creative industries encompass a varied range of activities, each of them comprising intellectual property rights at various levels. The following list gives the creative industries classification by WIPO (2017): press and literature; music, theatrical productions, operas; motion picture and video; radio and TV; photography; software and databases; visual and graphic arts; advertising agencies and services; copyright collective management organizations.

3.2. Data and Methodology

The creative and cultural industries are classified in literature by dynamic mapping methods (e.g., DCMS, NESTA). This method comprises three steps:

Step 1. Defining creative (and cultural) occupations

Step 2. Rating the standard occupations using the 'creative grid': Calculating the proportion of employees in creative (and cultural) occupations for each industry (creative intensity)

Step 3. Deriving rigorous intensity measures: Defining industries with a creative intensity above a threshold value as "creative industries" (Bakhshi et al., 2013; IZKA, 2021).

According to Bakhshi et al. (2015), dynamic mapping is a systematic method that does not overreact to slight fluctuations in data. Still, it is able to adjust to structural economic shifts while generating the most creative industries. The most commonly used classification in the relevant literature is the DCMS. The OECD utilizes the DCMS classification in the most recent report entitled "The Culture Fix Creative People, Places and Industries (2022)". However, the OECD emphasizes that countries' creative industry classifications may have diversity in their

choice of sub-sectors or the inconsistency of NACE rev. 2 and 4. In this context, for example, the UK takes only fashion design while Australia employs broader sub-sectors: clothing and footwear manufacturing and wholesale and retail trade. As another example, some country statistics present libraries in the literature group, some included in museums (OECD, 2022). So, this study also has similar limitations because of data and NACE classification restrictions. I use the DCMS classification and present the corresponding NACE Rev. 2 codes related to the DCMS (2017) classification in Table 1.

This study has two data sources about the creative and cultural industries in Türkiye. The first one is Annual Industry and Service Statistics obtained from TURKSTAT. It consists of sectoral employment and the number of workplaces data according to NACE Rev. 2. at the four-digit level. However, this data does not provide any information on a regional or provincial scale. Therefore, the Annual Industry and Service Statistics from 2009 to 2022 are used for country-level calculations. The second data source is the Statistical Yearbooks of the Republic of Türkiye Social Security Institution (RTSSI). This data includes a vast number of series about the production, insurance employees, and workplaces at the digit level of Nace Rev. 2. Moreover, it consists of the number of employees and the number of workplace data for each sector at the provincial level. For this reason, I used this dataset to calculate the spatial concentration of creative and cultural industries from 2008 to 2022.

This study first focuses on the dynamics of CCI in Türkiye between 2008 and 2022 by the Republic of Türkiye Social Security Institution (RTSSI) employees and workplace data. The data set provides detailed information within the activity group and province level. I employed the RTSSI data to calculate the location quotient (LQ) index. The LQ index is the primary tool used in the economic geography literature to measure the geographic concentration of economic activity. It is used to identify regional clusters of firms or employment. In the economic geography literature, when the LQ index, which is calculated by dividing the ratio of employment in a particular sector in a region by the total employment of the region, by the share of employment of the relevant sector in the country, takes a value greater than one, it indicates that the relevant sector is concentrated in that region. Location Quotient measures the agglomeration or clusters of sectors in each province or region with this formulae:

$$LQ_{it} = \frac{E_{ijt}/\sum_{j=1}^{n} E_{ijt}}{\sum_{i=1}^{k} E_{ijt}/\sum_{j=1}^{n}\sum_{i=1}^{k} E_{ijt}} \tag{1}$$

In the formulae (1), LQ_{it} represents the location quotient index of each province at time t. Index of i represents the industries, while j and t represent the provinces and dates,

respectively. E_{ijt} is the number of the employment of i. industry in j province at time t. Hence, $\sum_{j=1}^{n} E_{ijt}$ calculates the total employment of j province at i. industry. $\sum_{i=1}^{k} E_{ijt}$ calculates the total employment of j province, when $\sum_{j=1}^{n} \sum_{i=1}^{k} E_{ijt}$ measures the total employment of country.

