

Staying Power to Finnish Cultural Exports

**The Cultural Exportation Project of
the Ministry of Education, the Ministry for Foreign Affairs and
the Ministry of Trade and Industry**

Publications of the Ministry of Education, Finland 2005:9

Hannele Koivunen

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Abstract

Meaning-intensive production and creative economy are emerging as crucial assets in international competition. Many countries revised their cultural exportation strategies in the 1990s, adopting the creative economy sector as a key strategy in international competitiveness.

The strengths of Finnish cultural exports are our large creative capital, high-standard education in the creative fields, strong technological know-how, good domestic infrastructure in culture, well-functioning domestic market and high-quality creative production. Our cultural production is highly valued internationally, and we cannot meet the international demand for Finnish culture.

The weak points in our cultural exports are leakage points in the value chain, information, marketing, promotion, and lack of a strategy and coordination in cultural exportation. The structure of the cultural industry is not competitive. What is needed is more entrepreneurship and business know-how and the management of immaterial rights. Another weakness is the lack of capital and inadequate support for cultural exports.

The largest input is needed to raise the Finnish creative economy into an internationally competitive branch, alongside ICT and biotechnology, by creating an extensive CREAFIN cluster of creative economy and by devising a development programme for the creative economy and cultural exports for 2005–2010 in support of it. It is proposed that Finnish cultural production and exports be developed as a core area of the CREAFIN cluster.

The proposed measures concern both the promotion of cultural exports and the creation of favourable conditions for cultural exports. Especially the measures for promoting cultural exportation require urgent input.

I. With a view to promoting cultural exports:

1. To establish CREAFIN - creative economy cluster in Finland.
2. To set up President's Award for Cultural Export.
3. To develop strategic cooperation in cultural exportation.
4. To launch a programme for developing the creative economy and cultural exports 2005-2010.
5. To promote cultural entrepreneurship and capital creation in the cultural economy.
6. To launch a programme for professional and expert exchanges in cultural exports 2006-2010.
7. To create a network for disseminating information about cultural exports.

II. Prerequisites for cultural production:

1. Education and research: multiprofessional knowledge and know-how, a strong knowledge base
2. Product development: a holistic view, an innovation chain, concept development, cross-branding
3. Preconditions for creativity: artists' working conditions, an infrastructure, the domestic market
4. Protection of intellectual property: copyright, protection of designs, patents, brands

The measures and input proposed in this report and in the cultural exportation development programme 2005-2010 make for concrete cultural, ethical, social, employment and economic results. As an attractive area of creative economy, Finland will draw top doers, whose input will generate creative capital - a positive circle or vortex of creativity.

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Preface

Cultural production, cultural exports, the experience industry, the creative economy, the creative community... These are similar concepts which differ in focus and comprehensiveness, but all of them have come to the fore in public debate this spring in an entirely new way.

Debate is coloured by the realization that this is, in fact, an issue of profound importance, and one of considerable urgency at that; it is in this sector somewhere that we are likely to find Finland's next success story and the keys to Finland's future competitiveness and survival.

Three weighty statements were made on this subject in spring 2004, and the gist of all three was much the same; there was Pekka Himanen's report to the Parliamentary Committee for the Future, concerning the challenges to the Finnish information society over the coming years; there was Sitra's report Towards a Creative Economy - Cultural Know-How as a Resource for the Future; and there was the present report on the present state of and future opportunities for Finland's cultural exports.

For the present report, Hannele Koivunen collected a wide range of comprehensive material on the present state of Finland's cultural exports. Only a small part of this material could be fitted into this report, which naturally focuses mainly on proposals for action that should be taken. The working group appointed to support the work on the report tried — in keeping with its name — to support and help her both in collecting material and in shaping conclusions and proposals for action. Group meetings were characterized by intense discussions which reflected the differing backgrounds of those present and their different views on the concept of cultural exports, the prospects of such a concept and how it ought to be supported. For some, the concept as such had an intrinsic value, to some it was one public relations tool among others and a way of raising the country's profile, while to others it was just one form of exports among many and, like the other forms, it should bring money into the country.

I was left with the impression that we achieved, if not perfect agreement, then at least a consensus on the fact that these three different views are not mutually exclusive or, indeed, opposites, but that they are all mutual requisites.

I hope that the discussions, criticism and proposals were all useful for the writer of this report. I also hope that the dialogue which was started during this process among the various parties involved will continue and prove helpful in putting the results of this report into practice.

Yrjö Lämsipuro

The cultural exportation project

The assignment

The cultural exportation project, a joint project between the Ministry of Education, the Ministry for Foreign Affairs and the Ministry of Trade and Industry, was started at a press conference at Parliament on September 5, 2003 by the Minister of Culture Tanja Karpela, the Minister for Foreign Trade and Development Paula Lehtomäki and the Minister of Trade and Industry Mauri Pekkarinen.

Minister Tanja Karpela appointed Docent Hannele Koivunen, Counsellor for Cultural Affairs, of the Ministry of Education, to review the present situation in cultural exports as Rapporteur ad int. from September 1, 2003 to May 31, 2004. Minister Paula Lehtomäki appointed a working group to support the work on the report. Minister Mauri Pekkarinen appointed expert staff for the project.

The final report of the cultural exportation project and the proposals for action contained therein were submitted to the Ministers who commissioned the work, at the Lume Media Centre on May 28, 2004.

The aim

The aim set for the cultural exportation project was to produce an overview of the present state of Finland's cultural exports and the obstacles, threats, success factors and potential linked with it, and to identify the areas which need special promotion. The report explored solutions and actions for developing the conditions for Finnish cultural exports, its networked structures and forms of cooperation, focused support, special investments and incentives so as to match the increasingly globalized demand for culture in the world today.

Resources

Work on the report lasted from October 2003 to May 2004. Tertiary education trainees Hanna-Maria Lifländer and Minna Salonen were appointed to help with the project from February 1 to April 30, 2004. A total of 10 person-work-months was used for the project.

On October 22, 2003, Paula Lehtomäki, Minister for Foreign Trade and Development, appointed a working group to support the project, whose chairman was Yrjö Länsipuro, Director General at the Department for Communication and Culture at the Ministry for Foreign Affairs and

secretary Eija Pouttu. The members appointed to the working group were the following:

- Ahokas, Paulina, director, Musex
- Autio, Iiris, producer, Tero Saarinen Company
- Nordström, Niko, BMG and ÄKT
- Kehälina, Raila, special advisor, Ministry of Trade and Industry
- Liulia, Marita, artist
- Mitrunen, Kari, senior counsellor, Ministry for Foreign Affairs
- Mustonen, Panu, managing director, HorizontalC
- Mykkänen, Jouni, managing director, Finnish Film Foundation
- Routti, Jorma, professor, Creative Industries Management Ltd, CIM
- Saha, Hannu, chairman, Arts Council of Finland
- Seppälä, Marketta, managing director, Frame
- Vuorenjuuri, Antti, managing director, Avarte
- Tarkka, Minna, managing director, M-cult.

The rapporteur met with some 250 experts and actors in cultural exports for personal interviews and meetings. Cultural exports were also dealt with at many meetings between officials from the participating ministries.

One of the noteworthy resources of the report was a cultural exports network consisting of 250 actors. Cultural exports actors in arts and culture compiled materials in their own field for the report. The active role taken by the arts and culture information centres in collecting information was of particular importance. The information centres arranged a seminar on cultural exports networks on February 25, 2004 in support of work on the report and about two hundred cultural exports actors took part in the seminar. Discussions during the seminar were compiled and analysed. The fact that the field of cultural exports actors has activated itself to work together to promote Finland's creative economy sector and cultural exports must be considered one of the important results of this process.

Other useful seminars and meetings linked with the subject included the following:

- Design for Business and History, April 2-3, 2004, Lume Media Centre.
- UM Press, Viestintä- ja kulttuuriosaston neuvottelupäivät, March 29 - April 2, 2004, the Department for Communication and Culture at the Ministry for Foreign Affairs.
- Image match: Dialogi; Helsinki Sponsorship Conference, March 10-11, 2004, Helsinki, Finlandia Hall.
- Publication event for Hanna Hemilä's report on international co-production projects in the film industry, March 9, 2004, Helsinki, Finnish Film Foundation.
- Start-up seminar for the Tekes technology programme on leisure time and the experience industry, March 9, 2004, Helsinki.
- Southern Ostrobothnia cultural exports seminar, December 9, 2003, Seinäjoki.
- Music industry competitive edge - Innovations and how to fund them, November 20, 2003, Research Institute of the Finnish Economy (ETLA), Paasitorni.
- Theatre exports seminar, October 30, 2003, Teatterimonttu.
- Networks and new media - changing cultural policy, September 26-27, 2003, Helsinki.
- Meeting of the directors of Finnish Institutes worldwide, September 22, 2003, Hanasaari.
- Teosto export seminar and publication of a report on the market value and structure of Finnish music exports, September 4, 2003, auditorium of the Finnish Film Foundation

The magazine of the European Movement for Finland, *Eurometri*, featured a series of articles on cultural exports in the European Union in connection with work on the report, published in *Eurometri* issues 3/2003, 1/2004 and 2/2004.

Methods

The starting point of the cultural exportation project was to collect the experience of cultural exports actors in the field and to use it to best advantage. It was decided that listening to the actors themselves would be the main method used. The project was implemented as a participatory, open and transparent process. On October 1, 2003, the project opened its own website on www.mineud.fi/opm/hankkeet/kulttuurivienti/index.html. A network of cultural exports actors was set up for the project, and about 250 actors applied to be included in the network. They were asked to provide information on the profiles, volumes, problems, threats, success factors and good practices in cultural exports in their particular field, and to suggest actions to take.

At the project's website, cAme software was used to create an electronic message board where visitors could comment on the project and read the comments of others. This was a way of creating the most extensive possible interface with actors in the field and to collect feedback from them. Some of the actors used the cAme facility for comment, but most preferred to use e-mail. Feedback showed that people felt the cAme facility was difficult to use. The cAme comments were, however monitored actively and 3500 visits to the site were logged.

At the first stage of the project during the autumn, the intention was to produce an overview of the present state, employment impact, trends and potential areas of growth of Finland's cultural exports based on the information obtained from the actors. The collection of information turned out to be so labour-intensive, however, that the timetable could not be kept to in this respect. The autumn was spent in building up the activity of the cultural exports network and in producing an overview of the basic information. The deadline set for the end of November was postponed in practice until the end of April-beginning of May. However, information was obtained from nearly all fields and actors.

The Rapporteur met with some 250 key actors in cultural exports for individual negotiations and

meetings. The results of these discussions were included in the project's information base, in an effort to access the tacit knowledge and experience of these cultural exports actors. This information was crucial in finding the right weighting for the proposed measures.

In order to collect international material for comparison, the Department for Communication and Culture at the Ministry for Foreign Affairs sent a questionnaire to 17 Finnish diplomatic missions, requesting the following information.

1. Profile and quantifiable volume of cultural exports.
2. Organizational and funding arrangements for cultural exports.
3. Links between cultural exports and EU programmes (where Member States were concerned).
4. Special features of cultural exports.

In addition, the respondents were asked to evaluate Finland's cultural exports so far to the countries where they were stationed, and opportunities for developing cultural exports there.

In order to obtain regional information, the Arts and Cultural Heritage Division of the Ministry of Education sent out a letter to the provincial Arts Councils, requesting information on cultural exports actors and projects in their regions. Two replies were received.

Information was collected on the maturity, quality, quantity, economic volumes, development trends, outcomes and good practices of the cultural exports of different branches of the arts and culture. Based on the experiences of actors in the field, an overview was made of the obstacles, success factors, strengths, weaknesses, opportunities, threats and proposed measures for action in the cultural exports sector.

During the second phase of the project in the spring, the collected information was processed and obstacles, threats, success factors, and opportunities of Finnish cultural exports were analysed with the aid of the information collected in Finland, feedback received and international comparisons. This was then used as the basis for selecting and

structuring the main areas needing promotion measures.

The fundamental starting point for structuring the material and finding proposals for action was that the entire value chain of cultural exports should function smoothly. The responsibilities of the public and private sector and the non-governmental sector were analysed for each stage of the value chain, and new forms of cooperation between these three sectors were sought.

The project also examined the impact of the form of an enterprise, taxation of culture and cultural exports, competitive restrictions and the legislation on immaterial rights on cultural exports. It was found that further investigation would be needed in these areas.

Material

It is a particular difficulty in collecting background information and materials in the cultural exports sector that the creative economy and cultural production have not hitherto been perceived as separate sectors in their own right. The sector is not structured into statistical categories and it is difficult to obtain reliable data on volumes. Statistical classification is slow to change and consequently cannot cover new and emerging sectors such as the creative economy. This problem applies to statistics both from Finland and abroad. Statistics Finland publishes a work entitled Kulttuuritilastot (Cultural statistics) every other year and works to develop cultural statistics. Finland is also involved in the development process of cultural statistics in the European Union in order to ensure uniform categories.

The material in this report consists of the following types:

- Literary material: monographs and articles.
- Personal interviews with actors in cultural exports.
- Materials supplied by the actors in cultural exports on cultural exports in their respective sectors of the arts and culture.

- The websites of actors in cultural exports, as well as administrators and funding bodies in the field.
- Replies from diplomatic missions to queries by the Ministry of Foreign Affairs.
- Materials from meetings and seminars.
- Statistics Finland's statistics on culture and mass communications and statistics from the various actors themselves.

The main function of the work on this report was to produce practical proposals for action to be taken. As a result, this final report could not be overly extensive. In keeping with the original assignment, the final report focuses on promoting cultural exports.

Actors in the cultural exports sector have hoped that the extensive material collected in connection with the work on this report could be put into a format which would benefit everyone. The materials will be placed on the website of the Ministry of Education in a more extensive format.

Thanks

In my capacity as Rapporteur ad int., I wish to praise the central government authorities for the ability to respond to rapid developments in the international creative economy and realize the potential for Finland in the cultural exports sector.

The input of the working group appointed to support this work and its chairman Yrjö Lämsipuro was invaluable, both in terms of active discussion and particularly in the search for good strategic guidelines and in shedding light on different viewpoints on cultural exports.

Cultural exports is a very extensive sector which takes in numerous sub-sectors of the arts and culture. This work could not have been done without an extensive support network. I wish to thank all the actors in cultural exports for their activity, the material they collected, the constructive comments they provided and the many sound suggestions for actions to be taken. Thanks to this fruitful cooperation, the results in this report are

based on experiences from the field. I also want to thank the officials from the participating ministries for their help in collecting information. Professor Anita Kangas, research director Ritva Mitchell and director Pekka Timonen also contributed very fruitful viewpoints. I also found my discussions with Statistics Finland's experts on cultural statistics, Seppo Paananen, Rauli Kohvakka, Jukka Ekholm and Aku Alanen, to be particularly useful.

In sifting through the mass of information

collected during the process of this work, the help of tertiary education trainees Hanna-Maria Lifländer and Minna Salonen was crucial; without them, it would not have been possible to process all the extensive materials, and I want to thank them for their diligence and hard work. I also wish to thank departmental secretary (?) Soili Arminen of the Ministry of Education and office secretary (?) Eija Pouttu of the Ministry for Foreign Affairs for their expert help.

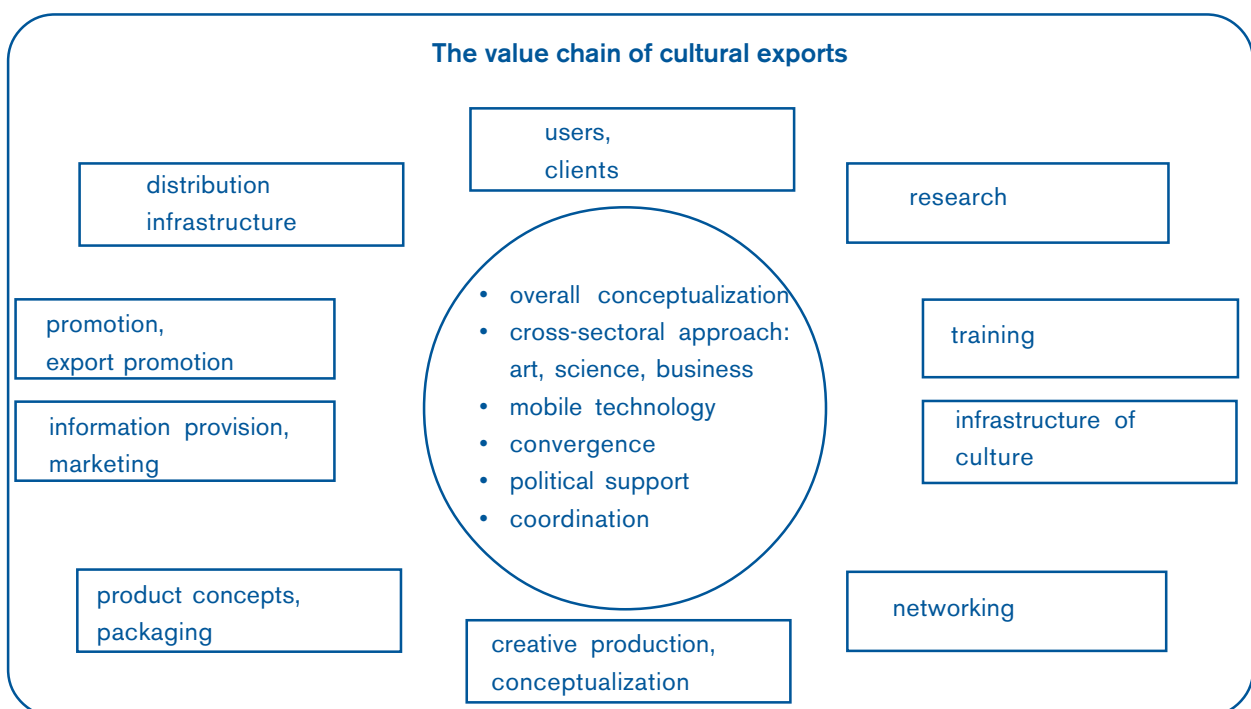
Conclusions

The value chain of cultural exports and a SWOT analysis

Actors in cultural exports were asked to give their viewpoints on the obstacles and success factors in cultural exports, strengths, weaknesses, opportunities and threats. The resulting plentiful material was

grouped and analysed against the value chain as a frame of reference to highlight the strategically most important and most frequent viewpoints on these.

The strengths of cultural exports from Finland lie at the beginning of the value chain. We have great creative capital, a high standard of education, training and research in the creative fields, strong



expertise in technology, a good domestic infrastructure for culture, a functional home market as a support for exports, a demanding domestic audience and a high standard of creative productivity. Other strengths include Finland's unspoilt natural landscape and the use of natural materials, traditional Finnish values such as simplicity and functionality and ethically and ecologically sustainable production.

Our opportunities come into view at the end of the production chain: our cultural production is highly regarded internationally, and at the moment, we cannot even fully supply the extensive international demand for Finnish culture in many diverse fields. The creation of the CREAMIN cluster for the creative economy sector and the general development of cultural production and exports as one of its core areas will open new markets along with globalization and EU enlargement. Our opportunities include crossing the boundaries between traditional narrow specializations toward multidisciplinary, multiartistic and multi-method applications. A transition will be made from a focus on products and materials to conceptualization, where cross-branding is a financially significant factor. Tekes, SITRA, Finpro, Finnvera, Finnish Industry Investment Ltd and venture capital funding in the sector create opportunities for identifying and developing export potential in new fields. Cultural significance can be integrated in the entire economy. Cultural exports support other exports. The key factors in drawing on these opportunities are increased personal contacts and networking, and attracting world-class artists and researchers to Finland. It is also important to encourage artists and researchers who study and

graduate here to stay in Finland.

Clear weaknesses which emerge are 'leakage points' of the value chain where information provision, marketing, promotion and export promotion are concerned, as well as a lack of strategy and coordination for cultural exports in administration in the sector. The structure of the sector is not competitive. What is needed is more entrepreneurship and business expertise, skills in marketing and communications and the management of immaterial rights, in order to get the entire chain of cultural exports up and working and so as to get a decent, internationally competitive price for the products concerned. Other weaknesses include a lack of capital and a low level of support for cultural exports from central government.

The threats at the level of the European Union as a whole are the Anglo-American dominance over the globalized media and entertainment industry, piracy and the 'China syndrome'. Finland's small language and cultural area is at once a threat and an opportunity. However, the biggest threats are one-sided expertise and a tendency to stick to a technology concept that is too narrowly defined in a situation where a broad-based concept of the creative economy has already emerged as an international competitive factor. Attempts to make fast profits are an obstacle to attaining high quality and long development cycles. As yet, Finland has no cultural enterprises of an international standard and a 'brain-drain' of artists going abroad to enlist with international agents is also a threat. In that event, the great input in education will fail to produce cultural or economic benefits for Finland. The challenge is to boost tolerance and multiculturalism in our society.

SWOT analysis of cultural exports

Strengths

EU membership, international treaties
 Creative capital: skills, training, research
 Strong expertise in technology
 Good domestic infrastructure and domestic market
 High quality
 Ethically and ecologically sustainable production
 Natural materials, simplicity

Weaknesses

Sectoral structure not competitive
 Technology-driven structure
 Strategy and coordination of cultural exports
 Information, marketing, promotion, export promotion
 Management of immaterial rights
 Entrepreneurship, business skills

Opportunities

The CREAM cluster
 The ethical dimension
 Cultural exports as support for other exports
 Multidisciplinary, multi-artistic and multi-method approach
 Increased networking
 Conceptualization, cross-branding
 Venture capital funding: exportation of new sectors

Threats

Globalization, the USA, the 'China syndrome'
 Finland's small cultural and language area
 Attempts to make fast profits
 One-sided expertise and narrow specialization
 Piratism
 Star cult focusing on success of individual artists
 Brain drain, artists leave the country

Proposed measures

The material collected, the interviews and contacts in general produced hundreds of proposals for measures which would help promote cultural exports. Some of the proposals concerned the macro-level of cultural production and cultural exports as a whole. Many, however, were proposals which concerned a specific field of arts.

During the work, it was proposed that a separate cultural export fund should be set up as a fast and flexible funding mechanism. It should be carefully considered whether a separate fund will support cultural production as its own, isolated 'island'. It is the Rapporteur's opinion that a more dynamic alternative is to support cultural exports as a natural part of the existing export grant systems, something which will also help cultural production become integrated as a competitive factor in the creative

economy.

What follows are the proposed measures for cultural exports as a whole. Where proposals focusing on individual sectors are concerned, a few key suggestions have been included in connection with the sectors in question in this report.

Implementation of the proposals for individual sectors could be undertaken through various funding mechanisms and programmes, for instance the cultural exports programme for the exchange of personnel and expertise, the development programme for cultural exports or within a more extensive context of the creative economy cluster as a whole.

The most important aspect of the proposed measures is the functioning of the entire value chain. Most of the proposals involve the strategic coordination of existing structures and resources and the creation of a shared operational view among

Starting points of proposals for action:

- Recognition and appreciation of the importance of the creative sector
- Recognition and appreciation of the importance of the people working in the creative sector
- Improving international interfaces
- Creation of an overall strategy for Finnish cultural exports
- Quality as a competitive factor
- International competitiveness
- Technology expertise
- Business expertise and entrepreneurship
- Reinforcement of a multidisciplinary approach
- Functionality of the value chain
- Coordination of the various functions

I. Promotion of cultural exports

1. Establish CREAMIN - the creative economy cluster of Finland
2. Set up a new President's Award for Cultural Exports
3. Develop cooperation between ministries in cultural exports
4. Launch a new development programme for the creative economy and cultural exports for 2005-2010
5. Promote cultural entrepreneurship and capital funding in the cultural production sector
6. Start a new programme for professional and expert exchange in cultural exports for 2006-2010
7. Create an information network for cultural exports.

the various actors.

The biggest development input will be needed in order to elevate Finland's creative economy sector into an internationally competitive sector alongside information and communications technology (ICT) and biotechnology by creating an extensive CREAMIN creative economy cluster and a supporting development programme for the creative economy and cultural exports for 2005-2010. It is proposed that Finland's cultural production and exports are developed as the core area of the CREAMIN cluster. Development input will also be needed in order to boost internationalization and networking, in order to boost business skills in cultural exports, improve the information base and strengthen weak areas of the value chain, i.e. information provision, marketing, promotion and export promotion.

Measures are proposed both for promoting cultural exports and ensuring the conditions for cultural production. Rapid additional resources are

needed particularly for the promotion of cultural exports.

The fundamental requirements for cultural production are relatively good in Finland by international comparison. The strengths of Finnish cultural production include a high standard of education and research in creative fields, arts and culture, good domestic infrastructure and an informed domestic market. Input in cultural exports and business expertise in cultural production must not undermine the fundamental requirements for cultural production, which will ensure continuing high quality in the future, too. Cultural production operates on long-term cycles; any input is likely to produce results decades later. As an example, the success of classical music in Finland today is based on the political climate in the late 1960s, which led to the creation of the world's foremost music education system in Finland. The results are evident today, a forty-year cycle later.

II. Prerequisites for cultural production

1. Education and research: multidisciplinary expertise, strengthening of the information base
2. Product development: a holistic view, innovation chains, conceptualization, cross-branding
3. Fundamental requirements for creativity: the working conditions of artists, infrastructure, the domestic market
4. Protection for intellectual property: copyright, protection of designs, patents, trademarks.

Promoting cultural exports

CREAFIN - Finland's creative economy cluster

- To be created: CREAFIN - Finland's creative economy cluster, whose core is to be made up of the meaning-intensive sectors: ICT, cultural production, service production, science and research, training and education, art and other sectors representing the production of meaning.
- The sphere of operations of the science and technology council to be expanded to include the entire creative economy and cultural production.
- The CREAFIN concept will be developed: a new brand for creative production in Finland, a guarantee of high quality and innovation.

International indicators clearly show that commerce in immaterial products and concepts, meaning-intensive production and the creative economy are emerging as significant competitive factors. Development of the creative sector has been chosen in many countries as a key strategy for ensuring international competitiveness. Development of the competitiveness of Finland's creative economy is a

critical factor both in view of European convergence and general globalization. International developments may constitute a threat, but expertise in the creative economy will also open doors to wide new markets.

In the creative economy, most of the price of the end product consists of planning. Planning is 'invisible' work, but it still needs doing, and by the right person. Immaterial production is not produced 'immaterially'. On the contrary, creative production is very labour-intensive, especially at the stage of product development. International networking in the creative economy demands a great deal of travel.

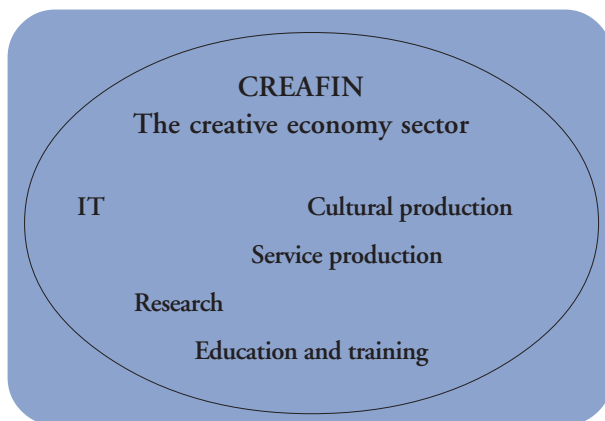
The creative economy sector has been identified and its importance has been understood. The development of this sector can be compared with the creation and development of the ICT and biotechnology sectors. In the case of these two sectors, central government played an important role in initiating development and creating the right conditions for growth. Input has been made in the development of information technology since the beginning of the 1990s, and thanks to this well-timed political decision and the subsequent political willingness to promote the ICT sector, Finland became one of the international leaders in the field. The faith in biotechnology has prevailed even during unfavourable economic cycles, and the results are gradually emerging. Similarly, we need the political will to develop the Finnish creative economy and a comprehensive strategy for it.

The international definitions and delineations of the creative economy sector are still unclear and even contradictory. Finland would be well advised to create its own definition and delineation of the creative economy sector, with meaning-intensive production as the criterion. This would mean that the sector would comprise ICT, cultural production and service production, education, training and research, science and art and applications of all these fields, as well as meaning-intensive business operations.

The small domestic market in Finland is an important foundation for cultural exports, but it inevitably demands an export perspective in all

fields of the arts and culture. Our technological expertise is among the foremost worldwide and developing technological applications for use in cultural production is an opportunity for the future. International demand for our cultural products is much greater than we can supply at the moment. In order to strengthen cultural production and promote cultural exports as the core of the creative economy, input and investments are needed.

In order to monitor the development and impact of the creative economy, the information base of the sector must be reinforced by developing research on statistics on immaterial capital and cultural production.



Strategic cooperation between the ministries in cultural exports

- A shared strategic vision for the various sectors of administration will be created through the founding of a joint permanent cooperation organ for the Ministry of Education, the Ministry of Trade and Industry and the Ministry for Foreign Affairs, which will coordinate and focus the resources for cultural exports so as to make it possible to commit to projects which exceed the budget season in duration. The organ will draw up a strategy for cultural exports and set up a cultural export cluster, which will clarify the division of labour of the partners involved (the Ministry of Education, the Ministry of Trade and Industry and the Ministry for Foreign Affairs).

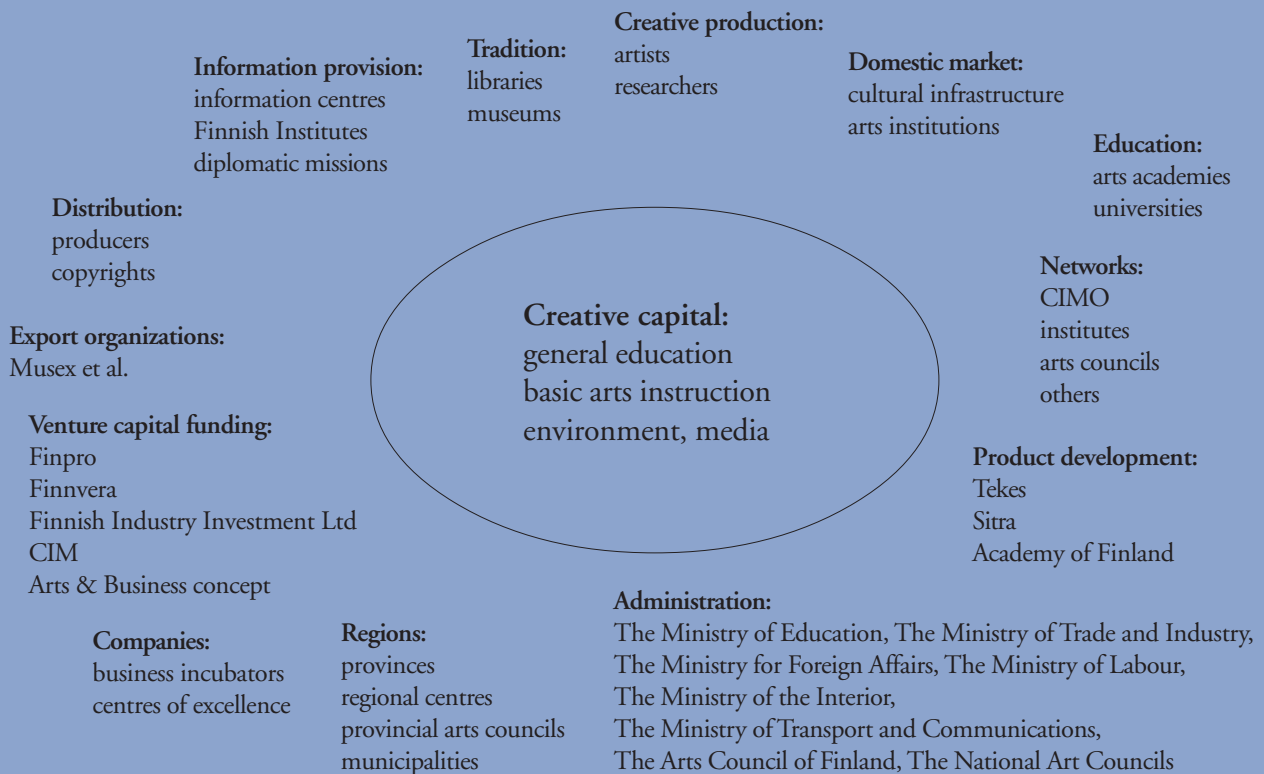
- As part of the ministries' joint cultural export strategy, joint criteria will be drawn up for supporting and promoting cultural exports, taking into account the entire value chain of cultural exports and enabling support for both artists, curators, managers, producers and companies.

The chief finding of this report is that the operators in cultural exports do not have a shared intention, criteria for support, a direction and strategy for developing cultural exports as a whole. The report proves that there is no need for the founding of new, heavy cultural export organizations, but that it is more important to ensure that the ministries and other existing organizations which provide direction and support for cultural exports at the moment are encouraged to operate as a cultural export cluster working toward a shared vision.

The cultural exports cluster is made up of:

1. Creative production
 - Culture creators
 - Cultural sector organizations
 - Arts and culture institutions
2. Information provision
 - Arts and culture information centres
 - Cultural and scientific institutions
 - YLE (the Finnish Broadcasting Company)
 - Finnish diplomatic missions
3. Networking
 - The Arts Council of Finland
 - The National Art Councils
 - The provincial Arts Councils
 - CIMO (the Finnish Centre for International Mobility and Exchange Programmes)
4. Education and research
 - Art Academies
 - Universities
 - Polytechnics
 - The Academy of Finland
 - Foundations
5. Product development
 - Tekes
 - Sitra

The cultural exports cluster



6. Cultural entrepreneurship

Cultural enterprises
Business incubators
Centres of expertise

7. Venture capital funding, export promotion

Finpro and creative economy export
promotion organizations
Finnvera
Finnish Industry Investment Ltd
Venture capital funding in the creative
economy, e.g. CIM, the Arts and
Business concept

8. Administration

The Ministry of Education
The Ministry of Trade and Industry
The Ministry for Foreign Affairs
The Ministry of Labour
The Ministry of the Interior
The Ministry of Transport and
Communications

The Presidential Award for Cultural Exports

- A cultural exports award to be awarded by the President of the Republic will be established, to be awarded amongst competitors who apply to be included in recognition of the most feasible export concept. The cultural export award competition will be implemented and prepared by the Ministry of Education and the Ministry of Trade and Industry together.

The cultural export award will emphasize the importance of cultural production as a core area of the creative economy and give visibility to new innovative concepts.

The development programme for the creative economy and cultural exports 2005-2010

- A development programme for the creative economy and cultural exports will be started, with the Ministry of Trade and Industry as the responsible ministry. The other actors in the programme will be the Ministry of Education, the Ministry for Foreign Affairs, the Ministry of Finance, the Ministry of Transport and Communications, the Ministry of Labour, Tekes, Sitra, Finpro, Mek, the Academy of Finland, the Arts Council of Finland, universities and other tertiary education institutions, foundations and funds, provinces, regional centres and municipalities.

The programme will coordinate the projects of various operators: the Ministry of Education's cultural heritage in the knowledge society strategy, the Government's entrepreneurship policy programme and information society policy programme, the Ministry of Trade and Industry's SILE programme for the development of content production, Sitra's development programme for the innovation climate, the City of Helsinki's cultural industry project and development programme for the innovation climate in the Helsinki metropolitan area.

During the programme, Tekes (the National Technology Agency of Finland) will be developed into LUKES (the National Creative Economy Agency of Finland) by expanding Tekes' sphere of operations to cover a broad definition of the creative economy sector, including meaning-intensive skills and product development on immaterial goods. Tekes has already implemented programmes connected with cultural production, but the present definition of its sphere of operations is still too limiting, and a broader definition is needed. In keeping with the broader definition of sphere, Tekes will then reinforce its expertise vis-à-vis the creative economy and cultural production.

The model which has been put forward during recent years suggesting that a separate 'National

Culture Agency of Finland', KUKES, should be founded alongside Tekes has been deliberately dismissed in this report for two reasons. Firstly, the founding of KUKES would require funding of at least EUR 200 million on an annual level, i.e. it is an alternative which is more difficult to implement purely in financial terms. Secondly, the KUKES alternative would be weaker in functional terms, because it would fail to implement the most crucial competitive factor of the future: development of the creative economy across the boundaries between sectors, disciplines, art forms and methods.

The programme will create a strong link between the measures undertaken by the business sector and by the government. The programme will integrate the development of cultural production and the creative economy as an integral part of the Ministry of Trade and Industry's entrepreneurship policy and export promotion. The aim is to create networks of small specialized companies. Through the development programme, the economic structure and exports can be diversified and new jobs created.

The programme will set clear quantitative goals for the growth of the cultural industry and exports and will decide on the role of the various actors in implementation of the programme.

The programme will fall into two distinct sections: Creative North and Creative Finland, which together will form an operating network.

Finland will present the initiative on the Creative North programme to the EU. The aim is to work together with the Nordic countries, the Baltic states and the Russian Federation to develop the Creative North programme as a part of the EU's Northern Dimension programme.

Creative Finland will consist of two parts: Creative Helsinki and Creative Provinces.

Creative Provinces will be a development programme focusing on the creative economy in Finland's provinces, creating a network for regional centres, urban and rural areas alike.

Creative Helsinki will be a development programme for the creative economy in the Helsinki metropolitan area, involving the municipalities in the entire area: Helsinki, Espoo,

Vantaa, Kauniainen, Kerava, Järvenpää, Tuusula, Sipoo and Kirkkonummi. The area has 1.2 million inhabitants, including most of the people involved in creative work in the entire country, and many of the educational institutions in the sector. The Helsinki metropolitan area is the driving force and magnet for Finland's creative economy, and its impact radiates outward to the surrounding regions as well.

The traditional targets for cultural exports have been the Nordic countries, the Russian Federation, Germany, the UK, France and Japan. In the future, emerging strategic markets will be the new EU Member States, Finland's neighbouring areas, Russia, China and India. Opportunities for exports may also emerge in South America. The programme's starting phase will take place during 2005 and the implementation stage in 2006-2010.

Cultural business operations: SMEs, venture capital funding and taxation

- Cultural entrepreneurship should be taken into account as SME entrepreneurship in the Government's entrepreneurship policy programme.
- A service portal for enterprises in the creative economy will be set up (Ministry of Trade and Industry).
- The availability of venture capital funding in growth-oriented creative economy companies will be ensured. Venture capital and project funding for cultural enterprises will be promoted (Ministry of Trade and Industry, Finnvera, Finnish Industry Investment Ltd, creative economy venture capital funding e.g. CIM, the Arts & Business concept).
- a study should be made of whether a lower VAT class on a par with that on books could be applied to other forms of culture, too. The report on this should take into account current trends in the EU and compare practices in other EU Member States and their effectiveness (Ministry of Finance).
- Applications of the corporate form of non-profit-making enterprises and their possible impact on cultural production should be studied. This report

should give an overview of the significance of non-profit-making enterprises in cultural production in other countries, their possible impact in increasing entrepreneurship in the creative economy and in lowering the threshold for becoming an entrepreneur, particularly among young people, and the significance of this corporate form as an interface between the public and private sector (Ministry of Trade and Industry).

The cultural exports personnel and expertise exchange programme 2006-2010

- Active international networking will be promoted and the opportunities offered by the EU will be used.
- A cultural exports personnel and expertise exchange programme will be started at CIMO, the Finnish Centre for International Mobility and Exchange Programmes. The resources for similar exchange programmes at the Arts Council of Finland and other cultural exports actors will be strengthened.
- The operating conditions of the artists-in-residence network will be secured (Arts Council of Finland).
- A joint strategy for networked operations will be drawn up for the culture and science institutes, as well as a regional overview from the perspective of globalization. The aim of this strategy is to develop the institutes as experts on networking and enhanced interfaces, which can maintain contact with actors in the countries where they operate. It is also an aim of the strategy to boost cooperation between Finnish diplomatic missions and the institutes in question.

During the work on this report, many of the actors in cultural exports emphasized the importance of international exchanges of personnel and experts for their own process of internationalization. The role of CIMO, the Finnish Centre for International Mobility and Exchange Programmes, was often felt to be a crucial condition for cultural exports, especially in the early stages of international networking. The forging of personal relationships,

networks and interfaces is a key factor in both internationalization and exports. As work on the report progressed, a number of excellent innovations and opportunities came to light, which had all failed because the people involved had not had access to sufficient funds to travel abroad to meet their foreign partners and networks.

The CREAMFIN information network for cultural exports

- A portal for Finnish cultural exports with links to the websites of the various actors involved will be set up at the Ministry for Foreign Affairs's Virtual Finland website.
- The support services for cultural exports provided by the kulttuuri.net portal will be developed.
- The role of information centres will be developed and focused towards international operations. The operating conditions for information centres for the arts and culture and export promotion organizations will be improved through creating a shared cultural exports information network for information and marketing for operators in different sectors (information centres, institutes, Finnish diplomatic missions, organizations promoting exports).
- Export promotion organizations will be set up for art sectors which are suited for export.

The key finding which arises from the materials processed during work on this report is that the cultural exports value chain 'leaks' systematically in almost all sectors at the same specific points, i.e. information provision, marketing, promotion and export promotion.

The basic input in education and training, research and infrastructure is in place and there is an international demand, but the necessary input in information provision, marketing and promotion of cultural exports is lacking. As a result, cultural production is not matched up with the demand which does exist. As a target group, foreign 'gatekeepers' and promoters are crucial. By improving the opportunities for the international operations of art information centres, the

information centres could be made into an efficient information network for cultural exports.

Among the various art sectors, music is clearly the most mature for exportation today. Music also has the best-functioning value chain for cultural exports. A separate export promotion agency, Music Export Finland, has been set up to promote exports. The information centres have a different role and in order to ensure effective exports, the various sectors each need a professional export agency, which can focus solely on that task.

Requirements for cultural production

Training and research

- It must be ensured that a variety of arts and crafts are widely taught within general education, in basic training in arts subjects and at universities and other forms of tertiary education.
- International interaction within training and research must be reinforced. The aim should be to attract international researchers of a high standard and students to Finland. Opportunities for foreigners who study and graduate here to stay in Finland should also be improved.
- The opportunities offered by the EU vis-à-vis training and research should be utilized.
- Skills in exports and business administration should be given a more prominent place in training for the creative sectors.
- Meanwhile, cultural awareness should be given a more prominent part in commercial and technical training.
- A multidisciplinary approach should be encouraged: interdisciplinary and interactive joint concepts involving science, art and technology. Innovative studies of a multi-disciplinary, multi-artistic and multi-method approach must be supported.
- Cooperation between the Arts Council of Finland and the Academy of Finland should be strengthened further by continuing multidisciplinary projects covering several sectors of the arts similar to the pilot project 'Interaction between art and science'.

- The standard and effectiveness of producer training should be assessed. High-standard producer training should be developed at universities and other tertiary education institutions, and contacts between training and working life should be reinforced.
- The information base for the creative economy must be strengthened by developing statistics in the creative economy sector, cultural production and immaterial capital.

Product development

- The innovation chain in the creative sectors and cultural production should be strengthened from basic research to applied research and product development. International and EU cooperation projects in product development should be started. There needs to be a transition from a product-centred view to an overall vision, total concept design and cross-branding.

Fundamental requirements for creativity

- The conditions for artists' work must be secured in accordance with the Government Resolution on art and artistic policy and the TAO programme which preceded the Resolution.
- The domestic infrastructure for culture must be maintained and improved. The domestic market must be maintained as the foundation for all creative production.

Protection for immaterial property

- Strong copyright protection must be maintained in information networks and digital materials.

Investments

There are two fundamental assumptions in this estimate of the size of the investments needed to develop cultural exports.

Firstly, it has been assumed that the existing actors - i.e. research institutions, Tekes, Sitra, Finpro, Finnvera, Finnish Industry Investment Ltd and venture capital investors in the sector - will create opportunities for identifying export potential in new sectors and developing them in accordance with a broad definition of the creative economy sector.

Secondly, it has been assumed that investments by central government is a part of a broader effort to develop the creative economy as a whole, which will also include investment and participation from regions and cities, the business sector and venture capital investors. In such a situation, the total input in the development programme for the creative economy and cultural exports could come to EUR 300 million during the programme period 2005-2010.

The following is a presentation of the total input needed from central government for measures proposed in the cultural exports report. Some of the proposed measures involve re-focusing and weighting of existing funding, which can thus be implemented within the framework of present funding. The input concerns new cultural export measures proposed in this report:

Central government input in proposed measures for cultural exports 2005-2010

	EUR thousand
2005	
• Report on the corporate form of a non-profit-making enterprise, Ministry of Trade and Industry	10
• Report on VAT classes for cultural products, Ministry of Finance	10
• Strategy for culture and science institutes, Ministry of Education and Ministry for Foreign Affairs	50
• Development of information base for the creative sector, Statistics Finland	30
• Virtual Finland cultural exports portal, Ministry for Foreign Affairs	50
• Presidential Award for cultural exports, the President of the Republic (preparatory work by Ministry of Education and Ministry for Foreign Affairs)	50
• Allocation of resources to arts information centres and export promotion agencies, Ministry of Education and Ministry of Trade and Industry	400
• Development programme for the creative economy and cultural exports, Ministry of Finance, Ministry of Education and Ministry of Trade and Industry	400
2006	
• Application of the strategy for culture and science institutes	500
• Cultural exports exchange programmes, CIMO, Arts Council of Finland and others	400
• Presidential Award for cultural exports	50
• Development of information base for the creative sector	50
• Allocation of resources to arts information centres and export promotion agencies	2000
• Development programme for the creative economy	12,000
2007	
• Application of the strategy for culture and science institutes	500
• Cultural exports exchange programmes	400
• Presidential Award for cultural exports	50
• Development of information base for the creative sector	50
• Allocation of resources to arts information centres and export promotion agencies	2000
• Development programme for the creative economy	14,000
2008	
• Application of the strategy for culture and science institutes	500
• Cultural exports exchange programmes	400
• Presidential Award for cultural exports	50
• Development of information base for the creative sector	50
• Allocation of resources to arts information centres and export promotion agencies	2000
• Development programme for the creative economy	14,000
2009	
• Application of the strategy for culture and science institutes	500
• Cultural exports exchange programmes	400
• Presidential Award for cultural exports	50
• Development of information base for the creative sector	50
• Allocation of resources to arts information centres and export promotion agencies	2000
• Development programme for the creative economy	14,000
2010	
• Application of the strategy for culture and science institutes	500
• Cultural exports exchange programmes	400
• Presidential Award for cultural exports	50
• Development of information base for the creative sector	50
• Allocation of resources to arts information centres and export promotion agencies	2000
• Development centre for the creative economy (Expanding the operations of Tekes and merging certain other operations)	20,000
Total 2005-2010	90,000

CREAFIN vision 2010

Measures and investments proposed in this report and in the development programme for the creative economy and cultural exports 2005-2010 will produce concrete cultural, ethical, social and economic results by 2010.

The cultural and artistic effects will be evident as a high and competitive standard of Finnish cultural production. Finnish culture products will not attempt to compete with mass-produced goods, but instead, will represent the pinnacle of meaning-intensive production. As a brand for Finnish cultural production, CREAMFIN will guarantee quality and the latest innovations. As an attractive area in terms of its creative economy, Finland will attract world-class artists, whose work will be reflected in a cumulation of creative capital, and as an upward spiral of creativity.

Ethical significance is taking on increased importance in global cooperation, both in terms of environmental interests and people's wellbeing. In the future, ethical production standards will become a criterion for choosing creative economy products, concepts and consumer 'goods' too. Ethical capital is a part of social capital. Finland's unspoiled nature,

ecological and sustainable production, and natural materials together with values such as simplicity and functionality are resources for the creative economy which will reinforce appreciation of Finland and our position as experts in global cooperation.

The proposed measures will help our social capital grow and make creative capital a core area of social capital. With the aid of our social capital, we will be able to develop a creative welfare society based on multiculturalism, interaction and tolerance. The creative economy gives us the potential for continuing to develop Finland as a country which has the ability to mediate and balance conflicts and alleviate the risk of potential conflicts. Security and trust form a good seed bed for creativity.

The creative economy will restore Finland's competitiveness to a high global standard. Creative capital will be Finland's foremost competitive advantage. The number of enterprises involved in cultural production will reach 40,000. The growth of the creative economy and cultural production and the increase in exports from these sectors will boost employment in the creative economy to 40% of the workforce, while cultural production will account for 15% of the workforce and 10% of GDP.

CREAFIN vision 2010

Cultural dimension:

1. High artistic standards
2. Expertise in meaning production
3. CREAMFIN introduced as Finland's brand
4. Finland attracts top talent in the creative sector
5. Finland becomes an attractive area in terms of its creative economy.

Ethical dimension:

1. Ethical capital will grow
2. Ethical production standards will reduce conflict
3. Ecological production, sustainable development
4. A society with equality
5. Role as expert in global cooperation
6. 'Fair trade cultural exchanges'.

Social dimension:

1. Social capital grows
2. Creative capital becomes a core area of social capital
3. A creative welfare society
4. An interactive society
5. Multiculturalism
6. Balanced regional development.

Economic dimension:

1. Creative capital becomes Finland's foremost competitive advantage
2. Employment in creative economy will reach 40% of workforce
3. Employment in cultural production will reach 15% of workforce
4. Enterprises in cultural production reach 40,000 enterprises
5. Cultural production will account for 10% of GDP.

Cultural exports — structure and meaning

Cultural production – the key concepts

Cultural exports

By 'cultural exports' we mean the transfer of cultural meaning from one cultural sphere to another, in the context of the Cultural exportation project.

People's understanding of the world is formed by generating concepts to describe phenomena. The generation of concepts and the power of symbols have become part and parcel of the development of society. With the rhythm of the quarterly economy, the speed at which concepts are generated and exchanged has increased along with everything else. A new set of concepts means new expectations for output and consumption. As globalization increases, new sets of concepts spread rapidly outwards from the cosmopolitan metropolises to wider areas and on to the periphery. Concepts become weaker the more often they are repeated, giving rise to a need to create a new concept to confer a momentary competitive advantage.

The purpose of this report, according to the wording of the commission, is to find ways and

means of promoting cultural exports. The concept of cultural exports is linked with the complex network of concepts related to cultural production that can be thought of in everyday language as meaning the commercial exportation of cultural production to other countries. Cultural exports and the relationship between culture and the economy are two well-established phenomena that have been described using different concepts at different times.

The broad concept of 'cultural operations' covers the production of material with meaningful content, in other words the whole of human civilisation.

The concept of the 'cultural sector' covers creative work in different branches of the arts in the traditional field of the arts and culture, right through to distribution. The 'creative sector' is a parallel concept to the 'cultural sector', which appears particularly in the English-speaking world and in practice often approaches the concept of the 'copyright industry' in its extent.

The 'entertainment industry' as a concept arose in the early twentieth century along with the emergence and growth of the entertainment industry in the United States.

The 'culture industry' entered the public consciousness along with the Frankfurt School and the arguments of Theodor Adorno in the 1940s. As

distinct from autonomous art, the culture industry produced standardized products and culture became a consumer commodity. Ease of duplication and an approach that focuses on electronic production are two criteria that both apply to film, television, radio, publishing, the recording industry and digital content production.

The concept of 'content production' emerged in the 1990s based on the new ways of producing, recording and distributing culture in digital form, that were made possible by information technology. The concept and identity of 'content business' have emerged alongside the concept of content production.

The concept of the 'copyright industry' is defined as being a part of the whole spectrum of intellectual property rights (copyright, registration of designs, trademarks, patent rights) as the protection of intellectual property seen from the point of view of controlling distribution.

The concepts of the 'experience industry', the 'experience sector', the 'experience economy' and 'experience production' emerged in the 1990s to describe a new way of life aimed at self-fulfilment and experience consumption, which took the form of growth in the consumption of cultural commodities.

The concept of 'cultural production' refers to the concepts of culture and production, i.e. the exchange of cultural products. The concepts of 'creative production' and 'meaning production' were already appearing in the literature in the 1970s, but at that time they did not develop into predominant concepts. Creative production is the exchange of cultural meaning, which takes place when a creative product is formed. The idea of the semiotic significance of a product or concept is only now emerging as the nub of the debate. The exchange of meaning in creative production is in a primary relationship with the physical product and the quality aspect is always involved.

A creative product is defined as a product or service with a financial value that is based on creativity. In creative production, the lion's share of the price of the end product is the immaterial design that goes into it. Often, when a product of

this nature is launched, it gradually changes so that the design contribution lessens as repetition increases.¹

John Howkins uses a concept of the creative economy which is defined through the exchange between the creative sectors and creative products. Richard Florida approaches the creative economy by defining its working life, i.e. via the 'creative class'. The creative class consists of workers whose work is quintessentially made up of symbolic-analytical action and production.

Public administration in Britain defines the creative sectors as follows: "Those industries 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".

Rolf Jensen talks about the dream society and the story economy. He divides the dream society into various markets: the adventure market (surprise, challenge, intellect), the love market (care, health, friendship), the identity market (life style, personal values) and the peace of mind market. These markets are thus based on values that can be divided up into culture and cultures. There is space, too, for the tradition market, the safety market and the creative market.

Jensen's ideas about selling dreams gives a good picture of the way things have changed. We are switching over more and more from goods and product centred production to the productization of concepts, lifestyles and dreams, to the creation of operating models and overall concepts. Concepts are wide-ranging and characterized by cross-branding, in other words offering the same concept via different platforms and different tools.

In 1962, Fritz Machlup introduced into the debate the idea of the importance of intellectual investment and human capital. The concepts of intellectual capital and creative capital soon followed. Creative capital is part of social capital and its core is made up of immaterial capital, production processes and distribution channels.²

The idea of 'creativity' is linked more and more often with the economy and competitiveness. Creativity involves producing new meaning and

linking things together in new ways. Creativity is not only connected with art, culture and science, but with all forms of human activity. Creativity may have been developed during evolution so that mankind could adapt to and survive in a changing environment. All art is not creative; there are ritualised and institutionalised forms of art and cultural activity where new meaning is not generated, but old meanings are simply repeated.

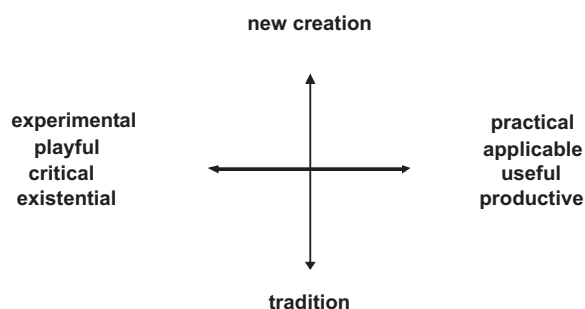
'Innovation' is the introduction of new creations or bringing the meaning of new creation into common use by society. This may happen through the productization of creative meaning, i.e. by the production of creative products. Creativity emerges in the right conditions and in the right operating environment. Innovations are thus consolidation processes in creative meaning combined with changes in social behaviour.³

Culture and the economy – fire and water?

In the course of writing this report, the question of the relationship between pure art and commercial art has repeatedly come up. These areas are sometimes seen as belonging to entirely different worlds and it has been said that cultural exports should only cover art and culture that generates a profit.

Many science policy documents define basic research as research which is free from all controlling interests. Donald Stokes, the American academic who studied science policy, said that theoretical and practical interests are not mutually exclusive. Stokes' four-cornered matrix can be applied as an analogical model to the debate between pure art and commercial culture. In it, the innovation chain is not seen as one-way and linear, but as an alternative referential framework in the form of a 2X2 matrix with dimensions that extend from increasing our basic knowledge of the world to the practical application of knowledge.⁴

Creativity- innovation - productivity



Defining cultural exports as the exchange of cultural meaning involves, above all, processes of interaction and cooperation. The definition covers both commercial and non-profit-making cultural production. Both areas are important in strengthening the cultural exports value chain.

The new definition of cultural exports covers the needs of and opportunities offered by interaction in a globalizing world. The model that was previously based purely on the idea of exports has changed into one of cultural partnership between different cultures, where products and productions from other cultures are brought to Finland on an interactive basis. This means, for example, that cultural tourism in Finland and the cultural events organized in Finland come within the concept of cultural exports.

As a sector in the creative economy, cultural exports is a profit-making industry. The concepts of cultural exchange and cultural exports are traditionally limited to making Finnish art, architecture, design and industrial design well-known abroad and exporting cultural products and events from Finland to other countries. Finland's membership of the European Union and cultural globalization have created a situation in which it has become necessary to define the concept and content of cultural exports in a new way. Every country encounters multi-culturalism within its own borders and the Internet has developed geographically fragmented virtual cultures, as well. For these reasons, the old geographical and regional

view no longer provides a sufficiently strong starting point.

One vigorously growing sector of cultural exports is exporting expertise, or 'brain circulation' as opposed to 'brain drain'. Brain circulation takes place at seminars and workshops, congresses and other events, through artist-in-residence and expert exchanges, and at the individual level. Its aim is the exchange of know-how, growth in intellectual capital and investment in knowledge.

Considered as the exchange of cultural meaning, cultural exports, at their extremes, also cover the international operations of companies and the increasing internationalization of society as a whole. They touch on development cooperation, cooperation with neighbouring areas, immigration, multiculturalism and indigenous peoples. These areas can be used to create channels for communication and marketing.

In a world of globalization, international interaction takes place more and more unofficially at the level of individuals and groups, not through government guided activity. Cultural production is generated by individuals. Governments can create the structures and conditions that promote the culture industry and cultural exports. Thanks to technology, networking is now possible over huge geographical distances. The Internet can be used to find partners for marginal cultural groups and for keeping in contact with them all over the world. There are also opportunities to create virtual groups and virtual cultures.

Cultural export sectors

The cultural export sectors are film, classical music, popular music, other forms of music, literature, the visual arts, design, architecture, handicrafts, industrial design, theatre, dance, circus and the performing arts, art and culture in the digital media, radio and television, computer games, cultural events, cultural and eco-tourism, and cuisine. Cultural exports also covers children's culture and service concepts in the cultural sector, such as Finnish library concepts, museum applications, physical exercise and sport.

Actors in the cultural exports sector

- Among the most important actors in the cultural exports sector are the people who create art: artists and designers. Many Finnish artists have opened up cultural export channels by networking at the personal level and by developing international contacts.
- The producers of culture have a key role in cultural exports in all sectors of the arts and culture. The success of Finnish culture in recent years correlates with learning how to produce.
- Firms in the cultural sector are focusing their activities more and more on international markets.
- Finland's art and cultural institutes abroad form a network covering a field of activity that is linked to art and cultural exports.
- Key promoters of cultural exports are the information centres for the different arts plus organizations and foundations that promote exports (the Finnish Theatre Information Centre, the Dance Information Centre, the Finnish Literature Information Centre, the Finnish Music Information Centre, the Finnish Fund for Art Exchange (FRAME), Design Forum, the Finnish Film Foundation, Music Export Finland (MUSEX), the Performing Music Promotion Centre (ESEK), the Foundation for the Promotion of Finnish Music (LUSES), the Promotion Centre for Audiovisual Culture (AVEK), the Finnish Broadcasting Company (YLE), YLE Export, Neogames).
- Cultural and eco-tourism companies plus the firms, organizations and other creative actors that produce programmes of services for them try to access the international public through Internet marketing.
- The network of international contacts created by arts festivals is an important channel for cultural exports (the Savonlinna Opera Festival, the Kuhmo Chamber Music Festival etc.)
- Arts and cultural institutions carry out a great deal of international cooperation, part of which is in the form of cultural exports (opera, museums, theatre, orchestras, libraries, the Finnish Film Foundation).
- The activities of many arts and cultural

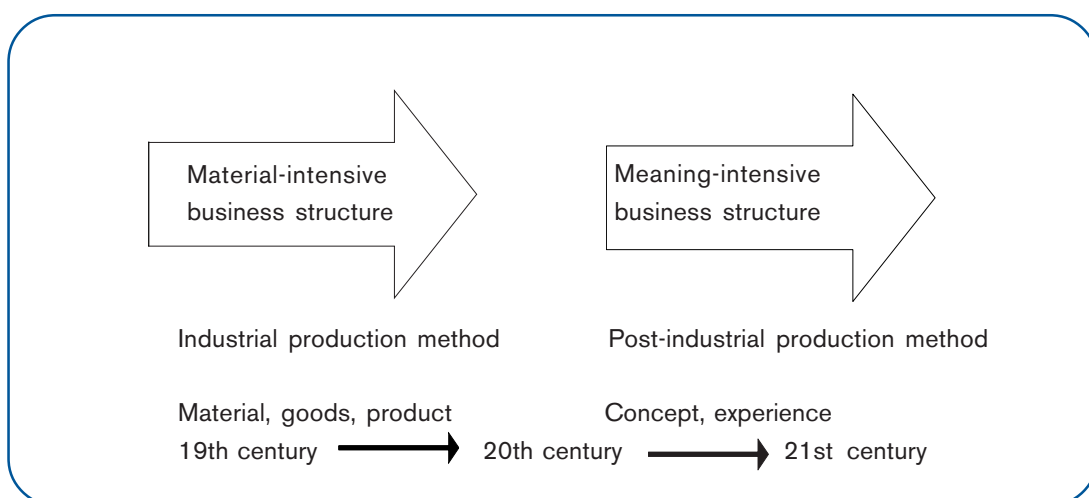
organizations include international cultural exchange and commercial cultural exports.