4. The Creative and Cultural Industries in Türkiye: Dynamics and Clustering Analysis

Türkiye experienced a significant increase in the number of CCI employees, which was 400,757 between 2009 and 2022. Of course, in this period, there were extensive advancements, such as technological development, directly related to the CCI. While the number of employees was 281,604 in 2009, this number increased to 682,361 in 2022. Also, the growth in the number of workplaces shows a similar pattern. It increased from 62,964 to 151,346 between 2009 and 2022. Both indicators show a sharp increase in the last two years.

Figure 1. Number of Employees in the CCI in Türkiye

Source. Author's own calculations from TURSKTAT's Annual Industry and Service Statistics

The dynamics in CCIs are vital due to the high sensitivity of these sectors, such as in the COVID-19 pandemic. Eurostat (2022) reports cultural employment decreased by 3 % in 2020 compared to the pandemic year of start in 19 EU member states. Similarly, the UK CCIs suffered from the pandemic, but there has been a recovery in recent years. In 2022, the annual growth of cultural employment is 4.5 % in the EU, and the annual growth of CCI employment in 2022 is relatively small at 2.5 %, but between 2019-2022, the change is 14.1 %. This implies that after the pandemic, there is a strong growth trend in this sector. However, regarding the media and communication sectors within this industry, Kızılca & Karagöz Kızılca (2018) state

that precarious or freelance work and insufficient employment opportunities in these sectors are prominent problems that need to be considered.

It is shown that the employment increased slightly (1.33 %) from 2019 to 2020. This situation is the opposite of the EU (-3 %) and the UK (approximately -10 %, -15 %)[5]. When we investigate the details of this contrast, it can be seen that the employment of sub-sectors such as architecture, IT software, radio, and TV, which have high employment within the CCI, increased sharply compared to the previous year. On the other hand, although employment in the music performing and museum sub-sectors decreased significantly, the employment shares of these sectors are quite low. Therefore, the pandemic's impact on Turkey was limited to the total CCI.

When we look at the sources of the decline in 2019, it is possible to see the results of the sharp decline in the employment of the sub-sectors with a high share of employment in the CCI mentioned earlier. In the Turkish economy, the employment rate decreased in 2019 and 2020. In 2020, it can be thought that the policies made to surpass the impact of the pandemic, such as the ban on layoffs and short-time working allowance (Bayrakçı, 2021), may have prevented the decline in CCI employment.

On the other hand, while the pandemic negatively affected almost all sectors and the economy in global, the sectors that suffered the most from this negativity were tourism, hospitality, and cultural sectors (Lyons, 2023). To recover from this negativity, The UK Creative Industry Council has submitted a recovery plan that includes funding and policy.[6] Also, the EU stresses that returning to the "old normal" is not enough because these industries are vulnerable and need a more systematic transition considering sustainable strategies (De Voldere et al., 2021).

We can follow two reports in Türkiye addressing the effects of the pandemic and recovery policies for cultural industries, IKSV (2020) and Ministry of Culture and Tourism Directorate General for Copyright (2020). IKSV (2020) explained the support provided in Türkiye after summarizing the measures taken by countries providing public support during the pandemic. Türkiye's support includes deferrals for payments such as principal and proceeds, SSI premiums, and VAT. Although some measures were taken in this period, theater occupations were highly affected by the pandemic. It can be said that the most substantial and

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[5] Please see https://www.thecreativeindustries.co.uk/download-hub/cic-covid-19-transition-and-recovery-plan

most concrete support is for those working in the field of archaeology and art history. The expansion of excavation activities to 12 months and the increase in employment opportunities also encouraged the acceleration of studies in the cultural heritage field during the pandemic. In addition to previous support, the Ministry of Culture and Tourism (2020) emphasizes digital apps in culture and arts during the pandemic. Also, 44 million TL support was provided to 209 projects in 2020. However, as important as state theaters are for development, private theaters are just as important. For this reason, the insufficient support of private theaters, which were in a particularly lurch during the pandemic, was a problem that required solutions in this period (Akdede, 2021).