- The Finnish Broadcasting Company engages in international cultural exchange and sells programmes internationally.
- Government cultural exports come under the purview of the Ministry of Education, the Ministry for Foreign Affairs (Department for Communication and Culture) and the Ministry of Trade and Industry (Finpro, Finnvera, Tekes, MEK, Finnish Industry Investment).
- Cultural exports are financed by the Academy of Finland, foundations, companies and other sponsors.
- Research and training organizations take care of increasing know-how and expertise in cultural exports.
- The most important promoters of cultural exports include non-profit-making publications (Books from Finland, Finnish Music Quarterly, Form Function Finland, Frame News etc.)
- Local authorities and Regional Councils finance cultural exports to some extent.
- International activities by churches and congregations also involve cultural exports.
- The varied interactive international relations of society at the grass-roots level include a good deal of cultural exchange, cultural exports and friendship societies.
- The media are responsible for the availability of information about cultural exports.

Outlook for the creative economy

The globalization of the economy has reached a stage where the most important forms of capital have become social and cultural capital and creativity. The key factors in the development of globalization that also affect culture and the creative economy are the movement of capital, the attractiveness of investments and capital, the movement of goods and services, the movement of work and the movement of people. For cultural diversity, globalization is both a threat and an opportunity. A global concentration of the media will cause homogenization and reinforce the status of dominant cultures, but on the other hand, technology will create new opportunities and new channels for genuine diversity and, for example, for widespread marketing of local cultural products on the Internet.

On the basis of Jane Jacobs' theory of the development of cities, Richard Florida has brought up the three Ts (Technology, Talent and Tolerance) as the reason for regional development and as competitive factors in the creative economy. In his book *Europe in the Creative Age*, Florida compares the competitiveness of different countries in the light of these competitive factors.⁵ A comparison has also been carried out in Canada, based on Florida's ideas, in which indices have been developed in a more practical direction.⁶



Since Florida's ideas about the creative economy and the creative class seem to be among the most quoted and utilised concepts, it is worthwhile going into it a little more thoroughly at this stage. The conceptual problem for Florida is the narrowness of the concept. Creativity is not dependent on profession, operating sector or positioning in a class hierarchy. A class society based on the concept of creativity may, on the contrary, paralyse society's creativeness and innovation. A good thing about Florida, is that he examines the innovation capacity of the creative sectors, which is based on extensive cross-sectoral interaction, and makes it a subject of debate.

Florida uses a concept of the creative economy which is broader than the cultural sector and he includes in the creative class everyone who does creative, intellectual and conceptual work: scientists, engineers, musicians, architects, managers, instructors and researchers. Florida starts out from the premise that people's professions are divided into four classes: the creative class, the working class, the service class and those engaged in primary production. The creative class consists of two groups: the super-creative core and creative professionals.

The management of globalization is based on mutually agreed ground rules that support sustainable development. The values that are highlighted in development policy are justice, social responsibility, peace, a clean natural environment, economic stability and an ethical economy. These are also the competitive factors in the creative economy.

Boosting competitiveness is still an important issue; the developing countries in Asia in particular are closing the expertise gap. Thus, input in the continual improvement of science, product development and work place activity will continue to be important. The technological, cultural and social resources characteristic of Finland must be actively reinforced and new areas such as the creative economy must be found to give a relative competitive edge.

The key trend in economic life in the long term is the dematerialization of economic production

and consumption. An ever-increasing part of production is immaterial and the cultural characteristics of products and services are becoming of primary importance in consumption. Cultural production is going to exceed physical production in terms of both meaning and turnover.⁷ Processing cultural meaning and adding it to the product increases the cost of the raw material more than any other factor. We are going to be switching over from the consumption of natural resources to the consumption and exchange of immaterial and human resources. The creative economy will be seen more and more clearly as a business sector of its own, which has major economic significance.⁸

Electronic commerce will continue to grow. The benefits of the Internet are an increase in knowledge, improved communications, easier access and increased company acceptance in target markets. The disadvantages of the Internet are associated with the technology, but they can be corrected with better network tools, better software, better maintenance and better user training. The obstacles to electronic commerce are security, cost and legal factors. /9/ Culture is often seen as an obstacle to electronic commerce but the concept of 'bridge culture' has been put forward, meaning the fact that the Internet is able to create virtual worlds and cultures that are independent of geographical location.¹⁰

Developments in Finland

The Finnish economy and the structure of the business world in Finland have changed rapidly following the freeing up of the financial markets. The State has become a strategic operator that has made a crucial input into the country's changeover to an information-sector-led economic system. Expertise-intensiveness was viewed as a key competitive factor and this outlook has generated a corresponding joint national will which has resulted in a doubling of Finland's investment in research and development in the 1990s. The information and communications cluster, which is responsible for a significant proportion of Finnish exports, has

been developed into the new pillar of the Finnish economy.

Investments in technological expertise in Finland were made at the right time, but times have changed and technology alone is no longer enough; other creative competence has to be combined with technology in the innovation system. At the moment, competence capital in Finland is too one-sided and technology-biased. According to the VTT technology barometer, Finland is still in transition from an information society to a knowledge society. Finland had great success in developing the technical infrastructure for the information society, but now, technology is no longer the most important motor for development. What is called for now are content and applications, and Finland is no longer in the vanguard. The new information environment calls for new models for doing work in order to realise the potential productivity benefits. According to an assessment of the Finnish innovation system published by the Ministry of Trade and Industry, Finland's innovation system still calls for a good deal of improvement, however.¹¹ In improving the innovation system, the aim is to achieve as much cross-sectoral cooperation and interaction between the different sub-sections of the creative economy as possible, between science, technology and art.

Finland has switched from an industrial society to a post-industrial or post-modern era, which has culture at its core. In developing a national innovation system, cultural meanings have already been found attractive as a competitive factor and, in compliance with the Government Programme, work has started on drawing up a national creativity strategy.¹²

Finland has already risen to become one of the world leaders in a number of international comparisons measuring competitiveness and the introduction of technology.

Comparisons of the information society

The 2002 Human Development Report on the UN Development Programme names Finland as the

most technologically developed country in the world.⁷

The World Economic Forum's (WEF) 2003 comparison assesses the operational readiness of Finland's information networks as being the best in the world.¹³

The Swiss Institute for Management Development (IMD) has assessed Finland's technological infrastructure as being the third most developed amongst the small national economies.¹⁵

The World Economic Forum (WEF) rated Finland's as being the best in the world in a comparison of networkin.¹⁴

Comparisons of competitiveness

In 2003, the Swiss Institute for Management Development (IMD) assessed Finland as being the most competitive country with an economic area covering less than 20 million people. However, in the Institute's latest comparison, from 2004, Finland had dropped from first to eighth position. The best of the major countries was the United States of America.¹⁵

In 2002, the World Economic Forum (WEF) assessed Finland's present and future competitiveness as being second only to the United States in relative terms. In 2003, Finland had overtaken the USA in the competitiveness tables and become the world leader.¹⁴

The New Zealand Institute of Economic Research (NZIER) has drawn up a report entitled *Building a case for added value through design*, which compares the global competitiveness of different countries in the design field. In this comparison, Finland is ranked world number one. Next come the USA and the Netherlands. Finland's best-known international brands are Nokia, Fiskars and Finlandia.¹⁶

Finland's excellent placing in comparisons of competitiveness is partly due to corporate management attitudes and expectations. According to some researchers, these results may have more to say about confidence than competitiveness.

Confidence in Finland's ability to attract international business as a location has fallen and the results have begun to be affected by the 'China syndrome'.

In the light of statistics, Finland is no longer so well placed. For example, in a comparison of competitiveness published by the EU at the beginning of 2004, Finland is placed somewhere around the EU average.¹⁷

Innovation comparisons

According to the EU comparison published in 2002, Finland, Sweden, Denmark and the Netherlands are the leading European countries in producing innovations and switching to an expertise-based economy.¹⁸

According to the index of innovation capacity, Finland is placed third in international comparison, after the USA and the UK.¹⁹

Florida has developed various indices and combinations of them as gauges of the competitiveness of the creative economy, the most extensive of which is the Euro-Creativity Index. This consists of three sub-indices: the Talent Index, the Technology Index and the Tolerance Index. Finland is placed third in the Euro-Creativity Index, after Sweden and the USA.

The figures are based on the statistics produced by the International Labour Organization (ILO), and according to Florida's estimate, some 28.6% of the population of Finland work in the creative economy, in its broadest sense. This figure puts Finland in fifth position and the USA in the top slot with 30.08%.

The Euro-Talent Index consists of three figures:

1. The Creative Class Index, the size of the creative class in relation to the population as a whole.
2. The Human Capital Index, the percentage of the population aged 25-64 with a first degree.
3. The Scientific Talent Index, the number of engineers and persons doing scientific work per thousand employees.

Finland comes second in the Euro-Talent Index after the USA.

The Euro-Technology Index is made up of three figures:

1. The R&D Index, R&D costs in relation to gross domestic product.
2. The Innovation Index, the number of patent applications per million of the population.
3. The High-Tech Innovation Index, the number of high-tech patents (biotechnology, information technology, the pharmaceutical industry, the aerospace industry) per million of the population.

Finland comes third in the Euro-Technology Index after the USA and Sweden.

The Euro-Tolerance Index is based on three figures:

1. The Attitude Index, which refers to attitudes towards minorities.²⁰
2. The Values Index, which is based on questions about God, belief, nationality, authority, the family, women's rights, divorce and abortion.
3. The Self-Expression Index, which talks about the rights of the individual and values of self expression, and is based on questions about self expression, quality of life, democracy, science and technology, leisure, the environment, trust, the politics of protest, immigrants and homosexuals.²¹

In the Euro-Tolerance Index, Finland comes third after the USA and Sweden.

The Euro-Creativity Trend Index describes the growth in expertise and technology since 1995. It consists of a number of sub-sections which are the growth in the size of the creative class, the growth in scientific expertise, the growth in number of patents, and the growth in research and development. In the Euro-Creativity Trend Index, Finland is in second place after Ireland. Sweden comes seventh and the USA is tenth.

The Florida indices raise a number of questions, insofar as countries that are traditionally good at design like Italy are not necessarily well placed in

the comparison although their creative output is substantial. Finland's high placings in many international comparisons perhaps shows best that Finland has invested heavily in expertise. Finland has a good deal of potential in creativity, technology and expertise, but the national innovation system has not been honed sufficiently to utilize this potential to the full at present in production and in business.

Two Finnish researchers, Markku Wilenius and Pekka Himanen, have suggested that Finnish expertise and the Finnish innovation system should be developed along the lines of Hawkins' and Florida's concept of the creative economy, so that all the creative branches could be united in one creative economic sector.

In his book *Luovaan talouteen* (Towards a creative economy), Markku Wilenius stresses the importance of supporting creativity and cultural expertise as a national priority and as a strategy for Finland's future success and national competitiveness. According to him, one of the particular challenges for the information society based on Finland's top expertise is the systematic and broad-based utilisation of cultural capital. Wilenius recommends the following action:

1. Taxation practices should be reassessed to increase tax reductions on corporate donations for promoting art or science.
2. Activities in the public sector should be made more long-term, for example, granting public funds to actors in the cultural sector.
3. Civil servants in national cultural administration should be better informed about the direction in which sponsorship is currently developing.
4. The business know-how of cultural actors and cultural institutions, in particular, should be systematically promoted.
5. A culture promotion centre, Kukes, should be set up to invest in the systematic development of cultural innovation and cultural expertise.
6. Finland needs intermediaries to promote contacts between business and the arts and culture.
7. A corporate culture that is creative and innovative has to be considered successful. In the future, top

management is going to need more training in developing and leading creativity.

8. The private sector will have to open-mindedly seek new ways of cooperating and interacting with the cultural sector.⁷

Pekka Himanen, in his report *Välittävä, kannustava ja luova Suomi* (Caring, encouraging, creative Finland), drawn up for the Finnish Parliamentary Committee for the Future in 2004, proposes the following measures linked with culture and the creative economy:

1. A creative economy, headed by information technology and the culture and wellbeing sectors, should be established. In order to finance this, the national research and development budget should be raised from 3.6% of GDP to 4.0% of GDP.
2. Care must be taken to ensure that culture is also financed in absolute terms.
3. The Academy of Finland should establish a separate fund to provide money to bring top international researchers and artists to Finland. The aim is to bring five researchers and five artists to Finland every year.²²

International indicators of cultural production

Cultural meaning is being used more and more in all forms of production and in all sectors of society. Cultural exports are being practised in all branches of creative production. This development is difficult to describe quantitatively, as in different countries, different areas are classified as coming under the heading of creative production. This means that commensurable statistics do not exist and comparisons over time are difficult to perform. However, it is possible to get a grasp of the overall situation using indicators that describe the volume of the creative sector.

Research has shown that creative production as a percentage of GDP has exceeded growth forecasts. The commercial value of the international cultural industry grew during the period 1993-1998 from USD 95 billion to USD 388 billion. Growth in

creative production is more rapid than economic growth on average. In the United States, Australia and the Netherlands, growth in creative production has been more than double the growth in the rest of the economy over the last few years. In the United States, the copyright industry has risen to be one of the most important export sectors.²

In the United Kingdom, the culture sector makes up 9.1% of GDP. Unlike Finland, the UK classes the textile and clothing industry as cultural production, that is the value of the end product is deemed to consist of cultural meaning. Over the period 1997-2000, the average annual rate of growth for the sector was 10%, while growth as a whole was only 2%. A broad-based campaign to develop the creative economy has been started in London, in which the London Development Agency has set up a GBP 50-million fund to support London's cultural industry with the idea of creating 200,000 new jobs over the next ten years and increasing the value of the city's culture industry to GBP 32 billion. London is described as a magnet for the creative economy. The culture industry is the city's most rapidly growing sector and London's multiculturalism is seen as the motor for this. The creative economy is also a competitive factor in the regions. For example, the cities of Manchester and Glasgow are investing in this area. In the USA, culture and entertainment make up the biggest export sector with a 7.8% share of GDP.²³

Eurostat, the EU statistics office, has been keeping account of the number of people working in the cultural professions and the cultural sector for a long time. The information is based on manpower studies by the Member States. The accompanying table shows preliminary (and so far unpublished) data on the size of the cultural work force in the Member States.²⁴

Those working in the cultural professions and the cultural sector as a percentage of the total work force in different EU Member States in 2002

The 15 EU Member States: 2.6%
New Member States: 2.0%

Denmark	3.1%	(80,000)
Finland	3.5%	(79,000)
France	2.1%	(434,000)
Ireland	2.7%	(43,000)
Italy	2.2%	(453,000)
Sweden	3.3%	(140,000)

Source: Eurostat

The indications are that the number of people working in the cultural sector is about 2-4% of all people at work. The proportion does not vary greatly from country to country, but is made up of different groups in each country. Apart from the proportion, the actual number is important. Italy has 453,000 (2.2%) people available in the cultural branches and professions, while Finland has 79,000 (3.5%).

According to studies by the European Commission, 7.2 million people in the EU were working in the cultural sector in 2001.²⁵ The annual growth in employment in the EU cultural sector was 2.1% over the period 1995-1999. Structural growth within the cultural sector was at its most vigorous in jobs (annual growth of 4.8%) in creative production (content creation) and lower in other tasks (technical and administrative). The mobility of labour in the cultural sector is also a shade higher than average in the cultural sector.

The economic impact of cultural production in Finland¹⁸²

Growth in competitiveness is expected to develop on the basis of strong clusters. Largest growth expectations in Finland are in the telecommunications, environmental and wellbeing sectors. The telecommunications cluster is expected to grow 15% annually until 2010, and the wellbeing and environmental clusters by 10% a year. Employment and competitiveness are expected to depend more and more on SMEs, but according to comparative studies, Finland does not have enough entrepreneurs or SMEs. Of the people who have university degrees, fewer firms are started up in Finland by people with degrees in business administration and more are started up by people with degrees in the arts and cultural sector.⁷

New estimates have been put forward for the impact of cultural production on the national economy, but calculating the contribution of culture to GDP is hedged in by a complex mass of varying indicators, definitions and demarcation agreements. GDP can be calculated in three different ways: according to production, demand or income. In accounting for the Finnish national economy, value-added calculations are performed primarily through production calculations. The contribution of culture to GDP is calculated in the United Kingdom and New Zealand. In Finland, the calculation of the contribution that culture makes to GDP has been the subject of considerable thought by Aku Alanen of Statistics Finland.

According to the register of businesses held by Statistics Finland, in 2002 there were 14,263 firms operating in the cultural sector in Finland, making up over 6% of all companies. This figure includes branches connected with the arts and artists' activities, the media, design, advertising, electronic entertainment and various leisure services. Most cultural firms come under the heading 'architectural and industrial design and art'. The largest individual branch was advertising.

In the same year, 2002, cultural enterprises contributed EUR 11.7 billion to the total turnover of all enterprises, or 4.3%. Cultural enterprises are

smaller than average in terms of both staff numbers and turnover. In 2002, they employed on average 4.6 staff (as against 5.8 for all enterprises) and their average turnover was EUR 0.8 million (EUR 1.2 million for all enterprises).

The media market in Finland was worth EUR 3.6 billion in 2002.²⁶ Over the last few years, annual growth in the volume of the media market has been around 4-5%. In 2002, the printed media, i.e. magazines and newspapers, books and printed products accounted for EUR 2.6 billion of the media market, or 72%. The electronic media, i.e. radio and television and Internet services, accounted for EUR 0.7 billion and the recording sector, i.e. sound recordings, videos, CD-ROMs and cinema ticket sales accounted for EUR 0.3 billion.

In 2001, the experience industry had 30,700 outlets in Finland employing a total of almost 143,400 staff. These outlets can be broken down as follows: travel 43%, new media 19%, design 23%, entertainment industry 15%. During the period 1993-2000, outlets in the experience industry increased by 33.7%. According to the rising trend, these outlets will continue to increase at an annual rate of around 3-5% for the years 2002-2006. Over the same period the number of staff is expected to grow at an annual rate of 2-4%. Turnover for the whole experience industry in Finland in 2001 was EUR 16.2 billion and growth on the previous year was 4.8%. Turnover is expected to grow at an annual rate of around 4-6% during the period 2002-2006, although the forecast seems to be more favourable than the reality due to changes in the way statistics are gathered.

According to the estimate in the Ministry of Labour report *Työvoima 2020*, employment is going to go down in all industrial sectors in Finland and in agriculture and forestry. Growing professional groups will be care, management and expertise in production and administration, plus teaching and culture.²⁷

The cultural sector is strongly labour-intensive. The most recent year for which data on professions and business sectors are available from population counts and the employment statistics produced by Statistics Finland is 2000. In that year, almost

115,000 people in Finland, or 5.1% of the working population, were employed in the cultural sector and the cultural professions. By international standards, this figure is top class. Generally speaking, the proportion of the working population engaged in the cultural sector in different countries is thought to be around 2-4% of the working population. This figure has not been arrived at by giving an exceptionally broad definition of the cultural sector, but the data is largely comparable in international terms. Those who are engaged in the cultural sector as a secondary occupation, cultural staff who were out of work during the relevant period and voluntary workers in the cultural sector have not been included within the scope of the definition.²⁸

In 2000, a total of 65,760 people were working in the cultural professions. Of these, two-thirds were working in the cultural sector and one-third in other sectors. The number of people working in the cultural professions had grown by roughly ten thousand since 1995.

Studies have shown that in the culture industry, the artist is the tip of the iceberg. The arts, design and crafts make up only 15% of the labour force in the cultural sector. The multiplier effects of cultural events, arising from accommodation, travel and restaurant services, are not included in the effects of the cultural sector on employment. Estimates of the size of the cultural economy are usually based on the fact that there are core cultural sectors and, on the periphery, there are other sectors that support culture and other creative sectors.

In 2000, almost 90,000 people were working in the cultural sector as a whole and the number of staff in the cultural sector has grown steadily over a number of years. Since 1995, growth has totalled around 15,000 people, or 19%. The size of the labour force has developed in different ways in different branches. For example, in cinema and video production and distribution, growth was significantly higher than average (72%), likewise in advertising (78%) and in architectural and artistic design and the arts (61%). On the other hand, the majority of those working in the public sector, in libraries, archives and museums, have each

remained at more or less the same level. Educational standards in the cultural sector are average for the work force as a whole.

In 2000, 56% of those employed in the cultural sector lived in the Province of Southern Finland, a slightly higher proportion than the percentage of the employed work force (44%). In all the other provinces in Finland, the proportion of those working in the cultural sector was smaller than the percentage of the employed work force living there.

According to Statistics Finland's studies on foreign trade, the income of enterprises in the cultural sector and the media from the export of services totalled EUR 50 million in 2002 (see appendix). The sector with the biggest income from exports of services was advertising (EUR 28.7 million), followed by magazine publishing (EUR 5.2 million), newspaper publishing (EUR 4.4 million), radio and television (EUR 4.5 million), and architectural services (EUR 3.1 million). According to studies on foreign trade in services, the value of exports of services associated with culture and the media grew by several million euros between 2000 and 2002.

According to National Board of Customs statistics, more goods were imported to Finland than were exported from Finland in almost all categories of cultural commodities. Only in books, magazines and other printed products was the balance of trade in favour of exports. The value of cultural commodity exports in 2000 was FIM 3.0 billion and the value of imports was FIM 4.4 billion. Large annual fluctuations are typical in the import and export of cultural commodities.

The impact of copyright on the national economy has been studied since the 1980s in more than ten countries. In Finland, economic studies of copyright were carried out in 1991 and 2000, based on data from 1988 and 1997.

The economic importance of copyright has become an aspect of intergovernmental cooperation. Based on a Finnish initiative, the World Intellectual Property Organization (WIPO), has begun to develop a uniform international research method for economic studies on copyright, and in late 2003, the WIPO secretariat published a handbook on

research and research methods.

The idea is that using a uniform research method will provide uniform and comparable figures for the economic importance of copyright in different countries. WIPO also intends to carry out pilot studies in countries where the copyright economy has not yet been studied at all.

Works that are protected by copyright have a different impact and different importance in different sectors of the economy. In studies of the copyright economy, the fields examined are divided into three categories according to their main characteristics:

1. Key copyright fields (fields that would not exist without copyright and which focus on the creation, production and distribution of material protected by copyright and related rights).
2. Fields that are dependent on copyright (the equipment industry, which produces machines, equipment and instruments used in the production, distribution and consumption of works protected by copyright).
3. Other fields on which copyright has an impact (e.g. the furniture and clothing industries).

The study carried out in Finland in 2000 focused on the first two categories; the third category is of minor importance and difficult to study. The study showed that added value had grown considerably in the fields that are dependent on copyright. The total added value of key copyright fields, i.e. fields producing material protected by copyright, rose during the period 1988 to 1997 by 41% to become 4.13% of GDP in 1997. The copyright field that had grown most was the software industry. Core copyright fields employed 3.98% of the work force, or 86,000 people. Annual economic growth was 8.3%, whereas in other fields, growth was 4.05%.

In fields dependent on copyright, i.e. the equipment industry producing the machines, equipment and instruments used in the production, distribution and consumption of works protected by copyright, the total added value was 0.92% of GDP and the number of people employed

amounted to 0.66% of the work force.

The overall impact of the copyright fields, i.e. key copyright fields plus fields dependent on copyright was 5.05% of GDP. In reality, the figure is larger than this because the production and use of works in the public sector, for instance, was not included in the study.

Looked at as an indicator of economic growth, the copyright fields in Finland show up extremely well in comparison with other countries. According to studies carried out in the 1990s, the added value of copyright in Finland in relation to GDP was second only to the Netherlands. The added value of copyright in Austria, the UK and Norway at least, fell below Finland's level.

Comparison of research results in different countries is complicated by the different methods used in the studies and the lack of research data for the same years. Using research data on a worldwide basis calls for international cooperation to ensure that research activities are carried out regularly and in a uniform manner.

In 2000, the European Union also commissioned a study of the impact of copyright on the economy of Europe; the report on this study is available from the European Commission.²⁹

Intellectual property and cultural exports

Legislation on intellectual property and the international agreement system together form an important basis for culture, cultural production, international exchange and the information economy.

Copyright is a basic requirement for making use of cultural and scientific content production and products. The opportunity for the author of a piece of creative work to gain financial benefit from the results of his work is based on copyright. Economic rights ensure that the author has bargaining power when it comes to utilising the products of creative work. Copyright encourages creativity and supports the utilisation of creativity in concrete form.

International agreements

Copyright is covered by national legislation. Finnish national copyright legislation is applied to protected works produced in Finland. Works produced in other countries also have copyright protection in Finland on the basis of international agreements and provisions on the international application of the law.

Copyright is an international form of protection governed by international conventions. Furthermore, national protection systems are harmonized by conventions. The main international agreement on copyright is the 1886 Berne Convention for the Protection of Literary and Artistic Works. The Berne Convention has subsequently been revised and updated on seven occasions. A total of 151 countries have signed the convention, Finland doing so in 1928. International protection for related rights is covered by the protection for artists, those making sound recordings and radio companies set out in the Rome Convention in 1961. A total of 76 countries have signed the Rome Convention, Finland doing so in 1983.

The system of international agreements in the copyright field was supplemented in 1996 by the WIPO Copyright Treaty and the WIPO Performances and Phonograms Treaty (WPPT). The new treaties clarify and supplement rights associated with transmission through data networks and contain added provisions on international obligations on technical methods of protection and administrative information on rights. Finland intends to sign these WIPO treaties along with the other EU Member States once national legislation in the Member States has been harmonized with Community legislation based on the treaties.

The provisions of treaties on copyright and industrial property rights, such as patents and trademarks, are also included in trade policy agreements. In 1995, the TRIPS Agreement, which is an annex to the agreement establishing the World Trade Organization (WTO), came into force. This looks at industrial property rights and copyright from the point of view of trade and, as an

instrument of trade policy, strengthens worldwide protection of industrial property rights and copyright. As far as copyright is concerned, the agreement contains provisions on a number of things including protection for performers, those making sound recordings and public radio corporations. The agreement also contains provisions on asserting rights and on resolving disputes, if the member countries do not fulfil their obligations under the agreement.

The European Union

The progress of European integration in the last decade of the twentieth century and the first decade of the twenty-first has been the most important factor for change in copyright legislation. Until the early 1990s, amendments were mainly made in copyright legislation when called for by national requirements. Along with membership of the EU, the focus in drawing up legislation has shifted to the drawing up of community legislation.

So far, a total of eight directives in the copyright field have been issued by the EU: the Software Directive (1991), the Rental Directive (1992), the Satellite and Cable Directive (1993), the Term Directive (1993), the Database Directive (1996), the Copyright Directive (2001), the Artist's Resale Rights Directive (2001) and the Enforcement Directive (2004).

The directives are given legal force in the Member States through amendments to national legislation.

Copyright legislation in Finland

Finland's Copyright Act dates from 1961. This Act and the subsequent twenty or so amendments to it are based on joint Nordic preparatory work. Many of the key provisions have the same content throughout the Nordic countries.

Literary and artistic works are subject to copyright. Computer software may also acquire copyright protection as a literary work. Any work

which exceeds the threshold for a work of art acquires copyright protection. A work that acquires protection is the original result of the creative work of its author. Copyright protection is acquired automatically and is in force for the duration of the author's life and for 70 years after his death.

Copyright does not protect topics, ideas, methods, concepts, algorithms, principles, information content, data, plots, or inventions. Copyright protects the work in the form in which it is produced.

Copyright gives the author both financial rights and personal rights. According to the basic provisions on financial rights, the author has the sole right to control the production of copies of the work and to make the work available to the public in any way whatsoever.

The moral rights of the author include the right to be known as the author of the work and a ban on altering the work or making it available to the public in a way that would be injurious to the author.

Copyright is limited by legislation, when a work is used for educational and other purposes that are important to society and for other practical reasons. For example, on the basis of copyright limitation, quotations may be taken from a work or the whole work may be used for educational purposes according to the provisions of the law. Producing copies of the work for private use is also based on the provisions on copyright limitation in the law.

Copyright legislation also contains provisions on certain other rights that are related to copyright. The most important of these, known as neighbouring rights or related rights, are the rights of artists, producers of sound recordings, producers of image recordings, radio and television companies, photographers and those who compile databases and catalogues. The duration of protection for related rights is 50 years, counted from the year in which the performance, recording, publication, or broadcast is made or made available to the public.

As far as related rights are concerned, the subject of protection is not the work, but some other presentation of it: performance, sound recording, image recording, radio or television broadcast signal,

photograph, catalogue or database which has specific protection. The protection given by related rights is similar to copyright, but in certain circumstances it is more limited than copyright. In some cases, a right to compensation is provided for in place of sole rights.

An infringement of copyright can be punished under section 49, subsection 1 of the Penal Code, or as a violation of copyright under the Copyright Act.

The Government Bill containing the amendments called for by the Copyright Directive (HE 28/2004 vp) was put before Parliament in March 2004. The Bill on copyright legislation has been tailored to meet the demands of the information society and to secure the rights of the author of a creative work in a changing environment.

The Bill includes a ban on the circumvention of any technical protection on the work and on distributing tools that enable this to be done, as called for by the Directive. There is also a ban on removing or altering any electronic rights-management information.

The importance of the copyright sector in cultural exports

Financial exploitation of the products of creative work is based on copyright. The holder of copyright or related rights has the power to control the utilization of the results of his work and grant licences to use protected material. User licences may be limited geographically, temporally, or in other ways.

Digital technology and information networks have made material easier to use and more readily available. However, at the same time they have given rise to new instances of copyright infringement. In the information technology environment, infringements can occur more easily than before. The fact that information networks and the websites created for the computers linked with them are mainly in the public domain, is easily forgotten.