Table 2

The CCI Employment (% of Total Employment) and The CCI Workplaces (% of Total Workplaces)

Year	The CCI employment (% of total employment)	The CCI employment growth (%)	The CCI workplaces (% of total workplaces)	The CCI workplaces growth (%)
2008		-		-
2009	2.79	-	2.39	-
2010	2.82	9.51	2.54	7.92
2011	2.87	12.26	2.70	8.78
2012	2.94	11.44	2.88	8.93
2013	3.07	10.42	3.11	9.87
2014	3.16	8.50	3.28	6.99
2015	3.25	7.18	3.39	5.22
2016	3.37	4.62	3.51	5.00
2017	3.45	6.51	3.56	5.62
2018	3.43	0.51	3.66	4.70
2019	3.42	-3.49	3.69	3.07
2020	3.40	1.33	3.76	4.16
2021	3.57	15.06	3.83	10.38
2022	3.66	9.31	4.00	10.44

Source. Author's own calculations from TURSKTAT's Annual Industry and Service Statistics.

As in the rest of the world, Türkiye shows recovery from the pandemic's effects. After this period, the CCI employment (% of total employment) achieves the pre-pandemic rate and increases to 3.66 %. The CCI employment growth rate is 9.31 % in 2022 compared to the previous year. Thanks to the growth rate of CCI, employment was nearly double the EU growth rate, which is 4.5 %; Türkiye's percentage of CCI of total employment reached a similar level to the EU, which is 3.8 % in 2022. During 2008-2022, the trend did not change much, but after 2013, the proportion of employees working at CCI caught up with the EU average. In addition,

the workplace statistics show a similar trend with employment. However, it can be said that the growth rate of CCI workplaces follows a fluctuating course and achieves a significant increase after 2021.

Table 3

The share (%) of CCI Employment by Occupations in 5 Years Periods

NACE Rev.2 Codes	Occupations (DCMS (2017))	Employment by Occupations (% of total CCI employment)			
		2009	2013	2018	2022
70.21 73	Advertising and Marketing	22.07	18.87	14.58	12.28
71	Architecture	35.13	38.00	39.29	36.01
74.10 74.90	Product design, graphic design, and fashion design	2.68	5.25	8.76	8.16
59 60 74.20	Film, TV, video, radio, and photography	10.08	10.21	8.58	8.12
58.20 62 63	IT, software, video games, and computer services	20.51	18.40	21.12	29.10
58.10 74.30	Publishing and translation	7.33	6.42	5.06	3.95
91	Museums, galleries, and libraries	0.18	0.30	0.40	0.27
90	Music, performing arts, visual arts, and cultural education	2.02	2.55	2.25	2.10

Source. Author's own calculations from TURSKTAT's Annual Industry and Service Statistics.

Table 3 shows the shares of occupational employment (% total CCI employment). While the share of employment in some activities has been steadily increasing, some are decreasing. For example, while architectural and advertising activities had the highest employment in 2008, both activities declined after 2018. It can be said that the contribution of traditional sub-sectors, such as advertising and publishing, falls compared to non-traditional sub-sectors, such as information technologies and related technologies. This result is in line with Lazzeretti et al. (2014), except for advertising activities. Because Lazzeretti et al. (2014) report that advertising activities had the highest share in 2011, our results show that it was 21.15 % in 2011. However, information and related technologies jumped from 20.51 to 29.10 between 2009-2022, and in 2022, architecture has the most significant share in the CCI.