Sorting out copyright infringements in the information network environment sets new requirements for legislation and for the investigating authorities. More and more often such crimes have links with several countries.

The piracy arising from peer networks and other channels used for passing on protected material is a problem which calls for cooperation between the holders of rights and the authorities at the national and the international level.

Balanced and secure development of the networked information society calls for national legislation in different countries to be adequately harmonized. The overhaul of the international convention system that is currently under way is aimed at achieving a uniform level of protection in all the key sub-sectors of copyright and related rights.

Industrial property rights as a buttress for cultural exports

Apart from copyright, the other main area of intellectual property rights consists of industrial property rights (trademarks, models, patents, etc). In contrast with copyright, these forms of protection call for an application to the authorities and registration. For example, a patent may be granted on application for an invention that can be used in industry. By paying an annual fee, a patent can be kept in force for twenty years.

In addition to copyright, cultural products may be subject to some other form of intellectual property right. A product protected by copyright might be a registered trademark, for example; certain versions of a work might be registered models. Patent protection may apply to a computer program that is part of an invention, but cannot be patented separately.

Intellectual property is also deemed to include protection against unfair business practices. According to the provisions of the Unfair Business Practices Act, the use of practices that are contrary to good practice or unfair to competitors in any other way is prohibited.

In cultural production, different forms of protection can be applied in tandem, independently of each other. When it comes to concepts, formats or perhaps the sale of cultural services, elements that are protected by copyright may be included in production or some aspect of production, but they may also be subject to some other intellectual property right at the same time. Cultural production and the forms of protection applied to it can thus be assessed from the business angle.

Intellectual property as a requirement for production and exports

Intellectual property forms the backbone for the production of cultural products and services and for international trade in them. It is possible to export cultural products if, at the production stage, the producer of the material acquires either the necessary rights or the complete rights to the exploitation of the product and therefore the right to export it.

The price obtained for cultural products is based wholly or partly on copyright. For example, showing a film in a cinema, or broadcasting it on television, and selling and renting videos or DVDs of films is based on the utilization of copyright.

Contractual activity related to the export of products is also based on copyright. Agreements can be based on various contractual mechanisms depending on whether it is a matter of goods or services. A product that is offered for sale as goods is subject to copyright as provided in the law. An agreement may also cover trading in user rights.

What is essential is that any agreement concerning products or services, for example a licence agreement, should contain clear terms about the status of the distribution and use stages of the products or services.

Using rights to their best advantage calls not only for sufficient expertise, but also for corporate intellectual property and the formation of a clear corporate strategy or operating model for making

the most of it. The enterprise has to have sufficient expertise at the production stage; it has to know what rights it needs to acquire and how to acquire them. The enterprise also has to have a clear strategy about the conditions under which it is prepared to licence its products or services.

The conditions of the export country have to be understood sufficiently clearly. When entering into agreements it is important to know something about the special aspects of the legal system that relate particularly to the product category in question.

When entering into export contracts and other licensing agreements, an enterprise has to know how to keep the rights in its own hands. Ensuring that a product has adequate legal protection in the markets of the country to which it is being exported is also an important sub-sector of an enterprise's intellectual property strategy. The enterprise must be able to intercede when it comes to illegal use and other infringements of rights.¹⁶⁵

Business operations in the cultural sector

The revenue generation model

A 'business model' is a practical plan for implementing a company's strategy, aimed at a specific market. In other words, it is a concrete and detailed description of the way the company works. The expression 'business model' is used to mean a company's product, service, information and income flows, its positioning in the value network and a description of the benefits and sources of income of the various parties involved. A business model also covers the company's revenue generation model (who pays what to whom, why and on what terms), customers, product development and the role it plays, markets plus marketing, sales and distribution channels, partners, financing and products. Evolving a successful business model calls for systematic perception, analysis and development of all the sub-sectors of business.

The various branches of creative production

operate on different business models and different revenue generation models. The product may be differentiated into a number of channels in order to exploit the brand and often to market products that depend on the same concept but are independent of each other.

Content can be reproduced in the new media and it is often similar in all media. However, the revenue generation model is specific to a specific medium. A content package can be designed for a multimedia environment right from the start. As far as making a success of content products is concerned, the trend is towards exploiting their multimedia potential. For example, business packages can be built around books that include films, TV series, videos, sound recordings, games, clothes, etc.

- Multimedia is used to mean exploiting several channels to distribute specific content instead of the traditional (single) channel. The multimedia concept is closely linked with telecommunications, the media and the convergence of information technology. From a technical point of view, content can be distributed and consumed more freely than before, using different distribution channels.
- In multi-platform operations, the same content is adapted and turned into products in different environments.
- In multi-channel operations, the content is turned into slightly different products in similar environments.
- Cross-branding means the mixed use of the same content in several different media.
- A life-cycle model of creative production illustrates the sales volume accrued over time. The life-cycle model can be used at different stages of business, or in analysing the development of a specific product.

Business models for content production:

1. Product development models show the critical elements of product development and the parties contributing to operations.
2. Developing content and technology in tandem; implementing the idea of the content product calls for technical development.
3. Subcontracting content development and technological development; at the production stage, the company does not do the technical development work but typically uses several technologies in content development, and these are acquired from subcontractors.
4. Outsourcing product development; the company does not carry out product development work as far as content production is concerned.
5. Consumer-led content development; content produced by the user.
6. Revenue generation models; income from ticket sales and licensing (spin-offs), project funding, advertising revenue, distribution of profits, commission fees, hybrids.
7. Distribution channel model; direct/indirect distribution to corporate customers/consumers.
8. Multimedia model; undifferentiated content in more than one medium; content package built up on more than one medium; differentiated content product in several media.³⁰

Product development in the arts and culture often operates in long-term cycles. For example, the success of classical music in Finland is not a 'miracle', it is based on long-term development of the classical music education system, which began in the 1960s as a reflection of political will. There is thus a 40-year cycle in classical music, which has emerged from the best training system in the world, which has resulted in top-class international success.

The risks in the arts and cultural sector can be very great and the results of a short-term cycle may not be sustainable in terms of quality. The problem is how the innovation and funding systems can recognise a successful product. For instance, Tove Janson would scarcely have been able to secure funding in the 1940s on the basis of her first

scrappy Moomin drawing, even had she been able to say that in 50 years' time it would be a successful concept of international proportions. Business models are not broad-based and ready-to-use right from the start; the concept has to be developed through interaction with the public.

The Moomin concept began to be developed in the late 1940s. The books began to be translated and a strip cartoon was started, while the cartoon film series did not emerge until the 1980s. Prior to incorporation in 1979, there were 30-40 licence agreements in existence; major growth in the number of licences began in the 1990s. Now Moomin Characters Oy believe the trademark has reached saturation point in terms of licence agreements, even though new agreements have still been made in the twenty-first century.

The first version of *Max Payne* for PCs was published in the USA in July 2001 and the console versions came out in December 2001. In Europe they were not published until 2002. The aim is to build the concept into a strong brand, but development work is still in its infancy; the lifecycle of the brand may turn out to be a long one and it may expand into cartoons, for example.

Creative environments

Creative ability is a characteristic that people are born with, but it is easier for a person to use their creative ability in a creative environment. Creative environments are characteristically interactive, playful and experimental, and provide peer support.

The 'Creative City' concept emerged in the second half of the 1990s along with developments in information technology. The idea behind the concept is to combine and integrate advanced technology with creativity in the artistic, scientific and methodology fields. The Creative Cities network has expanded to become a global concept and worldwide operating model. The concept has given rise to new combinations of technological innovation and cultural enterprise in the fields of art, culture, entertainment, travel and the digital

media. One hallmark of a creative environment is the opportunity for exchanging meaning and experimentation with new combinations.

Creativity is not something that can be generated, but channels for creativity can be opened by using business methods to construct creative environments, or creative industry clusters. These might consist of cultural technology parks, centres of expertise and business incubators for cultural production. A good example of a cultural technology park in Finland is the Cable Factory in Helsinki. A decision has just been made in the city of Hämeenlinna to implement the Verkatehdas cultural centre project.

Business incubators have been shown to be efficient ways of generating business activity. Studies suggest that business incubators have produced several hundred firms that have continued to be active, though in the cultural sector, the risks involved and the chances of success are difficult to predict. For example, businesses that have emerged from the Arabus business incubator for the cultural sector at Arabianranta have survived well compared with other cultural sector business incubators in the province of Uusimaa or even abroad. On the other hand, one of the enterprises that has gone out of business was chosen by the magazine *Bisnes.fi* as one of the 50 most promising firms in Finland.³¹ This amply demonstrates how difficult it is in reality to know with any degree of certainty whether or not a company is going to be a success. In cultural production, the risks are enormous.

Distribution of firms emerging from business incubators

	Active businesses
New Business Center	78
Otaniemi	86
Arabus	77
Innosampo	56
Länsi-Uudenmaa business incubator	74
TwinBic	44
Amiedu	42
NYP	67
Social and health sector business incubator	61

One of the aims of the nationwide Centre of Expertise Programme is to focus local, regional and national resources on the development of selected, internationally competitive areas of expertise. In the future the centres of expertise will be more attractive investment targets for international as well as Finnish companies and investors. Inclusion in the programme calls for clusters of top-level international expertise, innovativeness in programme measures, impact and efficient organization. During the second programme period, 2003-2006, the emphasis is on putting expertise to use and on corporate impact. In selecting the new centres of expertise, other areas of expertise besides those based on technology have been taken into account.

The following centres of expertise are included in the Centre of Expertise Programme for the cultural sector: the Uusimaa Centre of Expertise (Culminatium Ltd), which covers the digital media and content sectors; the Kuhmo Chamber Music Centre of Expertise (Virtuosi/Pro Kuhmo Oy); the Lapland Centre of Expertise for the Experience Industry (Lapin Elämystuotanto Oy); the Päijät-Häme Centre of Expertise (Neopoli Oy), which covers design; the Varsinais-Suomi Centre of Expertise (Oy DataCity Center Ab), in which cultural production is represented by the Kulturo

Centre of Expertise Programme. Cultural tourism is also linked with MOSKE, the Centre of Expertise for Tourism, which is a networked centre of expertise. Partnerships with and exports of Sámi culture are associated with the Resource Centre for the Rights of Indigenous Peoples, which was set up by order of the Norwegian Government in 2002. The Centre's office is located in Guovdageaidnuss-Kautokeino.

Business in partnership with culture

Sponsorship and marketing consultants Image Match define sponsorship as investing in an activity which is perceived as being generally beneficial or positive, in order to develop that activity and exploit the commercial value attached to it.

As the demand for corporate social responsibility increases, sponsorship has become more attractive in that it is perceived as promoting shared goals, but at the same time, the sponsor seeks to utilize the commercial value generated by sponsorship.

Sponsorship has been growing steadily since the end of the 70s in Finland as in other countries. It has developed into a business activity of its own and is no longer seen as charitable work which produces no return, but as a commercial activity

through which companies seek rights and benefits.

Business support for art institutions in EU Member States has been running at about 1-5%. There is no comprehensive material that can be used for comparing the figures, but a number of national comparisons have shown that companies contribute around 2-4% of the arts sector's total costs. Sponsorship is most widespread in the United Kingdom.

According to the Sponsorship Barometer of the Association of Finnish Advertisers, research by Pekka Oesch and a study on business support for the arts and culture by Risto Ruohonen, the total volume of sponsorship in Finland in 2000 was about FIM 350-400 million, of which FIM 60 million was spent on culture.¹³¹

In many European countries, there is a tradition of partnership between business and culture, and they have organizations and networks that promote sponsorship. In the United States, the first organization promoting cooperation between business and culture was founded in the 1960s, and in England and France in the 1970s. In England, arts and business activity is also supported by the Government.

The Arts and Business Forum Finland project (ABFI) that is currently under way, aims to initiate cooperation between the public and private sector to promote the arts, business and culture.

Supporting cultural exports

At governmental level cultural exports come within the purview of three ministries: the Ministry of Education, the Ministry of Trade and Industry and the Ministry for Foreign Affairs.

According to the division of labour among the ministries, the Ministry of Education is responsible for the initial stage of the value chain, in other words, for providing the preconditions for creative production and cultural production.

This incorporates general education, basic art education, polytechnic and university education and research in various creative sectors. The ministry's purview also includes maintenance of the cultural infrastructure and of art and cultural institutions. Moreover, the ministry promotes international contacts and networking in the creative sectors while disseminating information and promoting the cultural sector. As the ministry responsible for public diplomacy, the Ministry for Foreign Affairs promotes and supports communication and networking in the arts and culture while the Ministry of Trade and Industry supports and promotes product development, business and exports in the creative economy and cultural production.

The report shows that what the cultural exporters saw as weakness in the field was the insufficient coordination of administration and infrastructure and the bureaucracy of project financing. Another

problem is that the subsidies are allocated for one budget year at a time, which may adversely affect long-term commitment to international operations and major international cultural export efforts, such as art and cultural fairs.

It is important that a strategy is created for the proposed cross-ministerial cooperation body which will have a uniform vision and commitment as regards the promotion of cultural production and exports and common criteria which aim at the effectiveness of the entire value chain. Currently, the Ministry of Education subsidizes 'unprofitable' art, while the Ministry of Trade and Industry requires commercial success for its support. The areas which are being jointly developed are in applied research and product development, and in the information, marketing and promotion interface.

In the promotion of cultural exports, support for networking, employee exchange programmes and travel costs is required not only by artists and traditional cultural actors but by other parties involved in cultural exports: curators, managers, producers and companies. They too should be given the opportunity to work abroad at a foreign art institute or production organization for a fixed period. Correspondingly foreign experts should be invited to Finland on 'employees in residence' programmes.

The ministries responsible for cultural exports

should extend their collaboration to enhance cooperation among their subordinate institutes and organizations, for example, by creating joint operating networks at all levels among the institutes, information centres, embassies, Finpro and Tekes.

The following describes the duties and operating methods of each ministry in the field of cultural exports.

Ministry of Education

In 1997-1999, the Ministry of Education completed its Cultural Industry project which explored the prospects for cultural production. In 2000-2003, the ministry carried out a broadly-based Content Creation Initiative, which examined the development of digital study material, information services and content production, as well as the provision of cultural and nature travel services online, the digitisation of national cultural heritage, content creation in sport and copyrights.

In accordance with the Ministry of Education working order, the Department for Education and Science Policy and the Department for Cultural, Sport and Youth Policy are each responsible for international affairs within their own purview.

The role of the Secretariat for International Affairs is to coordinate general international and EU affairs within the ministry. The Secretariat for International Affairs handles some aspects of international affairs in the field of culture, prepares bilateral cultural exchange programmes and decides on their financing. The Secretariat also grants subsidies for international operations in the arts and culture. The preparation of subsidy criteria is currently under way.

The Ministry of Education is responsible for the national preparation of education, culture and youth policy and partly for the preparation of research affairs and takes part in their processing in the EU councils on education, research, culture and audiovisual policy, and youth. With the help of EU structural funds; the Ministry subsidizes projects related to regional education, research and culture.

The national budget has a section dedicated to international cooperation within the purview of the Ministry of Education. It is divided into the following items (subsidies EUR 2004):

Operating expenses of the Finnish Institute for Russian and East European Studies	787,000
International cultural cooperation	6,984,000
Certain subsidies	5,362,000
Allocations for international organizations	2,287,000

Role of the Ministry of Education in European Community initiative programmes

The EU Structural Fund measures are included in the following Ministry of Education strategies for education and cultural policy:

1. Developing cooperation in education and working life, funding ESF and ERDF,
2. Lifelong learning, funding ESF,
3. ICT in education, funding ESF and ERDF,
4. Bringing the numbers of those with electronics and information technology qualifications into line with the requirements of the labour market, funding ESF,
5. Targeting research resources so as to improve the national innovation system for the benefit of the economy, business and employment, funding ESF, ERDF,
6. Securing the national cultural identity and basic services for arts and sport, funding ERDF,
7. Promoting the development of the cultural information society, funding ERDF.

In addition to the national objective programmes, a number of Community initiative programmes will be launched in 2000-2006 in the EU to boost transnational, cross-border and inter-regional cooperation. The programmes underscore the

importance of internationalism, innovativeness and dissemination of good practices. The Community initiative programmes focus on the development of border regions, the development of urban areas, prevention of exclusion and inequality and overall development of the countryside.

International cooperation organizations

The most important international cooperation organizations in whose work the ministry participates are the Council of Europe, the World Intellectual Property Organization (WIPO), the Organization for Economic Cooperation and Development (OECD) and the UN Educational, Scientific and Cultural Organization (Unesco). The Ministry of Education has also been active in the establishment and work of the World Antidoping Agency (WADA).

Nordic cooperation focuses on culture, education and research in the Nordic Council of Ministers and its subordinate bodies and the Nordic Cultural Fund. From the point of view of culture, the main actors are the Council of the Baltic Sea States (CBSS) and the Barents Regional Culture Committee.

The Ministry of Education takes part in the work of the Council of Europe committees on education, higher education, research, culture and cultural heritage, and the operations of the executive committees for sport, youth and the media.

From the point of view of the purview of the Ministry of Education, important UN organizations include UNESCO and WIPO. The Ministry is responsible for the Secretariat of the Finnish National Commission for Unesco. Finland has a permanent Mission to Unesco in Paris.

Bilateral cooperation

Finland has concluded bilateral cultural agreements with 39 countries. The agreements are intergovernmental agreements in the Ministry's administrative purview, i.e. education and training,

science and research, art, cultural heritage, libraries and archives, non-governmental organizations, cultural institutes, sport and youth. In practice the agreements are implemented through cultural exchange programmes, generally taking up 3-4 years.

In addition, the Ministry supports three publications intended for international distribution, i.e. Books from Finland, Form Function Finland and the Finnish Music Quarterly, each representing their own branch of Finnish cultural life (literature, design and architecture, music).

International operations of the Department for Culture, Sport and Youth Policy

The Ministry's sphere of authority in cultural policy covers the arts councils, the national cultural and art institutes, government subsidized museums, theatres and orchestras, municipal libraries and other cultural activities, along with the activities of civic and other government subsidized organizations.

The aim of Finnish art and cultural policy is to promote national and international networking. In accordance with the Government Programme, Finland as a civilized society relies on skills, knowledge and creativity with a special focus on the position of artists and the cultural industry in the early part of the 21st century.

In culture, sport and youth policy, national operations, EU operations and other international operations are closely interwoven. Therefore, the funds allocated to cultural operating expenses will also benefit international operations. In addition, international operations receive subsidies from State betting and lottery funds, although the amounts of subsidies and percentage of cultural exports cannot be itemized.

The Ministry of Education supports corporations and institutes, which work in close cooperation with the Ministry and participate in cultural exchange in their own field and promote Finnish

culture abroad. Such partners include museums, art and cultural information centres and cultural export promotion organizations. The Ministry of Education also supports the teaching of Finnish for children of Finnish extraction living abroad in the Finnish Schools, the cultural and information projects of ex-patriots, fund-based cultural and science institutes operating abroad and the friendship societies in Finland.

From the point of view of cultural export promotion, the organization of international affairs at the Department for Culture, Sport and Youth Policy needs to be improved.

Offices and agencies under the Department for Culture, Sport and Youth Policy

The offices and agencies of the Department for Culture, Sport and Youth Policy of the Ministry of Education, i.e. the Arts Council of Finland, national arts councils, regional arts councils, the Library for the Visually Impaired, the National Board of Antiquities, the Finnish National Gallery, the Governing Body for Suomenlinna, the Finnish Film Archive, the State Office of Film Censorship and the State Board of Film Censorship, and the State Provincial Offices each handle international affairs in their own fields and within their competence.

International activities of arts councils

The Central Arts Council and the nationwide network of arts councils (national arts councils and regional arts councils) distribute grants and other forms of support for a wide range of international activities. With improved international mobility, networking, interaction and collaboration of artists and the arts community, arts administration has developed new forms of support to meet their needs. These include travel grants and residence subsidies for which the Central Arts Council has earmarked a total of EUR 470,000 for the current year.

Travel grants are aimed at covering the travel

costs of artists and other experts in art abroad. It is awarded for artistically significant projects or projects which are important from the point of view of the art form, and in which artists or other experts in the field actively represent Finland by performing, holding an exhibition, displaying their work or by lecturing. The Council receives about 700 applications annually, 220 of which are approved. These travel costs are incurred in a wide range of places all over the world.

Artists-in-residence programmes have become a popular trend in the art world over the past few years. In general terms, the concept refers to a longish working residency (a minimum of two months) by an artist in a professionally and culturally new environment, usually abroad. In 1997, the Central Arts Council completed a special development programme for artists-in-residence.

The following have been perceived as preconditions for a successful artist-in-residence programme: disengagement from the everyday environment and acceptance of a new and riskier life situation, an intensive period with other, often foreign artists, interaction with different forms of art, a time, site and atmosphere that is conducive to work. In many residence programmes, the artist can complete a challenging project in an international artists' community.

On the other hand, foreign artists also stimulate the artistic and cultural life of their host locality in many ways. The fact that they work with local artists, teach in local educational institutes and other institutions, workshops, give work demonstrations and exhibit work make their stay a visible one. Visiting artists and their networks will also help the locality to integrate more easily into the international art community. The programme may also have more general significance in regional development.

The popularity of the artist-in-residence programmes in their present form began in the 1970s, when for example such programmes as the Künstlerhaus Bethanien in Berlin started. In the 1980s and '90s, arts and artists' centres oriented to receive visiting artists were founded in different parts of the world. In 1993, some twenty centres

founded Res Artis, the International Association for Residential Centres, which today covers a couple of hundred centres worldwide.

Artist-in-residence programmes in Finland began at the Nordic Art Centre (today the Nordic Institute for Contemporary Art NIFCA) studios. Activities have expanded to the extent that some twenty residential art centres now receive foreign artists in different parts of the country. These include Raumaras, with a focus on art galleries in Rauma, the Loviisa studio which invites visitors from the Baltic countries, the HIAP at the Cable Factory in Helsinki, which has a programme focusing on the artistic goal, the Ryyänänen studio in Koli and a guest studio in Inari. The Finnish Artists' Studio Foundation, which carries the main responsibility for information coordination in the field of arts and culture, together with the Central Arts Council, which is responsible for national coordination, began an artist exchange programme with Switzerland and Canada at the Tapiola guest studio in 1997.³²

The facilities for the artists' residential use are mostly financed by the municipality in which they are located and start-up funding has been available from the Central Arts Council which also grants residential subsidies for artists seeking international residence. The Council receives an average of 70 grant applications per year, about half of which have been approved.

The significance of the artist-in-residence programmes becomes clear from a CAI (computer-aided instruction) presentation and the Government Resolution on the arts and artists as outlined below:

The artist-in-residence programmes are an important mode of operations both for the artists and the individual localities involved and their development work. The operations and their development should therefore be seen as an important part of the support for the internationalization of Finnish art.³²

There are nine national arts councils in Finland: the National Council for Cinema, the National Council for Literature, the National Council for Visual Arts, the National Council for Design, the

National Council for Theatre, the National Council for Architecture, the National Council for Music, the National Council for Dance and the National Council for Photographic Art. The responsibilities of the National Councils include promotion of international interaction and raising the profile of Finnish art abroad. The National Councils have cultural export contacts in the various fields of art.

In addition, regional councils provide support for international art and cultural projects in their own regions taking part in artist-in-residence programmes and granting project and state subsidies. For example, Häme and Kaakkois-Suomi art councils have a residence in joint use in Barcelona. International activities are a natural element of neighbouring area cooperation, for example in the Barents Region and in Eastern Finland. Guiding Regional Artists often handle international contacts. International interaction and cultural exports are common at the regional level, for example jewellery design at South Carelia Polytechnic has produced a community of young artists which is actively involved in international operations both as individuals and groups.³³

People and expert exchange programmes

The Finnish Centre for International Mobility and Exchange Programmes (CIMO) comes under the Ministry of Education. Its responsibility is to advance internationalization within the Ministry sphere of authority through a variety of stipend and cooperation programmes financed by the Finnish Government, the European Union or the Nordic Council of Ministers. The aim is to increase mobility among certain groups of people and to generate new cooperation projects.

Finland has been a very active and successful participant in both EU and Nordic programmes. The number of projects and mobility figures has risen significantly. In 2003, 18,678 people moved into or out of Finland on a CIMO project.

Erasmus, which supports higher education studies, is the best-known EU programme arranged

by CIMO. It also incorporates student and teacher exchanges. Artistic fields, particularly the University of Art and Design Helsinki UIAH and the Sibelius Academy, have played an active role in the programme. The figures for university and polytechnic student exchanges are appended. Polytechnic statistics for each discipline are only available for 2003. Although the figures are small compared with the total exchange, they are significant in view of the size of the disciplines and the institutions. In addition to the Finns' enthusiasm for studying art abroad, attention should be paid to the considerable interest shown by foreigners in studying in Finland.

The mobility for studying and taking part in cooperation projects once studies are completed is extremely poor. There are plenty of small local actors in the field, whose budgets are so small that the financing of even a single trip may be impossible. CIMO proposes to launch a special people and expert exchange programme for cultural exports for the period 2006-2010. CIMO considers this proposal of primary importance for the advancement of cultural exports across the board.

Within the framework of CIMO's current operations there are several activities which promote cultural exports and which could with just a little extra support achieve visible results.

Some of these activities are given below:

Nuori Kulttuuri (Young Culture) travel grants

Young Culture trips are part of the more extensive Young Culture events programme. The Young Culture travel grant scheme supports performances abroad by groups of a minimum of three persons under the age of 29. Applications for the grants can be submitted once a year. The scheme is aimed primarily at groups which have performed in the programme either at regional or national level.

The grant is awarded to groups on the basis of their performance at Young Culture events and is part of the Cultural exports project. In accordance with the Cultural exports project principles a grant can be given to a group which acts as a cultural

ambassador both in Finland and abroad. The group is selected on the basis of an expert opinion (review) on the merits of the group at Young Culture events, the Young Culture committee's wide-ranging expertise in the area of culture and CIMO's expertise in internationalism and multiculturalism.

The Young Culture travel grant is designed to promote youth work with a focus on culture. A separate appropriation is reserved for the travel costs of a cultural ambassador group to perform abroad. Activities are developed in cooperation with the Young Culture committee.

Finnish language teaching at universities abroad

Finnish language teaching is provided at about 100 university departments round the world. CIMO sends teachers to about 30 departments and provides financial support for another 20 departments. In addition to teaching the Finnish language, the teachers' responsibility is to teach Finnish culture. CIMO supports departments materially by sending them magazines, books and films. In collaboration with the Finnish Literature Information Centre (FILI) CIMO arranged a joint cultural event on a trial basis at the University of Porto. A similar event on a larger scale is also being planned for Warsaw in autumn 2004. The event in Porto attracted large numbers of visitors and favourable media coverage. With little extra funds more such events could be arranged.

Work training at cultural institutes

CIMO has been subsidizing the employment of trainee workers by Finnish cultural institutes. The institutes have greatly appreciated this form of support and would like to use trainees more widely for the implementation of their events and themes. CIMO has also granted traineeship subsidies for foreign students of Finnish, especially for Finnish cultural events in the summer. This type of activity could easily be expanded to find competent temporary staff with good language skills.

CIMO:
Mobility in the arts 2002 and 2003

Universities

2002

	From Finland	To Finland
University of Lapland	35	46
University of Art and Design Helsinki UIAH	48	110
Sibelius Academy	50	34
Theater Academy	4	3
Academy of Fine Arts	14	13
Total	151	206

Mobility in all disciplines 3,807 3,784

2003

	From Finland	To Finland
University of Lapland	31	46
University of Art and Design Helsinki UIAH	57	133
Sibelius Academy	68	28
Theater Academy	14	3
Academy of Fine Arts	12	14
Total	182	224

Mobility in all disciplines 3,863 3,983

Mobility in culture 2003

Polytechnics

	From Finland	To Finland
Arcada	8	6
Diakonia Polytechnic	14	4
Espoo-Vantaa Institute of Technology	27	15
South Carelia Polytechnic	9	13
Häme Polytechnic	24	17
Helsinki Polytechnic	48	13
Humanities Polytechnic	28	6
Jyväskylä Polytechnic	8	4
Kemi-Tornio Polytechnic	1	1
Central Ostrobothnia Polytechnic	1	2
Kymenlaakso Polytechnic	28	21
Lahti Polytechnic	59	70
Laurea Polytechnic	2	0
Mikkeli Polytechnic	9	0
Oulu District Polytechnic	40	42
Pirkanmaa Polytechnic	7	2
North Carelia Polytechnic	8	9
Pohjois-Savo Polytechnic	32	16
Satakunta Polytechnic	5	2
Seinäjoki Polytechnic	20	2
Swedish Polytechnic	12	3
Tampere Polytechnic	36	19
Turku Polytechnic	43	16
Vaasa Polytechnic	34	23
Sydväst Polytechnic	15	4
Total	518	310

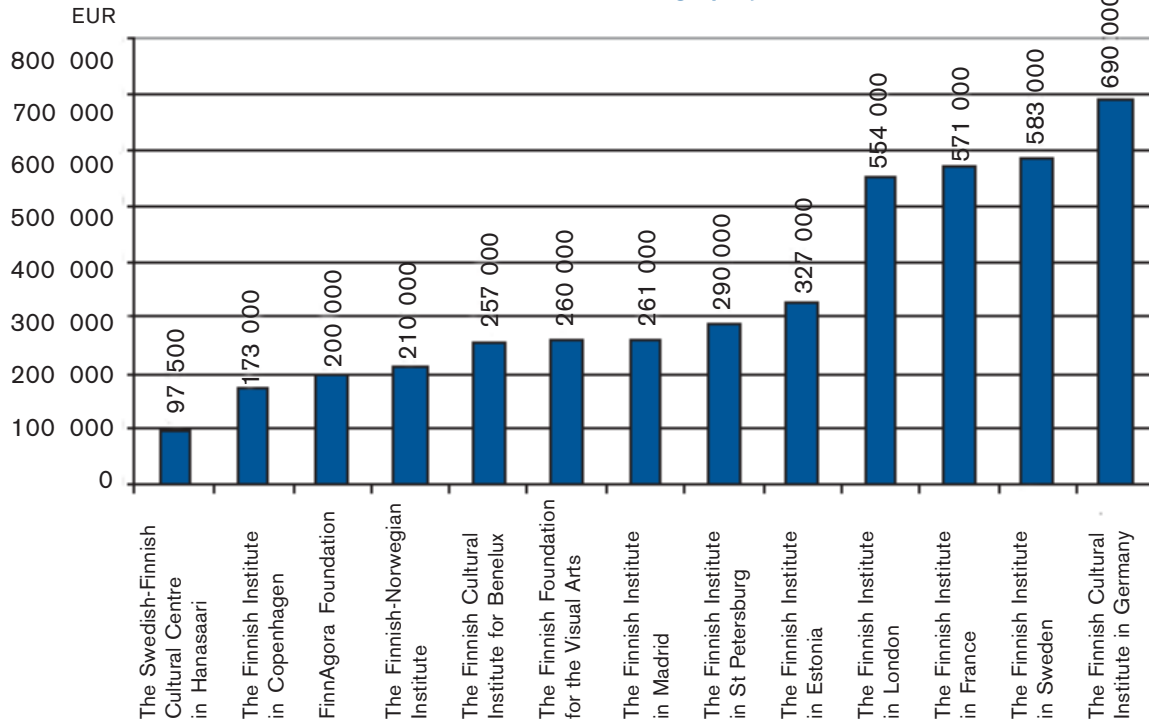
Mobility in all disciplines 3,692 3,863

134

Finnish cultural and scientific institutes as cultural exporters

Finland has a network of 16 cultural and scientific institutes abroad. The institutes focus on presenting different areas of Finnish culture, art, science and academic expertise in their respective country of operation and promoting research and teaching in their own fields. They are independent, foundation-based institutes with no central organization. They

State subsidies for cultural institute exchange projects, 2004



receive discretionary state aid from the government budget. The funding of cultural institutes is the responsibility of the Department for Cultural, Sport and Youth Policy of the Ministry of Education while the Department for Education and Science Policy funds the scientific institutes. In addition, the Secretariat for International Affairs grants the institutes special assistance for bilateral cultural exchange projects, other projects and direct costs.

Finland has cultural institutes in Paris (established in 1990), London (1991), Copenhagen (1992), Antwerp (1993), St Petersburg (1993), Tallinn and Tartu (1994), Berlin (1994), Stockholm (1995), Madrid (1996), Oslo (1996) and Budapest (FinnAgora, 2003). The Finnish Foundation for the Visual Arts (1989), based in New York, promotes the knowledge of Finnish culture especially in the field of the visual arts. Apart from these institutes outside Finland, the Swedish-Finnish Cultural Centre in Hanasaari, Espoo, in Finland (1975) promotes cultural exchange between Sweden and Finland. The institutes each have their own area of focus which

they seek to advance by organizing seminars, cultural events, exhibitions and discussion forums. They also conduct a varying number of scientific projects. In 2004, the assistance for the operations of the cultural institutes and cultural exchange projects will total EUR 4.5 million (See table).

The scientific institutes are based in Rome (1954), Athens (1984), Tokyo (1998) and the Middle East (1994). The Finnish Institute in the Middle East has offices in Damascus and Amman. The scientific institutes focus on the promotion of research and education but also arrange cultural programmes.

As cultural exporters the institutes operate somewhere between cultural exchange and exports. Their aim is to promote Finnish culture as extensively as possible in their respective countries with particular emphasis on expert audiences and to enhance cultural exchange and cooperation between Finland and their respective countries. The institutes organize cultural and arts programmes both independently and in cooperation with local actors and build contacts and partnerships between

actors in Finland and in their respective countries.

A joint Internet portal improves the visibility of the entire cultural institute network.

The aspects that the institutes consider important for cultural exports include networking, personal contacts and the high quality of the art and culture being exported, plus visibility in the country of posting.

Credibility, too, is important for the institutes. Independence is often thought to be better for credibility than a government basis. Vis-à-vis independence, the Finnish institutes differ from their counterparts in other countries, which are usually government based and directly subordinate to their Ministry for Foreign Affairs (e.g. France) or exercise government policy on an arm's length principle (e.g. United Kingdom).

Cultural institutes

The Finnish Cultural Institute for Benelux

The Finnish Cultural Institute for Benelux operates primarily in Belgium. The institute arranges exhibitions, concerts, meetings with writers, discussion forums, shows Finnish films and, in cooperation with the other Nordic countries, regularly organizes Nordic Scene events and supports co-projects by Finnish artists and artists from the Benelux countries. The institute also operates within CICEB, the association for national cultural institutes based in Belgium, which has plans to expand to become a joint representative for the whole of Europe on the other continents.

The Swedish-Finnish Cultural Centre in Hanasaari

The Swedish-Finnish Cultural Centre in Hanasaari promotes cultural exchange between Sweden and Finland. The centre holds seminars and courses aimed at professional groups and non-governmental organizations. For the general public, Hanasaari arranges a variety of cultural events, such as film festivals, meetings with writers, art exhibitions and activities for children. The heart of Hanasaari is the building itself, which serves both as a congress and an educational centre.

The Finnish Institute in Copenhagen

The aim of the Finnish Institute in Copenhagen is to provide the Danish market with new, up-to-date, high-quality Finnish art from a variety of fields. The institute's focus areas vary from modern art and music, dance and theatre, to modern photography and design and art forms that exploit new technology.

The Finnish Institute in London

The focus of the Finnish Institute in London is the United Kingdom and the Republic of Ireland. The institute's key target groups are the British, Irish and international professionals and opinion formers in the field of culture in these countries. The institute also focuses on young professionals and students of modern art and culture. The third group consists of members of the general public who are interested in Finland and related matters.

The aim of the institute is to launch, produce, support and market Finnish cultural projects. The Finnish Institute in London has named as its areas of focus all disciplines of modern art, the humanities and research, education and information.

In the projects carried out from 2000 to 2002, culture accounted for an average of 76%. The total number of projects completed in 1992-2002 was 553, of these 205 (37%) were cultural projects. In the early years of the institute's operations, the focus was on research and education projects. In 1996, the institute revised its operating strategy with a view to carrying out projects outside the house in partnership with local partners.

The visiting expert-exchange programme in culture launched in 2000 has increased the number of cultural projects. Every year, the institute arranges 20-25 individually tailored visits to Finland.

The Finnish-Norwegian Institute

The primary function of the Finnish-Norwegian Institute is to organize exhibitions in the institute's new facilities. Exhibitions are arranged for example in the visual arts, architecture and design. Small-scale lectures and intimate concerts are also held at

the institute's premises. In addition, the institute organizes events outside its own premises in collaboration with Norwegian parties. The cultural institute also collaborates with the Finnish Embassy and with some other Finnish parties in Norway with the aim of arranging high-profile events in different parts of the country at two-year intervals.

The Finnish Institute in Sweden

The Finnish Institute in Sweden promotes knowledge of Finnish culture in Sweden, Finnish and Finnish-Swedish literature, jazz, chamber and modern folk music. The institute supports orchestral visits and helps new Finnish modern art to acquire media coverage. The institute has its own art gallery. On one hand, the Swedish public shows an interest in Finnish 'exoticism' and 'madness' (despite the geographical closeness and shared history of the two countries) and on the other, in the new technology and new Finnish photography. The institute also houses a library with more than 10,000 Finnish books, CDs and video films, and Sweden's largest selection of Finnish-language magazines. In addition the institute collaborates with the Swedish radio (SR) which records several of the concerts held by the institute every year. The institute operates mainly in Stockholm. Most events are held in the institute's own premises which is gaining a reputation as a well-known cultural centre.

The Finnish Institute in Estonia

The areas of focus of the Finnish Institute in Estonia include showcasing the long cultural ties between Finland and Estonia, celebrating Finnish national festive days and promoting newer Finnish culture, particularly the visual arts, music and literature. Another focus of the institute is history. The institute also organizes further training for teachers in the Finnish language and Finnish culture. In addition to Estonia, the institute has visited and built a contact network with Latvia and Lithuania.

The Finnish Institute in St Petersburg

The Finnish Institute in St Petersburg concentrates on high-profile events in partnership with large-scale operators. Its primary aim is to serve specialists in Finnish art and culture. Geographically, the operations of the institute focus on St Petersburg, but touring exhibitions are also arranged to the surrounding areas and further afield. Some projects are carried out in Moscow.

The Finnish Institute in France

The areas of focus of the Finnish Institute in France are the visual arts, music and films. The aim is to become known as a Parisian cultural centre and to promote cooperation projects outside the house. The number of public functions arranged by the institute has grown from 78 events in 1998 to more than 250 in 2003. The number of bilateral and international cooperation projects in which the institute takes part outside the house has also increased in recent years.

The institute works with several international cultural centres in Paris (ECALIS) and collaborates with the joint umbrella organization for cultural centres (FICEP) comprising 30 countries. Other cooperation partners include the Nordic countries and Forum des Langues, an organization which seeks to promote languages and culture.

The Finnish Institute in Madrid

The Finnish Institute in Madrid promotes Finnish culture in the Spanish and Portuguese-speaking world. In practice the institute operates principally in Spain. It has agents in several Latin American countries and Portugal, where the agent has been most active. In addition, the institute collaborates closely with the Finnish embassies in Madrid and Lisbon. The institute also co-operates with other embassies in its area and the European cultural institutes in Madrid and Lisbon.

The Finnish Cultural Institute in Germany

The aim of the Finnish Cultural Institute in Germany is to diversify and modernize the image Finland projects in Germany. The institute's goal is to reach German political opinion formers,

decision-makers and specialists in different fields. Other target groups include the young professionals and students of Finnish culture and sciences and members of the general public who are interested in Finland.

In 1995-2003, the institute arranged altogether 851 public functions and 489 private functions: exhibitions, concerts, film screenings, literary events, and dance and theatre performances.

Finnagora

The mission of Finnagora, inaugurated in spring 2004 is to promote cultural exchange between Finland and Hungary and to act as a cooperation channel for culture, research, business and industry, friendship municipalities and grass-roots activities. In collaboration with Music Export Finland, Finnagora is launching a project to build a music network in Hungary in 2004.

The Finnish Foundation for the Visual Arts

The Finnish Foundation for the Visual Arts promotes the visibility of Finnish fine art, architecture and design in New York, elsewhere in the United States and Canada. The institute runs an artist-in-residence programme in which over 250 artists, designers and architects have taken part in the course of the institute's 14 years of operations. The institute arranges exhibitions that tour North America usually for 2-3 years at a time. As part of the programme the institute publishes related printed material and organizes seminars and discussion forums with experts and gives artists an opportunity to lecture in art institutions. The Finnish Foundation for the Visual Arts also maintains an archive of slides and portfolios of the work of Finnish artists, designers and architects, provides consultation services for Finnish and American parties in the arts, as well as for Finnish embassies and consulates in North America, and takes part in collaboration projects that represent Finnish art, design and architecture in North America.

The institute's target groups comprise both professionals and members of the general public within the field of the visual arts in North America.

In support of its operations and to access local and Finnish expertise, the institute has created an extensive cooperation network of art organizations and professionals.

Scientific institutes

The Finnish Institute in Japan

The Finnish Institute in Japan, based in Tokyo, promotes Finnish science, culture, business and higher education. The aim in all cultural activities has been to network with Japanese society and allow Japanese organizations and producers themselves to carry the main responsibility for importing Finnish cultural events to Japan. The institute's role is to act as an intermediary between Finnish and Japanese parties, less often to produce projects itself. Most of the institute's activities are business-to-business type work and not directed at the public at large.

The institute's method for networking cultural operators has been to arrange visiting programmes for Finnish specialists in the arts to meet colleagues in Japan. Specialist programmes have been arranged in the fields of photography, film, visual arts, music and modern dance. The visits have generated numerous cultural events in various fields in both Finland and Japan.

In 2003, the institute co-ordinated an extensive campaign on the subject of Finnish know-how, Feel Finland, comprising a total of 20 events in the fields of culture and science. Most of the cultural events derived from the specialist programmes arranged earlier. Altogether 160,000 visitors attended the Feel Finland events and it attracted a lot of media coverage in Japan. Generally, writing about Finland almost doubled in Japan in 2003. The institute also produced the campaign website which had over 100,000 visits during the year. In addition it published a flyer type brochure with 80,000 copies and a programme booklet with 30,000 copies and other printed material.

Since the institute was founded, media interest and the interest of the expert public in modern Finnish society and cultural expertise has increased.

The number of queries received by the institute has increased from 1,000-2,000 to 5,000 per year.¹⁶⁶

The Institutum Romanum Finlandiae

In addition to its devotion to science the Institutum Romanum Finlandiae is involved in the promotion of cultural relations between Finland and Italy. Most of the cultural events have been small-scale concerts and lectures which have been held at the institute's own premises. All the cultural activities have been arranged together with Amici di Villa Lante al Gianicolo, the institute's Italian partner organization. In addition, the institute has held exhibitions by Finnish artists, large screenings of Finnish films and concerts of modern music in cooperation with the Finnish embassy in Rome.

The institute has served the Finnish world of art since its very beginning by providing Finnish visual artists with a place to live and work at the Villa Lante, and as early as the 1950s the foundation granted scholarships for artists to work in Rome. Since the early 1960s the institute has had a separate artist's apartment and a studio.

The Finnish Institute in Athens

The Finnish Institute in Athens aims to arrange one cultural event a year. This year, in partnership with the Athens National Orchestra, the institute will arrange a concert of Finnish 20th century music, which at the same time will celebrate the institute's 20 years of operations. The institute also supports the translation of Finnish literature into Greek, arranges meetings with and lectures by Greek authors in collaboration with the Union of Finnish Writers

The Finnish Institute in the Middle East

The Finnish Institute in the Middle East has supported Finnish artists by small travel grants. Although the institute does not consider cultural exports as its main mode of operations, it assists cultural export projects whenever possible.¹³⁵

Proposed measures for a revised cultural and scientific institute strategy:

- The technical division into cultural and scientific institutes does not reflect the work of the institutes. Consideration should therefore be given to whether they could be merged into a single category comprising both cultural and scientific institutes.
- The Finnish cultural and scientific institutes abroad and the information centres based in Finland should build a joint information network for cultural exports. The network should produce high-quality presentation material in other languages besides English.
- Consideration should also be given to the institutes' operating models. In some cases operating in-house is a good solution, in others operating outside increases visibility and saves resources.
- The institute network should also be studied vis-à-vis globalization development. The focus is shifting to China and India.

The Foundation for Cultural Policy Research CUPORE

International cultural policy research and development forms an essential part of international cultural exchange and also holds a key role in many countries in their effort to promote cross-border mobility in international trade and culture. Over the past few years, the Ministry of Education has been coordinating research in the field by focusing its support on the Foundation for Cultural Policy Research CUPORE, which was founded by the University of Jyväskylä and the Finnish Cultural Foundation in 2002. The foundation's centre in Helsinki has included in its own research programme for 2004-2005 a project on the international mobility of cultural labour, cultural products and intangible resources. The centre is and expert member of several European and international networks and research projects.¹⁷⁴

Ministry of Trade and Industry

Companies can apply for subsidies from the Ministry of Trade and Industry for joint internationalization and export promotion projects and company-specific internationalization projects. As of 1997, the Ministry has been running three content production projects in which the authority in charge has been the Employment and Economic Development Centre for Uusimaa and for which ESF support has been provided. The projects have analysed the competitive edge of the content production business and its competitiveness in international customer markets, as well as content production and the development of the value of small and medium-sized infocom companies from the point of view of business know-how.³³ In cooperation with the Finnish Film Foundation, the Ministry conducted a survey which studied films as a business and looked at audience behaviour in expanding markets. The survey also compared the operating environment of the European film with that of the American film to establish the success factors and development trends.³⁴ In addition, the Ministry and Finnish music industry entrepreneurs carried out a joint survey on the income formation of the industry's core sectors, its revenue model and international markets. The survey also incorporates a SWOT analysis of the Finnish music industry and a development survey of training needs from the perspective of entrepreneurship and business know-how.³⁵

The Ministry of Trade and Industry has also launched a new SILE project, scheduled for completion in 2006, to promote the operations and internationalization of content production businesses and network them with software and technology companies. The plan is to develop a consultancy network, a virtual business incubation network and a portal, Finnishdigibusiness.fi, to provide services for companies.

Among the organizations receiving ministry support are Diges, Design Forum Finland and the research centre of the Lahti Design Institute.

Other organizations under the Ministry's purview include the Employment and Economic

Development Centres, Tekes, Finpro, Finnvera and Finnish Industry Investment Ltd, which all provide support for Finnish exports.

Co-projects

Aid applications can be submitted to the Ministry of Trade and Industry by industry for joint, sector-specific export promotion events, projects enhancing the dissemination of commercial and industrial information, other joint internationalization ventures by exporting companies (e.g. trade centre networks) and for national tourism projects and other large international marketing projects. A minimum of four enterprises are required for all joint ventures.

The Act on Discretionary Government Transfers (688/2001) is applied for sector-specific internationalization subsidies, while the Government Decree on State Aid for Promotion of Internationalisation of Enterprises and on General Aid to Organisations and Corporations Enhancing Foreign Trade and Internationalisation of Enterprises (1155/2001) are applied to the subsidies themselves.

Aid recipients and use targets

Aid can be granted to an organization promoting foreign trade, a sectoral group representing enterprises or to a company which is responsible for organizing a project or an event promoting exports. The participating company must have the prerequisites to engage in continued profitable business and exporting. The aid may be used to make Finnish exports and expertise known in new markets, to extend market shares and for joint export promotion events of Finnish exporting companies that support the internationalization of businesses.

Aid is granted for example for:

- participating in exhibitions, disseminating information at international exhibitions and product demonstrations,
- purchase of consultancy services aimed at improving companies' exporting capabilities,

Projects	1998	1999	2000	2001	2002	2003	2004 (prelim. info.)
World fairs	2,396	-	11,773	-	-	-	1,240
Cultural capital project, Helsinki	-	-	198	-	-	-	-
Other projects	16	80	196	147	20	188	-
Total	2,412	80	12,167	147	20	188	1,240

- marketing surveys conducted by external experts independent of the buyer, strategy reports and feasibility studies,
- marketing survey trips and fact-finding missions,
- preparing joint brochures, videos and Internet advertising for exporters and other material needed for presenting Finnish export services,
- paying the costs in Finland or abroad of export managers, trade centre managers or marketing personnel, jointly recruited by exporters,
- export publications and other joint publications by enterprises.

As a rule, aid is granted up to 50% of eligible expenses. The aid can also be differentiated in a way which allows more aid to be given to the small and medium-sized enterprises in the project than to the larger companies. In the definition of the company size, the Commission Recommendation 96/280/96 concerning the definition of small and medium-sized enterprises applies.

Aid is generally not granted for expenses incurred from export promotion projects that are not considered to make a substantial contribution to the implementation of the project. Neither are expenses for which other public funding has been received eligible for aid. If the project generates

sales, advertising or other revenues, these will be deducted before confirming the final amount of the aid.

The applications for co-project funding should be addressed to the Trade Department of the Ministry of Trade and Industry.

Company-specific internationalization projects

Small and medium-sized enterprises may apply for support for development projects concerning the internationalization process from the Employment and Economic Development Centre in their area. In addition to individual businesses aid is granted to internationalization projects that several companies carry out jointly by mutual agreement. The company-specific internationalization subsidy is part of the development support directed at SMEs under the Aid to Business Act (1068/2000). The support is discretionary government aid.

Aid is used to improve the readiness of SMEs to internationalize their operations and to create the preconditions for SMEs to start up or expand their exports. The aim is to prepare the ground for new export businesses and to internationalize existing

businesses, to improve companies' accessibility to new markets and to launch new export products. Support cannot, however, be granted to actual export operations and related costs; the support is intended solely for the improvement of companies' international readiness.

The company to be supported must have sufficient financial and other operating and development potential.

Apart from farming and fish farming, all types of businesses throughout the country can apply for the aid. Aid can be applied for a maximum of 50 per cent of the expenses on which the aid is based. The financing ceiling is EUR 170 000. The expenditure, on which the internationalization aid is based, is usually approved for 12 months at most, the absolute maximum being 24 months.

The aid is paid in arrears on separate application in accordance with the progress of the project usually in one or two instalments. The aid is paid by the Employment and Economic Development Centre which granted it.

Development aid is not generally awarded to a project which receives some other type of government grant. One exception may be projects in which the division of financial aid between several sponsors is justifiable because of the extent or the regional significance of the project.

Aid recipients and use targets

Aid is granted to small and medium-sized companies. In the definition of company size, Commission Recommendation 96/280/96 concerning the definition of small and medium-sized enterprises applies.

Expenses eligible for internationalization aid are divided into four categories as follows:

- use of external services and expert consultants,
- participation in an exhibition held abroad,
- marketing research travel,
- payroll and travel expenses of a new key person required for the development of the internationalization capabilities of the company.

The applications must be submitted to the Employment and Economic Development Centre first before taking any other action.

T&E Centres offer development services to improve SME know-how

The Business Departments of the Employment and Economic Development Centres (T&E Centres) organize entrepreneurial training for SMEs, arrange management training, training for key personnel and other staff, assist in regional development projects, and provide commercialized consultancy and information services. In addition, the centres provide start-up services for new companies and development services for existing companies. The practical implementation of the development services is given to external consultants, generally private consultancy companies.

For growth-oriented and internationalizing SMEs the T&E Centres provide support in both business management skills and internationalization readiness. The services include a wide range of development programmes, such as the Kunto programme, which evaluates the company's current state of business and development needs and draws up a development programme for the company, the Balanssi programme improves SME financing expertise and the Globaali programme develops SMEs' internationalization capabilities. The T&E Centres provide altogether 15 short-term analysis tools based on consultation to help companies launch their own business development programmes.

Education and entrepreneurial training is also used to promote the business skills and internationalization capabilities of management and key personnel. The aim is to give the participants an overall picture of how to run a business and the demands of internationalization. The length of training varies depending on the needs of the companies taking part. The training usually incorporates consultation for individual companies and often an international study trip.

In addition to individual training programmes,

the T&E Centres carry out some large-scale regional development programmes with partial funding from ESF. MESI - a national company development programme for digital media and content provision, was a Media Tampere and Culminatium cooperation project and one example of how to promote and internationalize culture. The aim of the project was the development of digital content production as a cooperation effort of regional development organizations and centres of expertise. The project extended to the participants the internationalization expertise of content production companies in the form of the Muusa - Kasvu- ja kilpailukyky (Muse - growth and competitiveness) and Mobiilisisällöt liiketoimintana (Mobile contents as a business) programmes. The content production project Sistu organized by the Uusimaa T&E Centre generated report and research data to help develop business in the sector and provided training for the promotion of business operations and internationalization. The Uusimaa T&E Centre is continuing to develop the sector with a new SILE project, launched on partial ESF funding at the beginning of 2004.

The pricing of T&E Centres' chargeable services for the development of business expertise in SMEs is at the moment provided for by Ministry of Trade and Industry decree (16/2001). Under this decree, the participating companies or entrepreneurs are charged for individual transactions at least one sixth of the annual amount allocated in the State budget to the expenses incurred from their production under subsections 32.10.22 and 32.30.62 of the budget proposal for each year. Development services are provided as what is known as 'non-essential' aid.¹³⁶

Tekes

Tekes, the National Technology Agency, is a public financing organization for research and product development funded from the state budget.³⁶ The primary objective of Tekes is to promote the competitiveness of Finnish industry and the service sector by means of technological know-how, diversify production structures, increase production and exports, and create a foundation for

employment and social wellbeing. In 2004, the percentage of the technology policy budget received by Tekes was 74.4, i.e. EUR 392 million.³⁷ In addition, Tekes receives EU Structural Fund money for project and programme reports and its own operating expenses. Tekes funds a total of 2,000 research and development projects annually.

Tekes also promotes international R&D cooperation and assists in project launches. It assists companies in their internationalization efforts by passing on information and finding them the right partners to collaborate with in Europe. Tekes also encourages companies and research units to take part in global programmes. In addition, Tekes funds preliminary reports that small and medium-sized companies and research units require to take part in international cooperation projects.

Two of the Tekes's current technology programmes are directly related to content production. The interactive computing technology programme FENIX, which focuses on games and entertainment applications and mobile services, in which human-computer interaction and its management plays a major role. The programme goal is to activate companies to develop and market internationally competitive products and services. The other programme with a cultural content is Muoto 2005 (Design 2005), a technology programme for industrial design that was launched at the beginning of 2002. The programme seeks to make design part of our national competitiveness strategy by raising the level of research in design and using design skills for corporate R&D and company strategies and by developing the service provision of design companies. The programme will continue until the end of 2005.¹³⁷

In addition, at the beginning of 2004 Tekes began an assessment of the need for a technology programme on the leisure and incentive industry. The assessment will be completed in autumn 2004, after which a decision will be taken on whether to launch the programme. The aim of the assessment is to define the incentive industry and leisure cluster, to study the value chains in the business and the development needs and benefits of the technologies involved. The assessment will also

study what the impact of the programme would be on the industry.³⁸

Finpro

Finpro is a registered association owned by Finnish companies, which assists Finnish companies to enter the international market as swiftly as possible and reduce related risks. Its membership comprises some 600 Finnish companies, the Confederation of Finnish Industry and Employers and the Federation of Finnish Entrepreneurs. Finpro is active in all branches of business where it can produce added value for Finnish companies in international competition. It helps Finnish companies to find effective models during the different stages of internationalization and seeks to ensure the availability of efficient, high-quality internationalization services particularly for SMEs in different parts of the country. A key means to this end is a network of export centres which comprises, in addition to the Helsinki office, another 52 export centres in 40 countries. Finpro experts are following any changes in the competitive edge in the target countries from the point of view of Finnish companies. The operations focus on the branches of industry and market areas where Finnish companies have a particular competitive edge or which are of interest to the companies as potential markets.³⁹ The fact that Finpro services are dimensioned for large-scale operators has been felt to be a problem.

Finnvera

As a state-owned financier Finnvera supplements the Finnish financial markets and promotes the development of the operations of Finnish businesses, exports and the regions. Finnvera plc is a specialized financing company which enhances and diversifies the financing options of Finnish companies through loans, guarantees and export credit guarantees.

Finnvera finances viable business ideas for which funds on reasonable terms from market lenders are insufficient due to the companies' lack of securities or resources. The participation of the Finnish state

in credit losses improves Finnvera's risk-bearing capacity in business financing compared with the market lenders and enables Finnvera to share the risks with them. Finnvera provides financing solutions to suit all stages of a company's business.

Finnvera offers financing for SMEs in all business sectors with the exception of some forms of building development and basic agriculture. Finnvera can thus finance cultural enterprise in the same way as it does companies in any other business.

Finnvera's financing decisions are always made on a case-by-case basis. Before the decision, Finnvera evaluates the company's business operations, competitiveness and future viability. The evaluation of the company's profitability, solvency and liquidity is essential to ensure repayment of the credit on one hand and to assess the sufficiency of financing on the other. In addition, the evaluation will chart the risks involved in the business and the company's ability to manage them. The evaluation also incorporates an assessment of the entrepreneur him or herself. In the cultural sector, businesses are typically small, which means that the success of a company largely depends on the personalities, expertise and skills of entrepreneurs who have to be able to manage all aspects of running a business, financial matters included.

Finnvera provides loans, guarantees and securities for investments and working capital in a new business or the expansion or development of an existing enterprise.¹³⁹

Private venture capital for the creative economy

CIM Creative Industries Management Ltd, which manages the Venture Fund for Creative Industries, was founded in Finland in 2000. The company is an international pacesetter in its field and in the value chains of creative industry. It has developed its own sector and provision over four years and is a vindication of an innovative Finland. Its operations also incorporate CIM Finance & Research which is a financial advisory and fund management company and a subsidiary in Scotland, CIM

Scotland. The company has a network in the Nordic countries, Continental Europe, USA and Japan in addition to the UK. The companies specialize in the finance and development of creative industry (private enterprise in the development and commercialization of immaterial rights).¹⁴⁰

Ministry for Foreign Affairs

Department for Communication and Culture¹⁴¹

The following duties come under the aegis of the Department for Communication and Culture in accordance with the working order of the Ministry for Foreign Affairs:

- The Ministry's internal and external communications;
- Promotion of Finland's foreign policy, trade and economic policy and development policy goals by means of Finnish culture and communications;
- Making Finland known, producing, acquiring and distributing related information;
- Finland's international media and cultural relations.

Over the past few years, public diplomacy has become common as a collective term for all the duties listed above. Public diplomacy supports the attainments of Finland's external goals either directly through publicity or by increasing Finnish identity and esteem.

Cultural exports holds an important position in the Foreign Ministry's public diplomacy both as a goal and an instrument, two at times inseparable roles. The key actors are the embassies and consulates general, almost one hundred in all.

The common denominator in public diplomacy is to strengthen Finland's reputation as a modern, youthful European country, which is able to combine top technology, education and culture with Scandinavian society and a clean environment as its success factors.

Cultural offerings by foreign missions

The culture supplied by foreign missions as part of their public diplomacy policy is aimed at the main political, economic and cultural opinion formers in the host countries. In some countries, high-standard cultural offerings offer a direct route to the political and cultural decision-makers. In others, it is of marginal interest to a small group of enthusiasts. There are also countries where extending the cultural supply beyond the diplomatic community is directly forbidden. The target groups do not necessarily serve the goals of (commercial) cultural exports. On the other hand, there are countries, such as the United States, where the political and economic elite as sponsors exert influence in the field of culture. The premises, resources and distance from Finland also affect the cultural offerings of the missions. The extent and quality of operations vary from the supply of a full-scale cultural centre with extensive exhibitions and concerts, including their own CD Rom productions (Washington DC) to touring 'suitcase' exhibitions and small-scale concerts.

In most cases, the missions act as intermediaries between Finnish cultural circles and local producers and cultural institutes for the promotion of Finnish culture. The missions may participate in the financing of events and arrange introductory receptions for them and other related functions. The missions include cultural exports and other public diplomacy costs in their own budgets. The budgeted costs of cultural activities and information dissemination of the 34 missions (including the biggest missions) that had itemized their public diplomacy costs in their 2002 budgets totalled about EUR 1.25 million. Culture is estimated to account for 60-70% of this figure.

In nine missions (Tokyo, Moscow, Tallinn, Stockholm, Copenhagen, London, Berlin, Paris and Washington) there are 14 full-time posted press and cultural officers. In four (Moscow, Stockholm, Berlin, Washington) there is both a press and cultural counsellor, in the others one person handles both duties. In the other missions, press and cultural office duties are handled as an additional duty.