I employ the Statistical Yearbooks of the Republic of Türkiye Social Security Institution (RTSSI) for the LQ analysis because only this data set gives the provincial details. Therefore, the results of the LQ analysis are based on the relevant occupations in the NACE Rev.2 classification given by RTSSI instead of the DCMS (2017) classification.
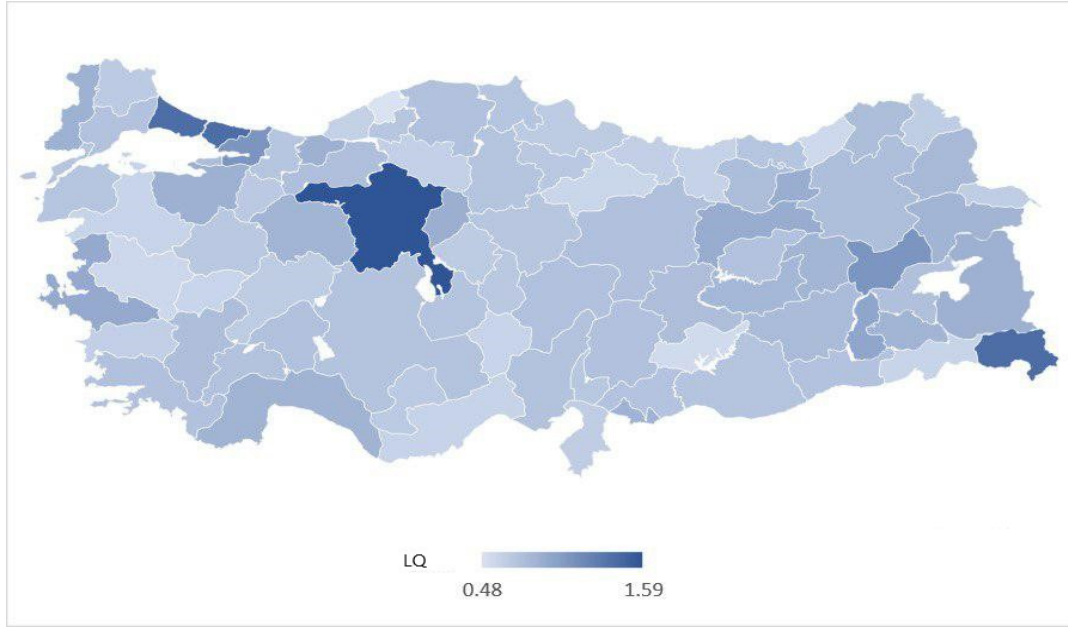

Figure 2. Spatial Concentration (Number of Employees) of Cultural and Creative Industries (2022)

Source. Author's own calculations from Republic of Türkiye Social Security Institution data.

Figure 2 shows the spatial concentration of CCI in Türkiye in 2022 using the LQ index. On the one hand, LQ results give the concentrations; on the other hand, we can also interpret the specialization provinces. In 2022, the LQ values of Ankara (1.59), Istanbul (1.40), Hakkari (1.40), Kocaeli (1.08), and Muş (1.08) exceed 1. However, the total employment of Hakkari and Muş cannot comprise the 1 % share of total employment in Türkiye. Therefore, we cannot consider the specialization of these provinces in creative industries.[7] In sum, Ankara, Istanbul, and Kocaeli are the specialized provinces in the CCI. Our results are mostly in line with Lazzeretti et al. (2014) and Seçilmiş (2015), but in some cases, we put forward some differences. First, previous literature's analysis of the latest end to 2011 data. This study

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[7] As recommended by the DCMS, the information provided by the dataset in provinces with total employment below the threshold value may be biased or may not produce reliable results. Therefore, the evaluation of these results should be avoided. This study also follows Lazzeretti et al. (2009) and Lazzeretti et al. (2014) for these limitations in the calculation methodology and recommendations. Therefore, no assessment is made for Hakkari and Muş despite their LQ values above 1%.

analyzed 2022 data, which is the most recent date, and employed the DCMS (2017) classification.

For this reason, the LQ analysis shows that Kocaeli has specialized in CCI, in addition to Ankara and Istanbul, since 2018. Previous studies find the LQ values of Istanbul and Ankara to be 1.71 and 1.53, respectively. Our results also differ in values. Both provinces' LQ values have increased over the years, but Ankara's LQ value was higher than Istanbul's between 2008 and 2022.

In recent years, Kocaeli has become one of the creative cities due to the city's strong and current high potential in R&D and industry. Especially with Industry 4.0, the close relationship between creativity, innovation, and technology has increased concentrations in industrial cities like Kocaeli. Esen & Atay (2020) report that Kocaeli and Ankara share the first place in the creativity index, which consists of technology, talent, and tolerance indicators. They also emphasize that the reason for this is closely related to high technology, innovation, R&D activities, and migration.