The Department for Communication and Culture has a supporting and coordinating role

The Department for Communication and Culture coordinates and supports the supply of culture to missions, for example by hiring performers, arranging exhibitions and participating in the financing of the events, particularly if the exhibitions are important ones and need to be arranged at short notice, for example, at the same time as important visits. In 2003, the department took part in 70 co-projects, with a total cost of about EUR 200,000. Of this sum, music, visual art and design projects each received about one quarter and the rest was divided among other forms of art.

The department does not grant subsidies. Any coordination projects in which the Department for Communication and Culture pays against receipts (e.g. the travel and accommodation costs of performing artists, exhibition transport and installment costs and exhibition catalogue publication costs) are based on agreements between the department and the parties involved in which the latter commit themselves to a certain performance within Finnish public diplomacy.

Every year, the Department for Communication and Culture invites cultural reporters and opinion formers to Finland to take part in major festivals at the suggestion of the organizers. In 2003, the department invited and paid for 155 such guests. The costs of these visits totalled around EUR 130,000. According to the cooperation partners, over the years the invitations have helped Finnish festivals to rise to the very top in Europe.

Partners

The cooperation between the Ministry for Foreign Affairs and the Ministry of Education concerning international cultural affairs is wide-ranging and well established. The Department for Communication and Culture, the units concerned at the Ministry of Education, and the Secretariat for International Affairs negotiate annually about international issues related to their own purview. Negotiations concern all issues related to Finnish cultural exports and the parties agree on their division of labour particularly

as regards major projects. Smaller meetings are held when necessary, e.g. four times a year before the Steering Committee meetings for Nordic Cultural Projects organized by the Nordic Council of Ministers. Other Foreign Ministry partners in cultural exchange projects include the Finnish Literature Information Centre, the Finnish Film Foundation, Design Forum Finland, Frame, national art galleries, the Finnish Music Information Centre, Finland Festivals, the Sibelius Academy and the Dance Information Centre.

Internet and printed publications

Virtual Finland (<http://virtual.finland.fi>) is the most important online channel for the promotion of Finland and passing on information about it. It opened in 1995. It is the biggest and most popular (approx. 3 million annual visits) English language website about Finland on the Internet. Virtual Finland offers an almost encyclopaedic, continuously updated collection of articles about Finland on the one hand and on the other, a Newsroom site with news about Finland from Reuters news agency, daily news photos from Lehtikuva and links to all other news sources in Finland. Virtual Finland's language selection will expand in the near future.

Examples of Finnish printed publications include the Foreign Ministry's own Finfo leaflets, published in five languages, and Fact Sheet Finland for basic Finnish information, which to date has been published 34 times. The most important of the purchased printed products include two Otava basic information packages: Find out about Finland, published in 17 languages, and Facts about Finland, published in 10 languages. The Department for Communication and Culture also buys within its appropriations other reference material for distribution by Finnish embassies abroad.

The Department has also financed Finnish culture through significant purchases of cultural publications (table appended). In 2003, a total of EUR 83 257 was used for this purpose.

In addition, the Department promotes Finnish music by purchasing records for distribution by the

foreign missions to opinion formers and radio stations.

EU film festivals are increasingly often arranged in countries outside the Union. As the Finnish Film Foundation's resources have not been sufficient for the organization to participate in these, the Department for Communication and Culture has begun to acquire copies of films for the purpose.

Problems

The Parliamentary State Auditors point out in their report for 2002 that the contribution of Finnish missions to public diplomacy and cultural assignments in particular has been poor, with the exception of a few of the largest missions. Performance could be improved at missions by redirecting resources more effectively into public diplomacy. Cultural events arranged abroad offer internationalizing Finnish companies, for example, excellent opportunities to improve their corporate image and thus advance the internationalization process and boost their market accessibility. The report refers to the Arts and Business organization founded in the UK as a possible sponsorship model to promote arts and culture by bringing together art institutions, individual artists and businesses. In the opinion of the auditors, this model could offer

new ideas and prospects for the promotion of Finnish culture and exports, too.

It is important that the missions recruit new staff with good professional capabilities for public diplomacy. Culture is exported abroad mainly via cultural enterprises, organizations and civic action. The Cultural Department of Communication and Culture at the Ministry for Foreign Affairs and the missions endeavour to create the preconditions for this work. Since the Ministry and the missions have no significant financial potential for funding cultural exports, the foreign affairs administration should work actively to find Finnish and foreign parties to finance the operations.

Neighbouring area cooperation

On April 22, 2004, the Government approved Finland's strategy for neighbouring area cooperation *Tuesta kumppanuuteen* (From support to partnership). According to this strategy, neighbouring area cooperation is part of a more extensive cooperation programme, for which European Union Neighbourhood policy, Nordic Dimension policy and the Union's policy on Russia provide the framework.

Magazine purchases:

FMQ	Finnish Music Quarterly	21,00	800	16 800,00
Books from Finland	Books from Finland 1-4	11,26	900	10 140,00
Finnish Society for Research in Sport and Physical Education	Motion - Sport in Finland nos. 1 and 2	4,60	200	1840,00
Design Forum Finland	Form Function Finland, 4 nos. per year	8,75	1000	35 000,00
Alvar Aalto Academy	Ptah magazine	16,50	300	4950,00
Design Forum Finland	Design in Finland	3,33	3000	10 000,00
Dance Information Centre	Finnish Dance in Focus	6,73	500	3 027,42
Finnish Theatre Information Centre	Finnish Theatre - Theatre Finlandais	3,00	500	1 500,00
UPI	Yearbook of Finnish Foreign Policy	14,00	500	7 000,00
			Total	90 257,42

Since the 1990s, Finland has been actively involved in supporting political and economic policy change in Western and Eastern Europe with EUR 1.1 billion being used for this purpose in 1990-2003. Neighbouring area cooperation strategies approved by the Government in 1993, 1996, 1999 and 2000 have steered the implementation of cooperation.

All ministries, plus several government agencies and institutions have taken part in neighbouring area cooperation. Regional and local actors, NGOs, businesses and education institutions have held a key role in the implementation of neighbouring area cooperation.

Neighbouring area cooperation is shifting towards a programme-based approach with the ministries preparing programmes that last for several years. Partnerships among various sectors and synergy benefits are sought when appropriate. The multi-sectoral approach endeavours to strengthen cooperation networks and to promote cooperation among the parties involved in the collaborating country. Arts and culture is a typical part of this multi-sectoral policy. The proposed joint cultural export cooperation body to be set up by the Ministry of Education, Ministry of Trade and Industry and the Ministry for Foreign Affairs must create a multi-sectoral neighbouring area cooperation programme for cultural exports with special focus on the promotion of cultural exports between Finland and Russia.

Development cooperation

Our definition of cultural exports means an exchange of cultural meanings from one cultural sphere to another and as a cultural partnership it also covers development cooperation. The aim is to create and strengthen the basis for village cooperatives and private enterprises (particularly for women entrepreneurs) in the field of creative and cultural production.

Finland can use technological solutions and mobile applications in development cooperation, which strengthen the infrastructure of and practices

in cultural production and marketing. Small-scale, original and local cultural production can reach a worldwide, specialized and interested public and find markets when marketed through the Internet. Implemented in this way even small-scale marketing reaches the public and does not need to compete with mass culture. Through the originality and individuality of their meaning production, different cultural circles can also enrich homogenized, postcolonial cultural production. The model will help the community to value and maintain the foundations of their own culture and create new culture from it. At the same time, communities can earn a living from cultural production.

In the Finnish development cooperation programme for 2004, culture is seen as an across-the-board resource for development; something that defines values, customs and social institutions, a cornerstone of security and stimuli, a remedy for human challenges and problems, typified by continuous change. Initially, Finland will support projects that help developing countries to acquire the basic readiness to develop into an information society, for example, through the preparation and implementation of information society strategies and linking them with national poverty programmes. It is justifiable to promote development whereby communities learn methods of surviving in the global economy in a controlled manner based on their own needs and in accordance with the individual traits of their own culture.⁴¹

The report on the internationalization process in Swedish culture, Internationella kulturutredningen, has evaluated the Swedish International Development Agency's development cooperation as part of Sweden's international cultural operations. The report believes that the work has been successful and is opening up new potential. The premise is to promote cultural cooperation and creative enterprise.

In Finland, the Foreign Ministry's Department for Development Cooperation has also promoted cultural cooperation projects. For example cartoon, video, puppet theatre and animated film workshops have been arranged in partnership with local

directors in Dakar, Senegal. Young girls have been given instruction in fabric printing, sewing, health education, drama and video work.⁴²

Efforts have been focused on cartoons as a communications medium for Tanzanian and Indian NGOs by training cartoon workshop directors for local partnership organizations and by supporting production and distribution of their cartoons. The Artafrika project, which is currently under way, aims to build a virtual gallery into a sales channel for works by African artists.

So far, the services of Finnish experts have been used e.g. for the protection of Peru's historic Macchu Picchu site (1998-2000) and to chart Egypt's cultural monuments (2000-), for example. The Bethlehem cultural centre, designed by Finnish architect Juha Leiviskä, was inaugurated in September 2003. In addition, works by other

Finnish artists have been exhibited in a number of African galleries and arts and crafts workshops.

Finland has had few cultural exchange agreements with developing countries. The trend is to use arrangements which focus on the promotion of direct contacts among institutions, organizations and experts.⁴³ Support has also been aimed at productization that stems from the country's own tradition and allows local people to enjoy the financial benefits of tourism.

Proposal for action:

- The Ministry for Foreign Affairs, the Ministry of Education and the Ministry of Trade and Industry draw up a joint Finnish cultural partnership strategy for north-south cultural production.

Cultural exports in the EU

At the European Union level; cultural activities are based on Article 151 of the EU Treaty, under which the Community shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore. EU enlargement will further expand the Union's internal cultural and linguistic diversity and thus affect the cultural sphere within the Union.

The Article on culture contains a conflict between non-commercial cultural exchange and commercial cultural exchange. The Article states that action by the Community shall be aimed at encouraging cooperation between Member States in the following areas: improvement of the knowledge and dissemination of the culture and history of the European peoples, conservation and safeguarding of cultural heritage of European significance, artistic and literary creation, and the audiovisual sector. The Community and the Member States shall foster cooperation with third countries and international organizations. The Article does, however, state that this action does not apply to commercial cultural exchange.

The audiovisual sector forms its own separate entity based on the Television Without Frontiers

Directive. It establishes the legal frame of reference for the free movement of television broadcasting services in the EU internal market and the obligations to devote, whenever possible, over one half of the broadcasting time to European works. The Community and the Member States shall foster cooperation with third countries and competent international organizations.

Policies promoting the effectiveness of the EU single market and trade between the Member States can also be applied to the sphere of culture. When necessary, the provisions governing the single market take account of cultural aspects. Thus EU cultural policy is promoted through the free movement of people, goods and services, taxation policy, copyright and neighbouring rights and competition policy. Free movement of cultural objects can, however, be limited to protect artistic, historical or archaeological national treasures.

The European Union endeavours to bring national systems closer together by harmonizing value-added and company taxation. Member States may apply reduced VAT rates on certain goods and services defined in the directives. Over the past few years France has been promoting the reduction of VAT on sound cassettes and records, but the proposal was not included in the Commission

proposal of July 23, 2003 to revise the VAT directive.⁴⁵

EU copyright legislation covers the duration of protection, rental and lending rights and certain neighbouring rights, satellite broadcasting and cable retransmission. Other areas covered by EU directives include legal protection of computer software, databases and artist's resale right. Also copyright and related rights in the information society are harmonized by a directive. The protection of copyright and related rights is largely based on international treaties drawn up by the World Intellectual Property Organization (WIPO).

Businesses working in the cultural and creative industries are subject to EU competition policy, although the special features of the sector are taken into account in that government subsidies are allowed if their aim is to support the promotion of culture and cultural heritage. The support must not, however, affect adversely trade relations among the Member States. In addition, EU efforts to develop SMEs also apply to cultural enterprise.

At the international level, EU actively centres mainly on the trade in cultural products and services as part of its integrated trade policy and on the protection of world heritage. EU external policy is based on cooperation and trade agreements and on cooperation with international organizations. EU support programmes focus mainly on economic and institutional issues or on environmental protection but may also have cultural content.

In cultural competitiveness, EU is in the position of the underdog vis-à-vis the United States. Paradoxically, compared with the new world, Europe has rich, old and profuse cultural resources, in other words, enormous cultural capital. The issue is one of how to make use of this capital. So far, the EU has no strategy for cultural exports, although culture, including commercial cultural production and cultural exports are supported in practice with EU programmes for the cultural and audiovisual sector.

In addition to its Culture 2000 Framework Programme, the EU provides support for the cultural and audiovisual sector from several EU funds: the Structural Fund, the Media Plus

programme, the Youth Programme which promotes international cultural activities by young people themselves and EU education programmes, as regards mobility.⁴⁴ Another programme with a cultural focus is the European Capitals of Culture project which emphasizes the richness and diversity of European cultures. In order to improve cultural person-to-person exchange, the Union also supports twin-town activities.

Culture 2000

The first EU cultural framework programme, Culture 2000, was created to promote international artistic and cultural cooperation projects. The programme seeks to encourage intercultural dialogue, cultural creation and dissemination, the mobility of the artists and their work, new forms of cultural expression and the socio-economic role of culture. The Culture 2000 programme supports European co-projects with cultural organizations from several countries taking part. The programme enables 30 cultural organizations from different countries to participate in the cooperation. Moreover, cultural organizations in non-participant countries can take part in the projects under certain conditions. Organizations can participate as the main organizer, co-organizer or as a cooperation partner. The programme budget for the five-year term 2000-2004 is EUR 167 million. During its first three years, the programme supported more than 700 cooperation projects and financed the translation of 250 works.

The programme also enables the networking of Finnish cultural organizations and reinforces contacts and cooperation channels elsewhere in Europe. The Finns carry the main responsibility in 30 projects. Under the programme foreign publishers have translated Finnish literature into at least six languages. As co-organizer, Finland has been involved in at least 86 projects, most of them in the performing arts (28), the visual arts (23) and cultural heritage (23). Finnish cooperation partners in the projects have totalled about 50.⁴⁶ The programme has been seen as an important tool for

international networking and the development of the sector.

A decision has been made to extend the Culture 2000 programme by another two years, which will increase the total funding to EUR 236 million.⁴⁷ The continuation period will be used to try out with preparatory measures how to supplement Community cultural operations. The launch of the new cultural framework programme is scheduled for 2007. Its areas of focus will probably be the mobility of artists, cultural workers and work, and intercultural dialogue.⁴⁸

Audiovisual programmes

Media Plus is a programme aimed at the development, distribution and sales promotion of European audiovisual works with participants from nine applicant countries and the EEA countries in addition to the EU countries. Originally, the programme was designed to finish in 2005, but the Commission has proposed its extension by one year.⁴⁹ Media Plus has provided partial funding for several Finnish films, for example. In 2002, project development aid was granted for three Finnish film festivals.⁵⁰ In addition to the EU Member States, Norway, Iceland, Lichtenstein and the new member countries are taking part in the Media Plus programme.

The programme supports the development of audiovisual projects targeted at European and international markets. The audiovisual projects may be fictitious, documentary or animated films or multimedia projects. Aid may also be granted for individual projects or several projects (slate-funding). The aid granted is direct support. The Media Plus financial contribution may be a maximum of 50% of the development budget for the project. The projects promoting the diversity of European culture may, however, be eligible for 60% financing from the EU. In 2002, eight Finnish film and multimedia producers were granted Media Plus project development aid.

The aim of the Media Plus programme is to support the distribution of European films outside

their production countries. The project supports television distribution, film distribution, international distributors and cinema networks. Despite the tough competition, three Finnish projects were granted Media Plus television distribution support in 2002.

The European Union promotes international sales of films and multimedia productions and the creation of networks for professionals in the audiovisual sector by channelling support for film sales and festivals under the Media Plus programme. In 2002, Media Plus festival support was granted for three Finnish film festivals: Espoo Ciné, the Midnight Sun Film Festival in Sodankylä and the Tampere Film Festival.

Media Plus supports the training of professionals in the audiovisual sector with the aim of improving international competitiveness. Support is granted for training in script writing, production and new technology.

The programme also supports pilot projects designed to respond rapidly to the challenges of changing technology. The European Commission also channels support for the acquisition of external funding from banks and financial institutions for European production companies through its i2i programme. Under the programme, production companies can apply for funding to cover loan interests or insurance contributions.⁵¹

eContent

Content production is included in the eEurope Action Plan. The objective of the Commission's eLearning Initiative is to stimulate European education and cultural communities in order to accelerate the development of educational systems and Europe's transfer to a knowledge society.⁵² The objective of the eContent programme on the other hand is to support European digital content production, use and distribution in global networks, such as mobile networks and the Internet. All content producers, users and distributors in Europe can participate in the programme. eContent is a market-oriented programme; the aim of the project is to be

commercially profitable. The programme also plans to promote cooperation in the sector among all parties involved. The overall budget totals EUR 100 million. The Finns have not been too keen to apply and participants have come mainly from the civil service. The projects might be useful, though, in that they could bring in new cooperation partners and at best open a new distribution channel to European markets.⁵³

The eTEN programme promotes the marketing of European digital products and services of common interest in areas such as education and culture. The programme supports companies during their start-up stage and the amount of funding reserved for the period 2000-2006 totals EUR 276 million.⁵⁴ The objective of the audiovisual Innovation 2000 Initiative is to offer different financing options and budget support through the European Investment Bank for the European film and audiovisual industry, so that it can meet the challenges set by culture and technology.

Structural funds

Cultural activity is also funded from the EU Structural Funds, mainly from the European Regional Development Fund (ERDF) and the European Social Fund (ESF). The objective of the Structural Funds is to improve economic growth, employment and regional competitiveness and harmonize regional development. It is also desirable that private funding would be available for the project. The projects to be supported must be new, innovative and comply with a Single Programming Document measure. Which programme to apply for depends on the area of the Objective Programme where the potential beneficiaries are. Most Structural Fund funding is channelled through the Objective Programmes. The rest is divided among community initiatives and other innovative

measures. Community programmes complement the Objective Programmes and emphasize cross-border, transnational and interregional cooperation.⁵⁵ The promotion of cultural operations is covered by four community programmes – Interreg III, Urban, Leader+ and Equal.

In its guidelines for 2000-2006, the European Commission requires that Member States promote the cultural sector with a view to stimulating employment. Through culture, the regions can improve their tourism potential in addition to strengthening their identity. Many new jobs are in fact being created in the cultural sector and the development of online services and communications media, for example, is strongly supported.

The Department of Social Sciences and Philosophy at the University of Jyväskylä has been commissioned by the Ministry of Education to study EU Structural Funds as supporters of Finnish cultural life from the Finnish perspective during the first Structural Fund period 1995-1999. According to the study, culture received a total of FIM 820 million, i.e. 2.8% of all project funding.¹⁴²

The position of culture, measured by the development of the financing framework and the definition of the priority areas in the cooperation document, has improved year by year in the regional cooperation documents for the Objective 2 Programme. For example, in Southern Finland cultural projects received Objective 2 funding from the State Provincial Office totalling EUR 8.5 million in 2002-2002. Altogether 51 projects received funding.⁵⁶ The emphasis on culture varies both in the Objective 2 areas in Southern Finland and Western Finland and in the Objective 1 areas in Eastern Finland and Northern Finland in the 2000-2006 programming documents.⁵⁷ For example, regional cultural spearheads, the culture industry, and the commercialization and quality of all-year-round tourism are being developed as attractions in Western Finland.

The present state of Finland's cultural exports

In cultural production and exports, income is generated through the administration of immaterial rights in the various fields of art and culture. For example, in literature and drama, exports consist of the rights to books and plays.

The most important exports, however, stem from the demand for Finnish work. Visibility at exhibitions and competitions, in portals, at trade fairs and other fora increases interest and supports this principal objective, the demand for Finnish work. The best export result is for a foreign party to commission a work from a Finnish artist, author, designer or architect. Increasing the demand for the work of Finnish art and culture professionals is the principal objective because such work brings money into Finland.

This can take place on several levels:

1. The best option for the national economy is for Finns to do work for a foreign customer in a Finnish company;
2. Work done by Finnish companies is a good alternative. This requires the creation of cultural enterprises and agencies of an international calibre in Finland;
3. The success of Finnish artists can result in a financial benefit to the national economy greater than the training resources invested in them or (if the artist is resident elsewhere) an image benefit by association.

This description of the present state of Finnish cultural exports is based on material collected by various active parties, demonstrating a rich and varied spectrum of cultural exports. It proved necessary to exclude some material and several excellent examples of cultural exports in order to limit the report to a reasonable size. All the material will be posted on the website of the Ministry of Education.

For each branch of the arts and culture, the most relevant examples of the wide range of proposals for action have been selected. Proposals that involve all or most branches have not been repeated separately

for each branch; instead, they have been collated into a section on proposals for the entire cultural industry. Many of these proposals involve the form of and criteria for subsidies:

- Cultural exports receive too little support, more resources are needed;
- Enhance publicity, promotion and marketing. Increase the resources of the information centres and make them more internationally oriented;
- Export subsidies are needed for all actors in the value chain – not only artists but curators, managers, producers, companies and galleries;
- Branches of the arts and culture capable of exports need professional export promotion organizations. A self-marketing artist is not internationally credible;
- Expand the criteria for subsidies to apply to participation in international joint productions;
- Subsidies are also needed for networking, travel, trade fairs and promotional appearances, and the upkeep of portals;
- Large international projects require long-term commitment over a period of several years. Security of a subsidy beyond the scope of a single budget year is needed;
- Develop the operating principles of the organizations and structures supporting and assisting in cultural exports and draw up joint strategies (cultural institutes, embassies, Finpro, Tekes);
- Complement networks with added resources: set up a cultural export fund to which businesses too could apply. Subsidies could be awarded on the basis of export plans covering 3 to 5 years and channelled to existing actors and/or directly to individual projects;
- Safeguarding copyright through legislation in the new systems of distribution and use enabled by technology is vital for cultural production and exports;
- Market analyses in various fields and export areas are required for the development of the international dimension of cultural exports. Approaches differ in different branches of the arts and culture and in different markets.

Music; the music branch and the music industry ¹⁴⁷

Finland's internationally active music industry is relatively young compared with that of many other European countries. So far, the branch has evolved mainly on the strength of the domestic market and the efforts of the companies in the sector. Unlike many other European countries, Finland has not provided systematic subsidies or development assistance to companies in the music industry.

However, increased professionalism, an ongoing generation shift and the global approach brought by new communications media, together with original content, have already generated a number of international success stories such as HIM, Värttinä, The Rasmus, Nightwish, Bomfunk MCs, Darude and many other representatives of a variety of musical styles, each with their own aims and ambitions in internationalization. They have been important not only for the development of the music branch but for a segment of industry broader than just the music industry. Over the past ten years, particularly since 2000, the number of successes has been considerable in view of the size of the population base from which they emerge. Success on the charts is thus due mainly to work done by artists and their representatives, Finnish record labels and publishers. ⁵⁹

Subsidies from organizations within the branch has been important. The Finnish Music Promotion Centre (ESEK) and the Foundation for the Promotion of Finnish Music (LUSES) give out export subsidies in the form of grants and prizes to the tune of about EUR 209,000 annually. These are paid out of funds collected within the branch from its own revenue; they are very small compared with the volume and production subsidy needs of the sector, though. The subsidies are mainly allocated to recording production, touring and musician training. Neither of the above two funds has the resources to set up a fund for international sales, networking of music professionals or long-term marketing.

The Finnish Music Information Centre (FIMIC), which operates under the Finnish Composers'

Copyright Society Teosto, publishes material on Finnish music and composers, maintains a website on Finnish music and musicians, participates actively in international music events and makes contact with festival organizers, musicians, managers and journalists. Teosto subsidizes exports of Finnish music by awarding operating grants for the promotion of Finnish music to its member organizations, the Society of Finnish Composers, the Guild of Light Music Composers and Authors of Finland (Elvis) and the Finnish Music Publishers' Association.⁶⁰

Music Export Finland (Musex) was launched in December 2002. It is an export ring administered by Finpro ry. and consisting of record companies and publishers. Major organizations in the branch are also involved. The export ring model is temporary (maximum duration three years), however; furthermore, it only represents the exports of its members and is thus too restricted a structure for export promotion in the music industry in general. All the major actors in the branch — the Finnish Group of the IFPI (ÄKT), IndieCo ry., the Finnish Musicians' Association, Teosto, the Finnish Music Publishers' Association, Elvis — have entered into an agreement of intent to set up an operating structure modelled on European export agencies, to act in the long term and as broadly as possible so that export efforts could continue once the subsidy from the Ministry of Trade and Industry for the export ring project ends.

Music Export Finland represents a wide range of music from jazz to pop, rock, metal, electronic music and world music. Its aim is to develop and enhance the capabilities and operating environments of Finnish companies and production units in the music sector. It activates and consults with Finnish companies in the music sector, brokers export productions, conducts market research, produces joint promotional materials (electronic and non-electronic), offers personal sales services, increases international awareness of Finnish music and its members, enhances and develops international networking among Finnish companies and sets up efficient sales opportunities for Finnish companies. The most effective of these are trade

fairs, where the aim is to create large sales and showcase displays that will have a decisive effect on sales throughout the branch in Finland.

The main target areas are continental Europe, the British Isles, the Nordic countries and, in individual projects, Japan and the USA. The major annual business-to-business event is the Midem International Music Market held in Cannes, France. Each year, the focus is on one country. The theme country is given responsibility for organizing the main feature of the event, the opening night and concert. The theme country receives a wealth of publicity in the media and among professionals in the branch. Reed Midem, the organizers, have invited Finland to submit a bid for the opening night for 2006 or 2007. However, as has been the case with other European opening-night productions, funding for such an effort will require extensive support from the public sector in addition to the contributions of the music branch.⁶¹

The importance of music exports

Making the charts in the largest export markets in the world generates a considerable income flow to Finland in all sectors of income generation, increases the culture know-how of Finnish creators and producers, and brings a significant image boost to Finnish culture. Successes have knock-on effects on other branches of industry and culture, and they create jobs on the domestic market. One major export project can involve a team of anything from two dozen people to several hundred, including those employed indirectly. The music branch overall employed some 4,400 persons in 2001.

The value chain in the music branch begins at the creative phase, continues through the performance and development phase and the production and packaging phase, concluding with the marketing and distribution phase. Exports generate revenue in three different areas: 1) product sales (exports of recordings and other products, and licensing agreements); 2) service sales (appearances abroad by artists, music video production); 3) copyright royalties. A study on the overall value of Finnish music exports, published in September 2003, showed that the value of these exports has

increased by a factor of five between 1999 and 2001. The overall value in 2001 was EUR 15.5 million.⁵⁹ In 2003, Teosto paid out royalties to Finnish copyright holders on performances in 41 different countries. These royalties totalled EUR 2.7 million, an increase of 9.9% on the previous year. Abroad, Finnish music is performed the most in Sweden, Germany and Britain.⁶³

The measure of success is not only in chart rankings and sales numbers but also in the achievement of set targets and the implementation of an artist's long-term career plan, i.e. the strategic development of the artist's own brand. In several genres in the music branch, the most feasible measure of success is a long career featuring several albums and productions, employing not only the artist himself but an extensive team from managers and agents to recording producers.

Performances, events, expertise and recordings are sub-sections of the music branch. International operations constitute a significant source of income for musicians.

SWOT analysis of the music branch

The strengths of the Finnish music branch are Finnish culture and language, high-quality music education, a high level of artistic and technical competence, high domesticity of the recording market, low recording production costs, the high social status of concert music, the wide variety and originality of Finnish popular music, and an advanced copyright legislation and administration,⁶⁴ albeit copyright legislation is urgently in need of reform.

Weaknesses include the small market for recordings, limited production resources, lack of competence in commercialization and marketing, and geographical remoteness.

Opportunities can be found in the psychological and financial knock-on effects of successful music exports, increased demand for live performances of Finnish music, new distribution channels and formats, cooperation between publishers and record companies across corporate borders, and Music Export Finland.

Threats exist in the form of the loss of artist

capital and expertise in the music branch to other countries, bootlegging in neighbouring countries, illegal downloads over the Internet and the shifts these cause in consumer attitudes and habits, concentration of distribution channels and their acquisition by foreign owners, loss of plurality in the music supply, particularly in the field of popular music, fewer and more concentrated opportunities for live music, and erosion of legislative protection and cultural subsidies.⁶⁴

Competition on the international market is excruciating, and attracting the interest of professionals to a Finnish artist and company requires significant efforts in marketing communications and sales promotion. At the moment, Finnish companies do not have the resources to create tools necessary for exports (e.g. two or three different music videos according to the demands of different markets) or to send artists to the target markets for presentations.⁵⁹

Investments in Finnish musical education, which is of high quality in the international context, and in training in the music branch will not produce results if Finnish professionals are unable to exploit this education and training in the international arena.^{xvi} More and more successful Finnish artists have sought out foreign companies to further their careers, and the experience, networks and income thereby created do not come back to Finland. This weakens the potential for Finnish companies to work with existing or new artists.⁵⁹

In most European countries, export promotion in the music industry has an established and important niche in the government's export promotion efforts. In Sweden, the industry's success has been aided by the networking and extensive public support for export structures and joint export projects typical of Sweden. The success of Swedish artists and bands has had an enormous impact on the image of Sweden in general, awareness of Sweden and Sweden's other export industries.⁵⁹ In Norway, joint export projects have received significant export promotion subsidies, and in early 2004 export efforts were awarded a statutory subsidy of at least NOK 2 million per year. The French government has been subsidizing

exports of French music heavily for the past 30 years, and this investment has clearly paid off considering that sales of French music abroad have increased by a factor of 26 during that time.⁶⁵

Pop and rock

Promoting exports of pop and rock, like jazz, world music and other genres of popular music, together with the facet of classical music related to the recording industry, are closely linked to the general development of the business environment of the music branch and the music industry and joint export efforts.

The main export markets are in the Nordic countries and the German language area in Europe, as well as in Britain and southern Europe. Copyright royalties show that Finnish music is performed the most frequently, relatively speaking, in the Nordic countries. However, German-speaking Europe and Britain are emerging as the main target markets.

Tusovka ry. is an association founded in December 1998 to promote Russian popular culture in Finland. The association mainly imports Russian performers and films, focusing on quality. It is thus not being Russian that is important; the aim is to bring excellent and original Russian bands and other groups to Finland.

Joensuun Popmuusikot ry. (Joensuu pop musicians) is an association running a three-year Interreg III A project with EU financing in Karelia. The Rockbridge project involves organizing concerts in Joensuu in Finland and in Petrozavodsk in Russian Karelia. The project will run until the end of 2006.

Classical music

Finnish classical music has been doing well internationally for quite some time. Exports have largely consisted of works by Finnish composers performed abroad, Finnish performers collaborating with international agencies, and large-scale orchestra

tours and other subsidized performances involving public funding.⁵⁹ The structures were set up a long time ago, the cooperation in the field is established and works well.⁶⁶ 'Finnish music' is understood as a seal of quality; in 2003, members of the Association of Finnish Symphony Orchestras gave 90 concerts abroad.

Fazer Artists' Management Inc. has organized several foreign tours and has specialized in being an artist agency and the Finnish manager of a large number of foreign classical musicians and a smaller group of Finnish performers.

The Finnish Radio Symphony Orchestra promotes Finnish music through its repertoire selections, by commissioning new works from Finnish composers every year, and by showcasing top Finnish performers. The orchestra's tour repertoire consists largely of Finnish music and core international orchestral repertoire. Tour concerts are broadcast to wide audiences in several European countries, sometimes live (usually as a joint broadcast with the national broadcasting company of the host country), sometimes as a delayed broadcast through EBU programme exchange. The orchestra has appeared in 26 countries on 66 tours in Europe, the Far East, the USA and Australia. The Helsinki Philharmonic Orchestra, the Ostrobothnian Chamber Orchestra and the Avant! Chamber Orchestra have also toured abroad with success.

The extensive international cooperation of the Sibelius Academy involves student exchange, foreign tours, study trips, competition participation, organizational activities and various projects.¹⁴³

Jazz

Finnish jazz is of the very highest quality internationally, so a product for cultural exports already exists. With a few years of long-term investment, jazz exports could become a significant part of Finnish music exports, cultural life and image. Finnish jazz ensembles have received increasing attention in international jazz periodicals,

and success in international competitions is becoming more of a rule than an exception. The greatest commercial potential lies in jazz music as content; as visibility grows and the audience base increases, the commercial weight of performances, production and agencies will increase also.

The main actors in jazz exports are the Finnish Broadcasting Company, which has been making a significant contribution in this respect through the EBU for decades, FIMIC, the Finnish Jazz Federation, individual musicians and jazz ensembles, the UMO Jazz Orchestra, individual jazz producers and managers, and, as resources allow, the Sibelius Academy and the Helsinki Pop & Jazz Conservatory through their international student and teacher exchange programmes.

The Finnish Jazz Federation is the umbrella organization for Finnish jazz. Its purpose is to promote jazz music and to safeguard the interests of jazz in Finland. Its 40+ member organizations act independently. The most prominent of its activities is organizing domestic tours, but it also undertakes international cooperation; it belongs to a Nordic jazz network maintained through annual seminars and projects. The Federation has a development strategy for 2003-2006, focusing on the need to invest in international operations. A lack of resources is hampering networking at the moment.

The annual budget of the Finnish Jazz Federation was about EUR 390,000 in 2003. Subsidies accounted for 66.27% of the budget. The appropriation for international activities was EUR 5,300 due to a shortage of resources. This figure is minimal compared with other Nordic countries. In Norway, for example, jazz music receives subsidies totalling NOK 26 million annually (2002), of which the Norwegian jazz forum allocates about NOK 1,200,000 for international operations.

Jazz music exports suffer from a lack of marketing and an international network too rudimentary in view of the demand, for instance in organizing concerts. The availability of records is also poor, i.e. the distribution network is inefficient, and this makes it difficult to sell gigs abroad and to increase awareness. More capable producers and managers are also needed in the field of jazz, as the making of

contacts rests largely on the efforts of jazz musicians themselves at the moment.¹⁴⁴

Folk music

Dozens of folk music, world music and ethnic music albums are produced every year in Finland, most of them for export. Finnish international ethnic music rests on a foundation of national characteristics; the idiom or appearance of the most popular groups demonstrate our northern geographical location or mythical cultural history, although modern Finland is present too in the excellent command of sound and lighting technology.

Finnish folk music exports are the result of joint efforts by various actors. Artist management is of paramount importance, as in all genres of popular music. The recording industry plays another major role. The major record labels are Aito Records, DAT, Finlandia Records / Innovator Series, the Folk Music Institute, the World Music Centre, OArt, Olarin musiikki, Ondine, Pilfink Records, Rockadillo Records, the Folk Music Department of the Sibelius Academy and Texicalli Records. Digelius Music, which deals in record exports and international trade, is a major player that has been in the field for a long time.

FIMIC actively promotes folk music exports. The international networks of the music institutes – the Folk Music Institute, the World Music Centre, the Finnish Accordion Institute, the Rytmi Institute and the Institute of Finland-Swedish Traditional Music – also help promote exports of Finnish folk music.

The Folk Music Department of the Sibelius Academy has been in existence for 20 years, creating a sound basis for professional folk music. It is an active partner in the European Network for Traditional Music and Dance (ENTMD). This network undertakes a variety of promotional activities such as organizing tours and releasing publications.

The major Finnish folk music festivals such as Kaustinen bring a large number of international

journalists to listen to Finnish folk music.

The Finnish Folk Music Association (SKML) is Finland's largest folk music organization, with 18 member organizations in Finland. Its international activity consists mostly of work within the Nordic folk music committee. The Finland-Swedish Fiddler Society (FSSF) is the other Finnish member of the committee. The committee runs various export-promotion projects such as tours of the Nordic countries and neighbouring areas, a children's folk music camp, a joint website www.folknorth.org and a joint presence at international trade fairs.

Folklore Suomi Finland, set up as a coordinating body for the major folk dance and folk music organizations and festivals, conveys festival invitations to Finnish folk dance and folk music groups and provides correspondence and communications services in relation to festival tours. The association also distributes information on Finnish groups to event organizers around the world. The association caters to Finnish folk dance and folk music events by distributing information and material on foreign groups and by passing on invitations to them. Folklore Suomi Finland represents Finland in the international organizations of the field, the Conseil International des Organisations de Festivals de Folklore et d'Arts Traditionnels (CIOFF) and the Internationale Organisation für Volkskunst (IOV), and also acts as the national committee for these organizations. Dozens of folk dance and folk music groups belonging to member organizations of Folklore Suomi Finland appear at international festivals every year. Some of them receive an invitation through the association, some through their own organization and some through their own contacts.⁶⁷

Finnish amateur singers and instrumentalists have benefited from membership of the Finnish Amateur Musicians' Association (Sulasol) in various Nordic and international organizations.⁶⁸

The Central Union of Finnish Folk Music is a coordinating body for folk dance and folk music organizations in Finland. Its activities include selecting overall themes for each year and conducting joint projects. The Union is Finland's national committee of the International Council for

Traditional Music (ICTM), to which it reports annually on ethnomusicological research in Finland, events and current issues in folk music.¹⁴⁵

Opera

Opera is a European art form born over 400 years ago. It has always involved an exchange of cultural products and meanings. Opera has never cared about national borders; conductors, dancers, singers and directors in the genre have always worked internationally. Even when borders have been politically closed, they have been open to artists. Traditionally, cultural exports involve international performances of works and continuous guest appearances by artists such as composers, conductors, singers, dancers, instrumentalists, choreographers, set designers and costume designers in various countries and cultures.

A new form of cultural exports in this genre involves joint productions by several institutions and production rental and purchase both within a country and between countries. The advantages of networking and cooperation between opera houses are obvious not only for the productions but for publicity too. For instance, renting the production of Rossini's *Il viaggio a Reims*, produced at the Finnish National Opera in autumn 2003, to the Genoa Opera in Italy increased awareness of Finland and of the Finnish National Opera. The joint production of the ballet *Raymonda* by the Finnish National Ballet and the American Ballet Theatre, which will be premiered in New York in May 2004, has also attracted international attention.

In such cooperation, challenges are posed by different working habits and labour costs in different countries, joint ownership of productions and cultural differences in working practices and communication. Because of this, constant communication and interaction between partners is essential in joint productions. It is also a challenge to create a production that will suit different theatres, cultures and repertoires. Another benefit in addition to publicity is the chance to learn from how things are done elsewhere and notice that

there are many ‘right’ ways to do something. This enriches domestic productions and yields real alternatives for thought and work. It is important, however, to keep the ratio of joint productions to independent productions in balance so as not to jeopardize the originality and identity of one’s own institution. A balanced range of own productions, joint productions and rented productions furthers artistic goals, production goals and economic goals.

The Finnish National Opera has lent its expertise abroad in the form of consultant help given to the USA, various European countries and the Nordic countries in cases where an opera company moves from an old opera house to a new one. The Finnish National Opera has ten years of experience in reforming its entire organization when moving to a new opera house.

As further examples of new types of cultural exports we might mention radio and TV recordings, DVD recordings and transmissions. The Finnish Broadcasting Company is one of the main partners of the German-French ARTE TV channel, the other major partners being the national broadcasting companies of Poland, Belgium, Austria and Switzerland. Finland’s participation in ARTE was made possible by the Savonlinna Opera Festival’s production of Merikanto’s opera *Juha* and the Finnish National Opera’s production of Rossini’s *Il viaggio a Reims*, which ARTE took an interest in broadcasting.¹⁴⁶

Recommendations for action in the music branch

1) Safeguard the basic operating environment for companies and actors in the music branch:

- Ensure copyright protection through legislation in new distribution and use systems;
- Modernize the VAT system;
- Allocate public subsidies towards the achievement of a more comprehensive recording selection of new Finnish music.

2) Structural development:

- Aim export efforts and public subsidies for them at companies that work with artists;

- Develop the international marketing and communications competence of music professionals, and improve structures in the branch; ensure the future of Music Export Finland, which coordinates joint export efforts and develops export promotions;
- Develop the fundamentals of the organizations and structures that further music exports, draw up common strategies and consult experts (e.g. embassies, foreign affairs administration, cultural institutes, etc.);
- Support existing export organizations (FIMIC, Finnish Jazz Federation, etc.);
- Safeguard the operating environment of export and production agencies and improve the management business; increase professional competence and international networking for example through participation in international export events.

3) Operative measures:

- Support joint export projects and joint export showcases in the music branch:
 - 6-10 showcases of Finnish artists at major export events annually;
 - Joint export showcases in major musical centres;
 - Support for promotional tours;
- Support production of major promotional tools:
 - Producing an annual promotional collection and artist presentations in each genre of music: rock/pop, metal, jazz, world music, electronic music;
 - Support production of audiovisual promotional tools intended primarily for export;
- A single extensive project: allocate subsidies for ensuring that Finland will be the theme country at the Midem trade fair in 2006 or 2007;
- Complement the network with additional resources: a cultural export fund to which commercial actors too can apply, to be applied for like an artist grant for 3 to 5 years on the basis of an export plan, channelled to existing actors and/or directly to individual projects.

Literature

Anglo-Saxon literature overwhelmingly dominates the global literature market. Most of the literature translated into local languages anywhere in the world comes from that language area. Also, an increasing number of Europeans are reading Anglo-American literature in the original language; the Nordic market for literature in English already exceeds that of Australia in size. At the same time, the book markets in Britain and North America are very much closed. Translated fiction accounts for less than 2% of the fiction published in these countries.

In such a commercially imbalanced market, translated literature must be subsidized with national funding. The international book markets in the European countries are largely alike, with similar print runs. In France, for example, 4,000 copies sold is considered a good result. Poetry collections usually have a print run of 400 to 1,000 copies. Sales figures are impossible to obtain, so the only statistically significant information on Finnish literature exports consists of the number of translations of Finnish literature published abroad. Between 2001 and 2003, a total of 510 Finnish works, or extracts of works in anthologies, were published in other languages.

The turnover of book publishing in Europe totalled EUR 19 billion in 2000, 6 billion more than that of the music industry. Obviously, literature is one of the most profitable branches of the cultural industry in Europe, together with music and film.

The Finnish Literature Information Centre (FILI) was founded in 1977 to promote and subsidize the publishing and publicizing of Finnish, Finnish-Swedish and Sámi literature abroad.

The *Books from Finland* periodical was launched in 1967, and it acquired its present form in 1976. It was previously published by Helsinki University Library and is now (since 2002) published by the Finnish Literature Society (SKS). It is an independent literary quarterly in English presenting a variety of Finnish fiction and non-fiction. The periodical is read by publishers, universities and cultural

organizations abroad. Government subsidies for Books from Finland have remained at the same level since the early 1990s, and thus its marketing and promotion have been negligible.

Over the past three years, FILI has actively sought international financing for projects, the most important of these being the Network North project implemented with funding from the Nordic Council of Ministers; its purpose is to promote awareness of Nordic literature in the British Isles, particularly Scotland, Wales, Northern Ireland and the Republic of Ireland.

Another important international project is the multiannual Literature Across Frontiers under the *Kulttuurin 2000* programme. FILI is one of the three main participants in this project, which is coordinated by the University of Wales.

Translation subsidies are granted to foreign publishers. Without such subsidies, foreign publishers would never take up books from small language areas. Even large countries subsidize translations of their literature into other languages; for example, the annual budget for the French translation programme was EUR 1,345,500 at the turn of the millennium.

Translation subsidies constitute a vital element in the process and a necessity for literature exports from any country. This element becomes all the more important the smaller the language area is — an internationally widely recognized and acknowledged fact. Nearly all translation subsidies go to fiction. Exports of Finnish non-fiction are all but non-existent, and there is a proposal for a three-year 'Finnish non-fiction out into the world' project from the beginning of 2005. Exports of children's and young people's literature form another problem area and subject for development; a separate three-year project from the beginning of 2005 is likewise being proposed.

Literature export processes last a long time and are based on cooperation among and expertise on a number of actors, plus the existence of translation subsidies and other subsidies.

Exports of literature from small language areas are dependent on translators. Not a single country has enough translators, and indeed in many important

target countries there are no translators available who are native speakers of the language(s) of the target country. Spain and Portugal are such countries. A great many translators are nearing retirement, too.

FILI provides support and further training for translators. Biennial seminars are organized, in alternate years for young translators (with CIMO and UKAN, lasting two weeks) and translators of Finnish-Swedish literature. FILI has translation support software with a number of language pairs, enabling the organization of bilateral translation seminars. One such will be organized as a pilot project with FILI's Polish sister organization in Cracow in summer 2004.

FILI also awards visitor scholarships for one or two weeks, and some 12 to 15 translators visit Finland every year on these.

FILI also organizes international literature projects under bilateral cultural exchange agreements; Finnish authors participating in literary events, trade fairs and exhibitions, and the organizing of translator seminars. The number of visits has increased from 75 in 1998 to 117 in 2003, and that of subsidized visits and professional trips has increased from 131 in 1998 to 175 in 2003.

Together with NORLA of Norway, FILI is cited as an excellent example in the recent assessment of Swedish cultural exports.⁶⁹

The main foreign networks consist of FILI's sister organizations in the Nordic countries and beyond, and foreign universities that teach Finnish.

FILI has entered into cooperation with UNESCO in a pilot project involving African-Finnish-Swedish poetry translations. The translation and publishing project for a children's Kalevala in Arabic was launched in spring 2004.¹⁴⁸

Recommendations for action:

- Set up two three-year development projects for FILI, 'Finnish non-fiction out into the world' 2005-2007 and 'Children's and young people's literature out into the world' 2005-2007;
- Subsidize the FILI literature computerization project of.

Comics

Comic strips have acquired new distribution channels in addition to the traditional ones — albums, comic books and newspapers — in recent years, such as online electronic distribution and CD-ROMs. Exhibitions and gallery displays are also increasing considerably.

Hundreds of cartoonists participate in the Kemi Nordic Comics Festival every year.

The purpose of World Comics Finland is to promote the creation in Finland of comics based on various cultures, to increase international contacts of cartoonists, and to promote the use of comics as a form of communication in internationalization education, development projects and intercultural communication. Most significantly, the association has organized workshops with Finnish teachers together with local NGOs in Asia and Africa to promote the use of comics for utilitarian and campaign purposes.⁷⁰

The problem in this branch is that many of the albums published do not find a market or readers because they are scarcely marketed at all. There are creators and producers, but few publishers are willing to invest in marketing Finnish comics.

In the other Nordic countries, comics are considered a genre of literature, whereas in Finland the genre is administratively classified with design. This results in stiff competition and quota-setting in the National Council for Design, with comics competing with other, completely unrelated genres. Sweden, Norway and Denmark also have special comics subsidies.¹⁴⁹

Recommendation for action:

- Transfer comics from design to literature in the Finnish arts administration.

Visual arts

In Finnish contemporary art, photography and video as well as cross-genre fringe works have emerged alongside traditional genres. As the nature of art has changed, artists are developing interests in long-term joint projects, environmental art, installation art and media-based and technology-based art that require more production resources. In these genres, Finnish contemporary art is internationally acknowledged as innovative and original.

Finnish contemporary art has only really established itself internationally since the 1990s. Today, direct contacts and extrovert activities of artists, institutions and organizations are only natural, and the potential for an international career in the arts has improved considerably. Most Finnish artists study or work abroad for extended periods of time at some point in their careers. Joint projects between Finland and other countries have increased enormously, particularly through networking within the European Union. The limitations posed by Finland's geographical location on one hand and the rapid expansion of interaction on the other, underline the need for subsidies for international activities.

The long line of ARS exhibitions beginning in the 1960s has laid the foundation for internationalization in Finnish contemporary art. The role of KIASMA, the Museum of Contemporary Art, in the internationalization of Finnish contemporary art and exports has been of decisive importance. In a short space of time, and mainly due to the ARS 01 exhibition, KIASMA has become an international brand.

Finland has a handful of galleries undertaking exports of contemporary art, such as Galleria Anhava and Galleria Krista Mikkola. The Ministry of Trade and Industry has discontinued its subsidies to galleries. What is important for the international activities of galleries is to have a presence and visibility at trade fairs. Running a gallery is a long-term expert occupation. Cultural export subsidies should be extended to galleries too.

Another problem is that the State Council for

the Purchase of Works of Art does not buy works from galleries. The VAT rate on visual arts is also higher than in many other countries. A fund is needed for financing projects requiring planning for a period longer than a calendar year.

L'Association Internationale pour la Biennale des Jeunes Créateurs d'Europe et de la Méditerranée (BJCEM) is a network for young artists involving 20 countries and covering visual arts, film, dance, music and theatre. The Balkan states and the Mediterranean are well represented. Participation in biennales and trade fairs requires subsidies for travel and networking.

The Finnish Fund for Art Exchange (FRAME), subsidized by the Ministry of Education, was launched in 1993 to create and maintain international cultural relations. The centre awards project grants for international exhibitions by artists and for the publishing of printed matter presenting artists' work in foreign languages, provides financial and professional support for projects implemented by other parties, produces and publishes material on its own and in cooperation with other Finnish and international parties, and provides expert and coordination assistance to artists and partners. The centre has expanded considerably in ten years; in 1993, FRAME subsidized or was involved in 16 projects in 7 countries, but in 2003 there were 164 completed or ongoing projects in 38 countries. The key in this subsidy system is a wide range of functions and cooperation with numerous actors in the visual arts branch. The most important of these are the Promotion Centre for Audiovisual Culture (AVEK), the Distribution Centre for Finnish Media Art (AV-arkki), the Helsinki International Artists Programme (HIAP), the Arts Council of Finland and its sub-committees, art museums, the Museum of Photography, art galleries and their organizations, the Academy of Fine Art and the Taik gallery of the University of Art and Design Helsinki, and the Nordic Institute of Contemporary Art (NIFCA). Special emphasis is given to the development of joint projects from international initiatives in order to activate and maintain international interest.

Finnish or international exhibitions jointly

produced by FRAME and arts institutions or organizations constitute an important development objective for the near future. Potential project-specific partners include Finnish or foreign actors that have the technical and practical facilities for content design and organizational management. This also supports the forming of institutional connections between Finnish actors and foreign partners. FRAME should be provided with the resources for reciprocal activities, supporting international exhibitions in Finland.

The number of extensive reviews that have become important showcases for contemporary visual arts — biennales, triennales and other regular events — has increased rapidly in recent years, and their nature has changed too. Nationally focused reviews have been joined by worldwide exhibitions designed by acknowledged experts in contemporary art; these constitute the most important international meeting points for the arts world and attract considerable international attention. There are about 60 of these events at present, and they cover all continents. The presence of Finnish contemporary art in the most important international major exhibitions is of great importance for our cultural policy, and this new situation requires new types of action by Finland in order to increase and enhance contacts between Finnish arts and the arts world at large. An important point here is to create high-level guest programmes for foreign experts. Finland's geographical position can today be exploited more effectively in cooperation with partners in the other Nordic countries, in the Baltic states and in the St Petersburg region. It will be possible to expand cooperation in content development and in the sharing of expenses between the Finnish Ministry for Foreign Affairs, embassies, Finnish Institutes and various arts institutions and organizations.

One of the most urgent challenges lies in the artist-in-residence projects at present rapidly gaining in popularity for improving the working of artists, curators and critics abroad. In particular, we should set as a priority entry into residential programmes with selection processes involving international qualification assessment and exhibition

and/or publication for participants. We must also improve our capacity for reciprocity, i.e. for receiving foreign artists, curators and critics on visits to Finland.

It would be particularly important for boosting the commercial potential of the visual arts to provide separate funding to support long-term participation of Finnish galleries in the major international art fairs.¹⁵⁰

Photography

Finnish contemporary photography is a successful and important cultural product. Finnish photography is appreciated for its quality, and it has a growing market. This new market potential is not due solely to Finnish export subsidies, but also to foreign financing and purchasers of photographs.

There is a long tradition of internationalization in Finnish photography. Before photography became a professional art form, it was important to participate in international competitions to gain an international classification such as ARPS. This tradition still continues, mostly among studio photography professionals. Earlier, Finnish photography was mainly exported by embassies for the purpose of creating an image of Finland — nature photos and photos of Finnish architecture and design. These were mostly individual commissions, but the nature photo exhibitions of Antero Takala, for instance, toured hundreds of exhibitions through the efforts of embassies.

Since the 1980s, photography has gained a foothold in galleries and museums, and as a result, exports of photographic art have become increasingly professional. Pentti Sammallahti and Esko Männikkö were pioneers in this respect. The Professional Studies programme at the University of Art and Design Helsinki, with Timothy Persons, has trained dozens of high-quality photographers attracting international interest, including Elina Brotherus and Pertti Kekarainen.

In addition to graduates of the Department of Photography at the University of Art and Design Helsinki, there are several photographic artists who

sell their work at leading galleries in Paris and New York. We must also not forget the twenty-odd photographic artists who exhibit abroad regularly, even if not every year. In all, works by at least 50 Finnish photographic artists move on the international market every year.

The internationalization of Finnish photographic art has largely depended on support provided by the Arts Council of Finland in the form of travel grants and project grants. Annual grants give artists the opportunity to focus on international exhibitions for an extended period of time.

The role of the FRAME exhibition exchange centre has been crucial to exports of photographic art. The Museum of Photography cooperates with other museums, and the Association of Photographic Artists supports international exhibitions, particularly those involving more than one artist.

It would be important for the internationalization of Finnish photographic art to have more resources allocated to FRAME. The simplest way to do this would be to divert funds and staff intended for international activities from the Ministry of Education and the Ministry for Foreign Affairs to FRAME. The problem with Finnish arts exports at the moment is heterogeneity; there are too many parties involved. Not all embassies have staff competent to handle professional cultural exports, and regrettably often it is the artist who ends up covering the expenses.

There is a genuine demand for Finnish photographic art. This means that the bill will be paid by foreign parties, such as art buyers, galleries and museums. Without support from the Finnish government, exports will not develop. This is why the potential for the Ministry of Trade and Industry to support exports of photographic art is also important.¹⁵¹

Recommendations for action:

- Develop participation in international residences within the Finnish Mobility project launched by FRAME, the Helsinki International Artist Programme (HIAP) and the Academy of Fine Arts;

- Enhance international public relations by consolidating the publication of the English-language arts periodical *Framework* and by expanding international publication cooperation, by supporting the production of high-quality presentation material, by improving electronic PR and by supporting the PR and marketing projects of various organizations;
- Provide separate allocations for art galleries and other actors to participate in international trade fairs.

Media arts, digital content and games

Digital content production and media art¹⁸³

Finnish digital content production and media art are both known and acknowledged internationally. There is considerable cultural industry potential for growth in this interest. The internationally conspicuous position of media art is due largely to the extremely well profiled and networked activities of actors in the field and to the contacts and joint productions of certain individuals.⁷¹ However, only about 10% of companies in this branch gain over half their turnover from international activities.⁷²

The branch of digital content production and media art is heterogeneous, and the actors' modes of working are highly diverse. Most actors and artists operate through small companies as in the film industry, while others, particularly in the early stages of their careers, are private entrepreneurs rather like visual artists. Productions are generated as cross-discipline teamwork projects, and thus good contacts between the different disciplines (artists, technicians, producers) are important to ensure a high quality of work and successful distribution.

Education in the branch of digital content production and media art is secured, and the international mobility of graduate artists through

residence programmes, for instance, is also on a firm basis.

Mobility is typical for the media branch. This is partly due to rapid technical developments in its presentation facilities. Discretionary financing thus suits media art very well. On the other hand, the basic structures of this genre are still in their infancy and require special attention.

Financing for digital content production and media art consists of bits and pieces; foreign financing or corporate financing is essential for more extensive productions. This, in turn, requires advanced productization. Media art in Finland has been financed by the Arts Council of Finland and also by the Promotion Centre for Audiovisual Culture (AVEK), whose support for multimedia and media art productions totalled EUR 380,000 in 2002-2004. This is approximately equal to the budget of two major productions of international calibre. AVEK gains its funds almost exclusively from copyright revenue (the 'cassette fee').

The international distribution and exchange of media art has been influenced by FRAME, AVEK, the Nordic Institute for Contemporary Art (NIFCA) and the Finnish Institutes abroad, particularly those in London, Paris and Tokyo. Important organizations in the branch include the media culture association *m-cult ry*, *MUU ry*, the Distribution Centre for Finnish Media Art (AV-arkki), the Computer Arts Centre in Espoo (CARTES), the media art associations *Avanto* and *katastro.fi*, and a variety of cooperatives and communities such as *Aula*.⁷¹ Important domestic venues include *Kiasma*, *Media Centre LUME* and the *Avanto* and *View* festivals. National competitions include *Mindtrek*, *Vuoden Huiput* and *Media & Message*, while *Prix Möbius Nordica* is an important international competition.

AV-arkki is a non-profit organization founded by artists in 1989. Its membership consists of about 100 Finnish media artists. Its purpose is to distribute and archive media art created by its members — video, computer and film works, installations and CD-ROMs.

The main task of AV-arkki is to distribute Finnish media art and experimental films to festivals, events,

museums and galleries, mainly internationally. The association offers works by individual artists, complete exhibitions and expertise for joint projects. AV-arkki is also an archive available by agreement to curators, researchers, teachers, critics and artists. AV-arkki organizes demonstrations and exhibitions on Finnish and international media art in cooperation with other actors. Every year, AV-arkki organizes the *View* festival in Helsinki, a review of Finnish media art presenting all new works that have entered distribution during the year, as cinema screenings and as installation exhibitions. In 2003, works by 81 artists were presented, and 77% of the 118 venues were international. Distribution involved 27 countries.

The main part of communication takes place over the Internet through specialized websites, international e-mail lists and online fora formed by groups of artists. Internationalization involves presenting works or productions translated into various languages on international fora, licensing or localizing programmes for various countries, and undertaking long-term publicity, marketing and distribution.

The main markets at the moment are Sweden and Britain. Partnerships in neighbouring areas, particularly Estonia, are being forged in product development.⁷² Growth abroad is sought cautiously, focusing above all on existing networks.

The weakness of the Finnish media culture is in the underdeveloped nature of its infrastructure and the local environment.⁷³ Financing usually comes in bits and pieces from numerous sources, which makes it difficult to undertake long-term development or to create large productions. There is very little money available for packaging, marketing and distributing completed works or productions. Resources should be allocated to developing the production skills of media artists and the forms of cooperation available with producers in the branch. Media art requires a business approach to turn into a cultural industry and requires a support structure of its own.

Finland lacks a university-level media art training unit that would combine theory, practice and research. As the teaching at the moment is

concentrated in polytechnics, research expertise fails and investments are lost as there are no opportunities for further development or post-graduate research, production or international job training.⁷¹

As opportunities in this branch it is worth pointing out games, which are becoming a strong export genre, cultural products with a new type of narrative, media artworks, advanced socially or culturally structured online services and products, and above all the expertise related to interaction and innovative interfaces in itself. Mobile services are expected to grow into one of the most significant sources of income in the branch by 2006.⁷² The plan to set up a Nordic multimedia fund is also promising.⁷⁴

The worst threat is one where trained Finns find themselves mainly localizing foreign content for terminal devices as the production itself is relocated to countries with cheaper labour. Even now, talented artists are moving abroad in search of better production environments or for other reasons. Creating extensive works or productions requires foreign financing, but in such cases the revenue remains abroad.

A professional environment is required to attract both Finnish and foreign talent. Limiting exported websites to English may also prove to be a restricting factor in exports.

Canada has an active policy to create new opportunities without waiting for initiatives from the field. In 2002, funding for media art totalled EUR 8.22 million, half of which went to individual media artists or groups and the other half to organizations supporting production, R&D and distribution in media art. The Digital Arts Network in the Canada Council constantly monitors the development of media art and makes submissions for policy decisions. This model has been found feasible not only in Canada but in the Netherlands, too. The Bell Globe Media fund, by comparison, proceeds from the responsibility of a company with a strong market position in the Internet and wireless network business to develop independent production in the branch. This could be considered in Finland too; telecommunications operators and

online service providers with a dominant market position could be required to purchase domestic content and to support research in the branch.

In **Australia**, the Australia Council awards EUR 1.5 million annually for media art projects. As in many countries, there is a lack of statistics, which is a weakness. Perceived threats include lagging behind in technological expertise due to a lack of training resources and the resistance to change in traditional art forms and production cultures.