Table 4

Top 4 Provinces with High LQ (Number of Employees) in the CCI in Türkiye

	2008	2013	2018	2022
Ankara	1.48	1.52	1.59	1.59
Istanbul	1.23	1.32	1.33	1.40
Kocaeli	0.90	0.99	1.02	1.08
Izmir	0.80	0.90	0.90	0.92

Source. Author's own calculations from Republic of Türkiye Social Security Institution data.

As IZKA (2021) mentioned, some provinces may have a high share in total employment and an LQ value close to 1 %, although their concentration value does not exceed 1. Considering these two indicators together, we see that Izmir is of this nature. The LQ value of Izmir is 0.92, but she has been stable at around 0.90 over this period. Izmir is the province closest to showing a higher concentration in the CCI. Given its potential and high employment share, the proposed policies for CCIs in Izmir will contribute to realizing this potential. The fact that its position has not changed much over the years, but the concentration in recent years has broken this constancy may indicate that the transformation process has begun.

According to Rocha (2004) and Rocha & Sternberg (2005), clustering has three dimensions: geographical proximations of the sources of concentration, such as social capital, externalities, etc., firm networks, interfirm networks, and inter-organizational or institutional networks.
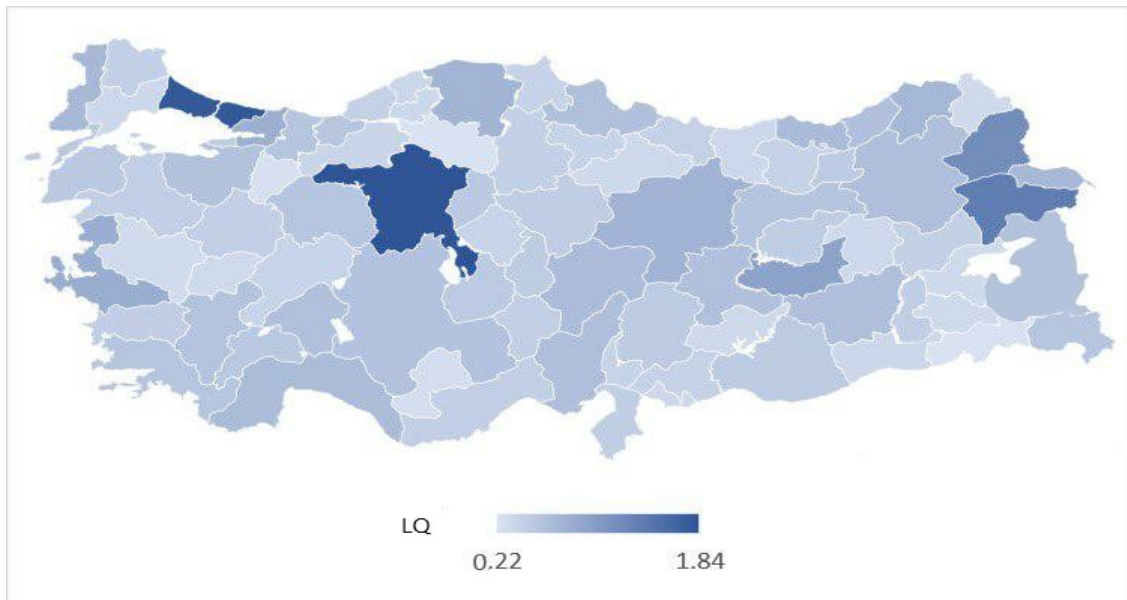

Figure 3. Spatial Concentration (Number of workplaces) of the CCI (2022)

Source. Author's own calculations from Republic of Türkiye Social Security Institution data.

When we consider that Istanbul and Ankara have similar inter-organizational or institutional networks, such as relationships with governmental and non-governmental organizations, it can be said that they both can be called "creative clusters." According to the LQ values of workplaces (see Figure 3 and Table 5), only Istanbul and Ankara specialize in these activities besides the spatial concentration of employees.

Table 5

Top 2 Provinces with High LQ (Number of Workplaces) in the CCI in Türkiye

	2008	**2013**	**2018**	**2022**
Istanbul	1.42	1.52	1.61	1.78
Ankara	1.93	1.67	1.82	1.84

Source. Author's own calculations from Republic of Türkiye Social Security Institution data.

This may indicate that the creative ecosystem in Ankara and Istanbul is rich not only in terms of employment but also in terms of creative firms. This is supported by the fact that

development agencies in Ankara and Istanbul have been focusing on creative and cultural industries, and these cities have been seen as "hubs" in this field in recent years.[8]

Table 6

The Creative and Cultural Industries in Top 4 Specialized Provinces (2022)

Occupations (NACE Rev.2)	Ankara	Istanbul	Kocaeli	Izmir
58 Publishing activities	**1.45**	**1.91**	0.47	0.57
59 Motion picture, video, and television programme production, sound recording, and music publishing activities	0.77	**2.98**	0.16	0.34
60 Programming and broadcasting activities	**1.26**	**2.69**	0.10	0.23
62 Computer programming, consultancy, and related activities	**1.86**	**2.22**	**1.16**	0.93
63 Information service activities	**1.81**	**2.11**	0.39	0.56
71 Architecture	**2.35**	**1.03**	0.84	0.82
73 Advertising and Marketing	**1.19**	**2.41**	0.30	0.82
74 Other professional, scientific, and technical activities	**1.30**	**1.58**	0.98	0.94
90 Creative, arts, and entertainment activities	**2.33**	**1.84**	0.09	**1.31**
91 Museums, galleries, and libraries	**1.56**	**1.06**	**1.49**	0.68

Source. Author's own calculations from Republic of Türkiye Social Security Institution data.

Table 6 shows the CCIs in the top 4 specialized provinces according to NACE Rev.2 occupations. While Istanbul specialized in all sub-sectors, Izmir specialized in only creative, arts, and entertainment activities. Ankara's LQ values also exceed 1 in all occupations except motion picture, video, TV programme production… (59), strikingly, Istanbul is the leader among all occupations and provinces in this area. While Ankara leads in architecture, it is also ahead of Istanbul in creative, arts, and entertainment activities and museums, galleries, and libraries. The results for Izmir are similar to IZKA (2021) findings. Although Izmir is not among the provinces that specialize in creative and cultural industries, it is one with a high potential for specialization. In addition, when we look at the sub-sectors, the results show a specialization in creative, arts, and entertainment activities, including design activities. In this

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[8] For more details, please see; https://www.atonet.org.tr/IcerikDetay/23937_ato--yaratici-ekonomi-icin-harekete-gecti
https://Istanbulyaraticiendustrilermerkezi.com/

line, IZKA (2021) also emphasizes the need to support design and advertising activities in Izmir.

Unlike the results of the previous studies in creative and cultural industries, it is concluded that Kocaeli specializes in some occupations like in the recent studies. Kocaeli's LQ value exceeds 1 in computer programming (62) and museums, galleries, and libraries (91) sub-sectors. This result is in line with Esen & Atay (2020), which examines creative cities in Türkiye with a different indicator. Esen & Atay (2020) stress that Kocaeli ranks among the top five cities in Türkiye regarding the creativity index, which consists of talent, technology, and tolerance indices. Moreover, Kocaeli, rich in cultural heritage, is at the forefront of activities in this field. According to IZKA's (2021) results on the specialization and dominance analysis, Kocaeli exceeded the threshold in size and specialization in museums and archives in 2015. Regarding Kocaeli's cultural and industrial heritage, the SEKA Paper Museum and Kocaeli Science Center are particularly noteworthy (Tunçelli et al., 2020). This center also has an essential role in Kocaeli and Türkiye in terms of creative and cultural industries as it brings together cultural heritage and creative industries.

5. Conclusion

The cultural and creative industries are critical in terms of culture, cultural heritage, economy, trade, technology, etc. Since it is associated with many sub-sectors or occupations, the definition and scope of these industries are primary. In this context, firstly, this study aims to construct a novel classification adapted by DCMS (2017) and analyze it for the Turkish economy using NACE classifications. After the classification presentation, which differs from other studies on Türkiye with this approach, the descriptive and LQ analyses are conducted using data on employment and workplaces for the period 2018-2022. In this way, the current situation in terms of employment and initiatives in the creative and cultural industries in Türkiye is presented. LQ analyses have also been used to reveal provincial clusters and specializations.

According to the results, Türkiye has performed well in terms of employment in the creative and cultural industries between 2008 and 2022. The average growth rate in the number of employees over this period was 6.5 %, also with an average growth rate of over 10 %, especially in the last two years. More specifically, while the CCI employment (% of total employment) grows by 9.31 %, the total employment growth rate is 2.3 in 2022. On the other hand, the CCI employment (% of total employment) was affected by COVID-19 but increased immediately in the post-COVID period, reaching 3.66 %, so close to the EU average of 3.8 %. This can show that CCI industries have not been left out of the new economy ecosystem

centered on technology, creativity, and culture, even during this period of stagnation in the Turkish economy.

The results of this study, which uses a novel classification and period for Türkiye compared to other studies, also differ from other studies in previous years, which limited the provinces specializing in CCI to Ankara and Istanbul. According to the results of LQ analyses based on the number of employees in CCI, Istanbul, Ankara, and Kocaeli have LQ values exceeding 1. Therefore, they are the provinces specializing in CCI. Moreover, while Istanbul specialized in all sub-sectors, also Ankara specialized in all occupations except motion picture, video, TV programme production, sound recording, and music publishing activities. Istanbul is the leader among all occupations and provinces in this area (motion picture, video…). Still, Ankara leads in architecture, and it is ahead of Istanbul in creative, arts, and entertainment activities, as well as museums, galleries, and libraries. In sum, Ankara and Istanbul can be seen as "creative clusters" or "creative hubs."

The presence of Kocaeli in this group is particularly noteworthy. It can be said that studies on Kocaeli's competitive structure in the fields of creativity, innovation, and technology support this conclusion. Finally, although Izmir's LQ value has been close to 1 over the years, she has not managed to be among the provinces specializing in CCI. Therefore, it is critical to attach importance to potential occupations such as creative, arts, and entertainment activities in Izmir and formulate policies in this direction.

In recent years, these creative and cultural industries have been divided into two categories: traditional and non-traditional. The new categorization is constituted mostly of technological developments. The transformations experienced due to the adaptation of technology to every stage of the economy and life have also been seen in the creative and cultural industries. This transformation can also be observed in the distribution of CCIs in Türkiye by occupation. For example, while the employment ratio of advertising and marketing to total CCI employment was 22.07 % in 2009, this ratio decreased to 12.28 % in 2022. On the other hand, the share of employees in IT, software, video games, and computer services in total CCI employment increased after 2013, reaching 29.10 % in 2022. Another non-traditional sector with a notable increase in product design, graphic design, and fashion design (from 2.68 % (in 2009) to 8.16 % (in 2022).

Creative and cultural industries, which have changed their shape and become increasingly important in recent years with the integration of technology and innovation into every stage of economic life, have become increasingly important for economies. Moreover,

technology, innovation, and cultural and social activities have become more visible to policymakers as their share in human life and economies has increased. These industries have been on the agenda of first the UK and then the European Union. Türkiye is not far from this ecosystem. This process, which started with the support of cultural industries, especially during the COVID period, has gained momentum in recent years with the increase in cultural heritage studies.

However, these industries are still concentrated in certain provinces in Türkiye. First of all, provinces' potential occupations should be considered when making regional policies. Moreover, Türkiye should also pay more attention to areas of occupations with comparative advantage in international trade for services and goods and cooperate in designing policies to increase employment and productivity. In addition, the spillover effect created by entrepreneurship in the field of innovation is undeniable. The contribution of this field, which encompasses both cultural and creative activities, to regional development is expected to be significant in future provisions. In addition, the contribution of these sectors, which increase the competitiveness of countries in terms of their trade composition, to economic growth is also important.

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