In the **Netherlands**, media art production, research, development, communications and events are financed with a long-term, broad-based and extensive approach. The country is an international nexus for media art and culture and a leading media culture policy influence in the EU.⁷¹

Recommendations for action:

- Set up a Nordic media culture network to reinforce production and information exchange between organizations and artists;
- Provide funding for M-cult as an international research, development, production and information exchange organization;
- Organize archiving of media culture;
- Hire a presenter specializing in media art for the Ministry of Education with the duty of developing cooperation with other ministries and organizations;
- Set up a separate media art council.

Games

Games do not constitute a clearly defined product group; instead, they are a visual cultural interface where media and design processes intersect: music, design and the entertainment industry. Games and game-like approaches can be used in various applications such as cross-media games, simulators and rehabilitation equipment. Teaching can also be set in a game environment ('edutainment'). As players age, there will be increased demand for games with more profound content. Thus, games will continue to merge increasingly with the

entertainment and content industries and with utilitarian processes, which will ensure a wide range of development opportunities.

The reason for the rapid development of the game market is the diversification of product categories. At the moment, the game market is divided into console games, PC games, portable game devices, online games and wireless game devices. Of these, console games form the largest group. However, the largest growth potential is seen in online gaming and in portable and wireless game devices, the market for which is expected to grow at an annual rate of about 11%.⁷⁵

The turnover of the game industry has increased hugely, and on the global scale the game industry now outpaces the film industry in terms of volume. It is estimated that over one billion game products were sold in Europe alone between 1995 and 2002. In 2002, total sales on the game market were EUR 25 billion. The main game market areas are the USA, Japan and Europe, particularly Britain. The Finnish industry has taken a strong upward swing since the turn of the millennium, and as much as 90% of the turnover of game companies comes from exports.⁷⁶

China has also emerged as a major market due to the huge interest in online gaming there. Games are the most profitable Internet portal business in China today; last year, the volume of the online gaming market exceeded EUR 200 million. Unlike the music industry and the film industry, online gaming is unaffected by piracy. At the moment, 80% of the online games played in China are Korean, but domestic game production is growing too, because the Chinese Government is providing strong support to the ICT industry. Although domestic market growth is the dominant factor in China at the moment, it is possible that part of the development work on western games will be relocated to China in the future. Mobile gaming is only just emerging as a market, but China, with over 250 million mobile phone users, is set to become the world's second largest mobile gaming market after Japan. Of Finnish manufacturers, at least TraceBit and Sumea already have games available in China. The problem in game

development is that there are many mobile phone manufacturers and that games thus have to be designed in several different versions.⁷⁷

Game development did not exist in Finland before 1986. The emergence of Finland as a major producer of game entertainment has been rapid. The first Finnish game success came in 1986 with *Sanxion*, programmed by Stavros Fasoulas.

The strength of the Finnish game industry is in the ability of the Finnish education system to generate up-to-date expertise. It would be important for the development of this branch from the national point of view for more successful companies to emerge. Finland has a strong population of gamers, with potential for entrepreneurship. Also, the status of Nokia as a major telecommunications player supports the development of the game branch.

The problem is that the Finnish game industry is still very much embryonic. The companies are domestic in outlook and small; their average age is only 3.5 years, and they have 10 to 30 employees on average. Cautious estimates say that there were 400 to 420 people employed in the game industry in Finland in 2002. However, the market in the branch is global, and an important trend in the branch has been for companies to coalesce into huge 'super-developers' covering the entire production chain from development to sales. Finnish companies are geographically remote from the USA, which is where the publishing decisions are increasingly taken. It takes time to make a company profitable in this industry. The game branch requires more venture capital and 'business angels'. Networks should be expanded and enhanced. Actors in the branch also see a general lack of appreciation for their industry as a problem, and indeed it is hoped that the industry would gain in acceptance with the government, investors and the business world in general. Game and entertainment applications have already been included in the Tekes Fenix technology programme.⁷⁶

There is much that is amateurish in the branch, particularly in marketing. Game industry training is desired by actors in the branch. The lack of

business management skills is a problem in the game industry as in other industries. Increased risks due to increasing production costs also cause problems, particularly for small startup companies. Rapid technological development in the future is an opportunity but also a threat. Necessary investments are becoming heavier, and competent personnel may be in short supply.

Also, there are no production units of foreign game companies in Finland, probably because the industry in Finland is so young and the labour costs are so high. The role of publishers is heightened in the current structures of the industry, because the branch calls for extensive marketing, good brand management and much capital. There is also a danger of large corporations capturing the market, leaving no room for independent game developers. Intellectual property rights (IPR) issues in the ownership of game brands, and financing for demos and applications and for the development of rapid-reaction development instruments are also challenges in the game branch. There are also no game publishing companies in Finland apart from Nokia and WSOY, which produces edutainment game applications as components of a broader learning environment.

Globally, the game industry is threatened by economic downturns, tighter legislation on online gaming, concentration into the hands of a few large companies, delays in consumers picking up new things, inappropriate business models and a shortage of employees.

On the other hand, global opportunities may be identified in the increased growth of entertainment and games, the convergence of media types and new technologies, and the social acceptance of games. Finland and the other Nordic countries lead the world in technology and standard of living, and this should be exploited in the testing of new applications and ideas while creating Finnish and Nordic brands. Systems and networks enabling cooperation and information transfer should be created. The public sector could help in the development of international operations in particular.

According to Markku Markkula, there is potential

for success, particularly in the edutainment field. Competition is tough, however; products and services must be precisely focused. One way of finding a key position on the global market is to find products that complement other products already on the market.⁵²

Some Finnish games have already achieved global success. Max Payne, the most successful Finnish game to date, raised the Finnish game industry to the top of the field. The best-known product of Codetoys, the 'Who wants to be a millionaire?' SMS game, is estimated to be the most successful mobile game in the world. An example of a successful Finnish online game might be Habbo Hotel by Sulake Labs Oy, a virtual hotel where as many as 650,000 players from all around the world meet every month.⁷⁶

Recommendations for action:

- Strengthen structures in the branch;
- Seek out a functioning funding structure enabling the development and planning work that, characteristically for the industry, is required before a product can even be offered on the market;
- Create game industry training and strengthen the business management component in existing training.

Audiovisual arts

Film

Cultural exports of Finnish film are governed by the Finnish Film Foundation. Its purpose is to promote Finnish film and Finnish culture and to promote sales of films abroad. The objective is to have Finnish films performed at as many internationally important film festivals and other events abroad as possible. The audiences thus reached are an important addition to the annual total of viewers for Finnish films. A cultural export and marketing project for short films and documentaries, jointly managed by the Film Foundation and the

Promotion Centre for Audiovisual Culture (AVEK), has been operating at the international department of the Film Foundation since 1998.

There are many reasons for the international boom in Finnish film that began in the 1990s. Domestic successes have international repercussions. Festival distribution by the Film Foundation, Finland's EU membership and the network of Finnish Institutes abroad have helped profile Finnish film abroad in new ways.

Full-length feature films

The strengths of Finnish film are idiosyncratic culture, a strong and growing domestic market, high-quality documentary production and original 'art house' films which have potential for success on the international market too. *Mies vailla menneisyyttä* (The Man without a Past) by Aki Kaurismäki has been seen by over two million people around the world.

Exports of feature films are usually undertaken by production companies, agents or international distributors. Festival success and established contacts are of prime importance. International visibility and success for Finnish film require a professional and established distributor. Two internationally distinguished major distributors of quality films, Wild Bunch and Celluloid Dreams, have taken up two new Finnish films, *Hymypoika* (Young Gods) and *Lapsia ja aikuisia* (Producing Adults, to be premiered on September 17, 2004).

The weaknesses of Finnish film can be identified in a low level of public subsidies, which affects the supply of domestic films in terms of both quantity and quality. In Finland, the level of public subsidies for film is half or even less of what it is in the other Nordic countries, where increased public subsidies have encouraged private backers to invest in film too. A sufficient number of productions and production budgets enabling professional production values are essential for international success. The small size of Finnish production companies places further challenges on internationalization ambitions. In the other Nordic countries, production companies are considerably larger than in Finland,

and typically they produce several films per year.

Diversity and quality form the foundation of the success of Finnish film. These, in turn, require a sufficiently large number of films to be produced every year, allowing the time and resources required for developing and implementing the productions. The international success of Finnish films and exploitation of their export potential are dependent on the films being produced in a professional manner both artistically and practically speaking. Sufficient domestic basic funding will safeguard a diverse and high-quality output of Finnish films that will attract international interest too.

Documentaries and short films

Since 1998, exports of short films and documentaries financed by the Finnish Film Foundation and AVEK has been managed by the 'Short and documentary film cultural export and marketing project', which is intended to help producers and authors gain international visibility and thus improve the potential for obtaining international financing.

Proportional to the number of films completed, Finnish short films and documentaries attract even more interest abroad than Finnish feature films. Finnish documentaries are known as powerful and original, so much so that we might say they constitute an internationally acknowledged brand. Opportunities for screenings abroad are particularly important for short films, since through foreign festivals and TV broadcasts they can attain audiences larger than they ever could in Finland. Short films also have considerable artistic potential, as Eija-Liisa Ahtila and Mika Taanila, for instance, have demonstrated.

The cultural exportation project of the Finnish Film Foundation and AVEK has been a success. In recent years, Finnish short films and documentaries have had over 500 screenings annually at 150 to 200 film festivals or other film events abroad. Cultural exports have doubled over the past six years. However, the number of screenings is not an end in itself. A more important goal is to gain access for Finnish films to venues where they can reach

buyers, distributors, other important film festivals and talent scouts as effectively as possible. At the moment, international visibility is good considering how limited the resources available for cultural exports are. In 2003, the budget for the cultural export and marketing project described above was EUR 130,000.

The Tampere Film Festival is an international short film and documentary festival that also functions efficiently as a marketing and export channel. In 2003, the Festival had nearly 30,000 visitors at its over 120 screenings. The most popular series were the St Petersburg series, the Swedish patient histories, the tales of Indian women and the John Smith retrospective. The seminars, panel discussions and 'Film market' of the Festival bring a great many audiovisual professionals from Finland and abroad to Tampere, and the Festival imports good films, film-makers and other film professionals, thus also promoting the export of Finnish films through its extensive partnership network. The Film Festival is often also called upon by other festivals for expert help on Finnish films.

Animated films

Drawing on the experience gained with documentaries, among other things, AVEK has been developing the 'Animation spearhead project 2004'. It emerged from the disparity between the financing capacity available and the talent and the number of highly trained creators in the genre. The ratio of applications to financing available is clearly more disadvantageous than for any other genre of film. Of a dozen production-ready projects, only one or two can be financed through the concerted efforts of all funding providers.⁷⁸

Finnish animated films have also suffered from an undeveloped production structure. Because animated films have a huge global market, the aim of the 'spearhead project' is to boost national efficiency and competitiveness by improving the viability of the genre as a whole. Cultural exports in film can support the genre by presenting Finnish animations more extensively at important festivals and sales events.

To produce commercially significant animations, it is usually necessary to have an animation studio. Although individual internationally successful animated films have been produced in Finland, the lack of such studios means that there has been scant potential for systematic exports. Current subsidies are inadequate for producing the sort of long series that the markets demand.⁷⁸ For instance, the Moomin series that was highly successful abroad was produced in the Netherlands and manufactured in Japan, even though the producer was Finnish.⁷⁹

The strengths of animated film are the huge global market, the increasing number of channels with the spreading of digitalization, and growth potential in children's programmes in particular. Using animation in teaching and publicity has also yielded good results.⁷⁸ This success has been fuelled largely by production methods enabled by new technology, an exponential increase in distribution channels, the applicability of animation to a variety of devices, and the ease with which animations can be created in different versions and localized.⁷⁹

The greatest weakness in the genre is the current funding capacity, which is inadequate in relation to the expanding nature of the genre and the number of talented creators. There is plenty of high-quality training, but the production structure is undeveloped; the production companies are small, and there is little capital available.¹⁵²

Recommendations for action:

- The objective programme for Finnish film 2003-2005 proposes that public subsidies for film should be increased to EUR 25 million per year. According to the programme, EUR 2.5 million per year should be allocated to the presentation, distribution and cultural exports of films;
- Internationalization and cultural exports require determined cooperation between film producers and the Finnish Film Foundation from production development to marketing of the completed film. The success potential of Finnish films that attract international interest must be exploited at an early phase in the production process;

- Digital distribution channels must be used without prejudice and effectively;
- The concept of international joint production must be clearly and uniformly defined.⁸⁰

The Finnish Film Archive

Specializing in early Finnish film, the Finnish Film Archive has an extensive international network for screenings and research, and it has promoted Finnish films in numerous contexts. As an example, it is worth mentioning that the success of Aki Kaurismäki has generated international interest in the history of Finnish film and hence a demand for compiling series of Finnish film classics for international events. Copies furnished by the Film Archive are screened all around the world each year, particularly in France.

The problem for the Film Archive is a lack of funding sufficient for developing exports. The Archive is dependent on the copies donated to it, their condition and the activeness and resources of the countries that are interested in Finnish film at any one time. The Archive's collections have suffered wear and tear over the years, and some prints are in rather bad shape due to frequent screenings at festivals. The Archive has few subtitled prints covering Finland's fine tradition in short films and documentaries, and there are no resources for producing brochures in English or French, either.⁸¹

Dance

An increasing percentage of the audiences for Finnish dance can be found abroad. In 2002, there were 136 Finnish dance performances abroad, with a total of 34,150 viewers. The corresponding figures for 2003 were 199 and 91,390, accounting for 20% of the total audiences for Finnish dance. International performances are a major source of income for many dance companies and artists. For those Finnish dance companies that perform abroad the most frequently, foreign income may account for over half their turnover or budget. In addition to traditional sales of performances, the sales of performance rights, royalty revenue and foreign

financing for joint productions are increasing in importance.

Being independent of language, dance is an easy art form to export. Contemporary dance enjoys an important position in the field of art in many European countries such as France, Germany, the Netherlands and Britain. There is a much wider market for contemporary dance in central Europe than in the Nordic countries. Beyond Europe too — particularly in North America and the growth centres of Asia — there is an increasing demand for foreign contemporary dance.

There are ten dance companies in Finland that operate under the Theatres and Orchestras Act, and in addition to these the Helsinki City Theatre houses the only dance company attached to a drama theatre. The Finnish National Ballet stages works by Finnish contemporary choreographers every year. There are about fifteen free dance companies and about 40 active freelance choreographers. Among Finland's internationally most successful choreographers are Tero Saarinen, Kenneth Kvarnström, Tommi Kitti, Jorma Uotinen, Jyrki Karttunen and Arja Raatikainen.

Dance exports consist of several components: performances (individual guest appearances and foreign tours), events (festivals and themed programmes in Finland and abroad), expertise (choreographer visits) and dance as content (performance recordings, documentaries, dance films, DVDs). The greatest commercial development potential is in dance as content; in addition to TV productions, the game industry for instance could make use of the creative input of choreographers in the creation of games. The success of any of these components is, however, tied to the success of the others.

In the late 1990s, extensive events showcasing Finnish dance emerged following international models (for example the *Tanssiareena* festival in the Helsinki area). In addition to these, the *Täydenkuun tanssit* (Full moon dances) festival in Pyhäjärvi is an important showcase for Finnish contemporary dance. Some 15 to 20 producers visit Finland each year, and dance companies that appear regularly at festivals and abroad have their own contacts.

Some 20 to 30 parties each year undertake performances abroad, and in addition, Finnish dancers make guest appearances abroad as choreographers, instructors and teachers. Finnish dance works are performed in 20 to 30 countries every year, and a dozen foreign dance journalists visit Finland each year (including visits to the Finnish National Ballet). In 2003, performances of Finnish dance were seen in 29 countries, and the total number of viewers abroad accounted for about 20% of the total audiences for Finnish dance. The increased visibility of dance is due particularly to enhanced international publicity by Finnish dance companies and choreographers and by the Dance Information Centre.

Due to the international outlook in dance and the language-independent nature of the branch, the prospects for exports of Finnish dance are good; dance is considered a 'future art form' in the West, because dance is becoming increasingly popular with adolescents and young adults. The strong visual component is probably one reason for this; dance is created in close interaction with photography, media art, film, multimedia and fine arts. The growth prognoses for revenues from exports and royalties are good in all areas of dance: sales of performances and events, exports of expertise and digital product content.

The particular strengths of Finnish dance are originality, visual brilliance and creative use of technology. Many Finnish choreographers have been using technological applications in their work for years (creative use of high-tech lighting and sound, interaction with the audience, video projections, using real-time images in set design, etc.), which has helped Finnish dance gain international awareness.

There is a strong will in the field for boosting exports of dance works, which is a strength on the production side. In addition to improving export financing and the domestic infrastructure, the aim is to found an export centre that would offer production services for dancers and production groups aiming for the international market. This export centre could be founded in conjunction with existing organizations such as Tanssiareena ry.,

modelled on the Dance Umbrella festival and its production service unit in London. Once the activity has been established and the market has matured, it will be possible to detach the agency and turn it into an independent business unit.

The main problem in dance exports is a lack of professional producers and managers, which is due to a lack of resources. It is mainly the creators themselves who manage international sales and marketing. Few dance companies employ a full-time producer or manager. Recently, the need for private management services has been acknowledged in the dance sector, and certain individual events have been entrusted to the management of small private companies.

The greatest threat to dance exports is exclusion from international networks as a result of inadequate resources. The number of international joint productions has increased considerably; these are mainly implemented in various networks, and thus successful international cooperation and exports require solid networks. Because there is limited financing available for producing new works and for networking, Finns are unable to make sufficient use of the benefits of joint productions. In many cases, the foundation for exports is laid through joint productions in networks, with the financing derived from several countries. In such cases, the function of national subsidies is to enable the joint production to tour. The ability to undertake joint production efforts is in direct proportion to the national resources available in the dance sector. Finland needs a better production infrastructure, and networking and the covering of marketing and visiting costs need to be better supported.¹⁵³

Recommendations for action:

- Improve the production infrastructure;
- Develop resources for covering the costs of marketing and visits;
- Boost the resources of the Dance Information Centre;
- Lay a foundation for the work of a dance export agency.

Theatre

Finnish theatre is of high professional quality and originality. However, it suffers from low international visibility. Exports of drama are hindered by the language barrier. The majority of visits abroad that have taken place involve productions where language is of secondary importance, such as dance theatre, pantomime and puppet shows. Productions in Swedish have been exported to the other Nordic countries, and productions in Finnish to Sweden, the target audience in the latter case being Finns resident in Sweden. Translation adds to the costs of such visits. Demand has increased with Finland's membership of the EU, although export volumes are still relatively small. Some of the demand is for genres of theatre that are of marginal importance in Finland (avant-garde, street theatre, cross-discipline, experimental). The statistics for theatre company visits abroad (excluding dance companies) are as follows: in 2001, 17 companies with 71 performances in 12 countries and 10,399 viewers; in 2002, 21 companies with 137 performances in 15 countries and 14,674 viewers; and in 2003, 18 companies with 63 performances in 21 countries and 10,487 viewers.

The language barrier effectively prevents exports of Finnish plays. Although some plays have been translated into English and German, they have not been marketed well enough. The agencies supervising authors' rights are focused on the domestic market. There is no agency in Finland that markets Finnish plays abroad on a professional basis. The situation for Swedish-language drama is somewhat better, as Nordic agencies have distributed these plays.

Until recent years, decent translations did not even exist of major Finnish playwrights such as Kivi, Canth and Jotuni. Contemporary Finnish plays are also a rarity on foreign stages, but the tide is turning. There are no exact statistics of premiered productions of Finnish plays abroad, because this information is held by the copyright holders (authors or agencies). The statistics compiled by the Finnish Theatre Information Centre are indicative,

however: 6 read-throughs and 4 premiered productions in 2001; 5 read-throughs and 4 premiered productions in 2002; 15 read-throughs and 9 premiered productions in 2003, not including 17 premiered productions of a youth theatre play commissioned from Laura Ruohonen in Britain.

The task of the Finnish Theatre Information Centre is to publicize information on Finnish theatre internationally. The Centre is involved in several international organizations and networks and has organized events that have led to international joint projects and invitations. The Centre aims to ensure that material is available for that portion of Finnish drama which is internationally the most interesting. Regular play translations were begun in the 1970s, but in recent years the Centre has focused on promoting drama exports, partly with EU funding. As a result, the formerly modest export figures for Finnish plays skyrocketed in 2003. The play translation seminars organized by the Centre and the active work of the translator network have had their effect too, first visible as published translated plays and later as premiered productions.

All theatre organizations are involved in international cooperation, particularly the Finnish divisions of international organizations. As an example of successful export efforts it is worth mentioning the Union of Finnish Theatre Directors, whose cultural partnership agreements with parallel unions in Spain and Estonia have resulted in exchanges of performances, personnel and plays.

Finland has been very active in theatre exchange on the grass-roots level. Dramatic artists frequently go on study trips, do networking, participate in international organizations and distribute information on Finnish drama expertise. Networks convey invitations to festivals and events and generate joint projects and tools to enable mobility (e.g. www.on-the-move.org).

Major organizations and networks include: the International Theatre Institute (member: Theatre Information Centre), the International Association of Theatre for Children and Young People

(ASSITEJ, Finnish unit), the Union Internationale de la Marionnette (UNIMA, Finnish unit), the International Organization of Scenographers, Theatre Architects and Technicians (OISTAT, Finnish unit), the European Theatre Union (member: Finnish National Theatre), the European Theatre Convention (member: Helsinki City Theatre), the Informal European Theatre Meeting (IETM, 12 Finnish member organizations), the European Network of Information Centres for the Performing Arts (ENICPA, members: Theatre Information Centre, Dance Information Centre), Baltic Circle (founding member: Q-teatteri) and the Barents theatre network (involving theatres and companies in Lapland).

Events hosted by Finland (e.g. the ITI conference in 1989, the IETM Annual Meeting in 1999, and Baltic Circle in 2002 and 2004) have been unique opportunities for Finnish theatre to present itself. The SeOs festival at the IETM meeting, for instance, launched the international career of director Kristian Smeds, further confirmed by the Finnish Case at Baltic Circle.

Theatre festivals, conferences, seminars and workshops have helped establish lasting contacts with foreign artists. The Tampere Theatre Festival has functioned as a forum for exports of both performances and plays. Theatres that invite foreign companies to perform also promote exports (Espoo City Theatre, Savoy, Alexander Theatre).

The extensive international activities of the Theatre Academy and the Department of Acting at the University of Tampere (Näty) are also laying a foundation for future theatre exchange projects in exporting Finnish training expertise. At the Theatre Academy, several students each year can take courses abroad under various exchange programmes. Expertise exports have been undertaken by the stage technology and design consultation unit (Teakon) of the Theatre Academy and the Department of Sound and Lighting Design of the Theatre Academy, located in Tampere, which is of a uniquely high standard worldwide and provides significant potential for developing training concepts, expertise and technology for exports.¹⁵⁴

Recommendations for action:

- Set up a system of the kind that has been found successful in some other countries, providing high-quality exportable productions with export subsidy guarantees even before the production has received any invitations for performances abroad;
- Set up a cultural exports helpdesk;
- Promote 'Crossing Borders' performance art, which act as drama laboratories and development units for the branch.⁸²

Contemporary circus

According to Tomi Purovaara, contemporary circus⁸³ is the current state of circus evolution, not an antithesis to the traditional circus. Cirque Nouveau brought the revolutionary approach of the 1970s to circus. Contemporary circus was brought to Finland by companies such as the juggling group Circo Aero and Sorin Sirkus of Tampere in the mid-1990s. It has since established itself, and educational institutions providing basic instruction in the circus have been founded in Finland. However, many Finnish circus artists have studied abroad or on the job.

According to the Centre for contemporary circus (Cirko), three companies or performers had a total of seven productions abroad in 2003. The target countries were Italy, Sweden, Denmark, France and Japan. These productions had a total of 60 performances. This is a marked increase from 1999, when there was only one production abroad. The greatest leaps occurred in 2001, when the total number of performances abroad increased to 19 from 3 in the previous year, and in 2003, when the number of performances almost tripled from the previous year.

Contemporary circus is also establishing itself as an independent art form in its own right in Finland. Jani Nuutinen and Maksim Komaro of the Circo Aero company and other young artists have developed an original Finnish style that has not gone unnoticed abroad. New productions and companies are emerging all the time, and circus has been accepted as a subject in the basic studies of

municipal children's art schools. Contemporary circus is also easy to export because it is accessible and not dependent on language.

The problem is the new status of contemporary circus in the domain of Finnish art, apparent in the quality and volume of public subsidies. Finnish contemporary circus is obliged to make compromises in order to reach its audiences, because the production structures are underdeveloped. Artist resources are approaching or have already reached international standards, but the distribution of financial resources is haphazard. There is no permanent structure governing all existing resources. In recent years, the public sector has invested in the development of training for circus instructors. There is no vocational education for circus artists or further education for professionals already working in the branch.

The purpose of the development project launched by Cirko is to create financial, operative and artistic structures that would ensure the development of contemporary circus in Finland. This would lay the foundation for self-improvement in the branch and safeguard working conditions for young professionals. Cirko aims to secure funding for this project through public funding channels and then to create a strong and coherent structure for producing performances and events to unify the currently incoherent branch. At the same time, its aim is to improve the operating potential of Finnish contemporary circus. The public sector has made considerable investments in developing circus education in Finland in recent years.

It is important for the development of contemporary circus in the future to secure sufficient resources. There is a threat of Finnish trained professionals moving abroad to make use of more developed production processes.¹⁵⁵

Recommendations for action:

- Support the development of structures and ensure availability of funding;
- Increase opportunities for further studies in the branch.

Architecture

The Finnish Association of Architects (SAFA) is involved in the international arena for example through its active membership of the Union International des Architectes (UIA) in the Nordic Section formed by architects' associations from the Nordic countries.

SAFA is also a member of the Architects' Council of Europe (ACE), an umbrella organization for EU Member States and applicant states.

Nordic contacts are also upheld through annual meetings of board members (*styrelsemöte*) and competition secretaries (*tävlingmöte*). SAFA also participates in North Calotte cooperation managed by the northernmost local departments of the architects' associations of the Nordic countries.

A shared website, Archi Euro 3rd Millennium — a Comparison of Architecture and Professional Practices in Europe, is being developed in the EU for presenting best practices in various countries and for increasing the mobility of architects within the EU. The project is based on an earlier pilot project undertaken by France, Italy and Poland. The intention is to involve all Member States. The website will include information on countries, architects, legislation, architectural practices, major actors, etc.

The Museum of Finnish Architecture is a national specialist museum whose task is to record architecture and to increase our knowledge and understanding of the past, present and future of architecture. It is an information centre that supports and promotes research into and critique of contemporary architecture. The Museum focuses on architecture since 1900. Its export products include exhibitions, talks and lectures, seminars, and brochures and publications. The Museum produces an average of two exhibitions for international touring each year. Exhibitions have been exported to the Nordic countries, Europe, the USA and Japan. The annual budget for international touring exhibitions has been between EUR 60,000 and 150,000 during the period examined. Most of the funding has come from the Ministry of Education and, for certain individual

exhibitions, the Ministry for Foreign Affairs. The subsidies have been shrinking in the recent past.

Eero Saarinen — Shaping the Postwar Culture is an extensive research and exhibition project charting the life work of Eero Saarinen. It was launched at the beginning of 2003 jointly by the Museum and Yale University. The Visual Arts Foundation of the USA is also involved. The exhibition will be first displayed at the Art Hall in Helsinki in 2006 on the occasion of the 50th anniversary of the Museum of Finnish Architecture. After this, the exhibition will go on tour abroad.

The ARMI Information Centre for Architecture, Building and Design will play an important role in international relations in the future. Members of ARMI include the Museum of Finnish Architecture, the Centre for construction technology, the Building Information Institute, the Association of Finnish Architects (SAFA), the Association of Finnish Civil Engineers (RIL), the Finnish Association of Designers Ornamo and the graphic design professional association Grafia. Also involved are Design Forum Finland and the Helsinki City Planning Department.

ARMI will be an open database serving the public at large as well as professionals in the branch. Its functions will include information service, exhibitions, guidance, training and research. International networking and cooperation will also be important. The architectural competition for the ARMI building was resolved in January 2002, and plans for the ARMI building to be built in Katajanokka in Helsinki now exist. ARMI will represent broad-based cooperation for the good of the built environment.

GAUDI (Governance, Architecture and Urbanism: a Democratic Interaction) is an extensive EU-subsidized three-year project (2002-2004) intended to increase people's awareness of their environment and promote the involvement of citizens in the shaping of that environment.

The International Confederation of Architectural Museums (ICAM) today has several regional organizations. One of them is ICAMNord, a liaison between museums in the Nordic and Baltic countries.

The architectural museums of the Baltic Sea region have assembled an exhibition presenting the Art Nouveau (Jugendstil) architecture of coastal cities of the Baltic. A joint effort by architectural museums in Latvia, Sweden, Finland and Russia, the exhibition is touring cities in the region from 2003 to 2005.

Pyhä tila (Sacred space), a Finnish-Japanese joint-produced exhibition of modern Finnish church architecture, is beginning a tour of the USA in 2004. The *Uusinta suomalaista arkkitehtuuria vu. 2002-2003* (Newest Finnish architecture 2002-2003) exhibition is also starting an international tour. The Museum of Finnish Architecture is participating in a shared exhibition with Norway and Sweden at the architecture biennale in Venice and is also mounting an exhibition of its own, *From Wood to Architecture*, about the use of wood in modern Finnish architecture.

The Alvar Aalto Museum of the Alvar Aalto Foundation focused its cultural exports on architects, architectural students and designers between 1992 and 2002, with the Nordic countries, Europe, the USA, Asia, South America, Japan, Australia and New Zealand as the target areas. The export products have consisted of exhibitions, talks and lectures, seminars, and brochures and publications. Each year, the Museum has exported one to three exhibitions and a number of talks and lectures, a book in seven of the years examined, and brochures in some of the years. The annual budget has been EUR 50,000 to 120,000; the parties providing the funding have included the Ministry of Education every year and also the Ministry of Trade and Industry in 1994 and 1999 and the Ministry for Foreign Affairs in 1999. The total amount of subsidies has been declining since 2000.

Projects of the Alvar Aalto Academy for 2002 included the international architecture research event *Universal vs. Individual 2002*, with participants from 25 countries, the modern architecture restoration course *MARC 2002*, organized in cooperation with ICCROM (Rome), Helsinki University of Technology and the Architecture School at the Royal University College

of Fine Arts (Stockholm), and the European Forum for Architectural Policies — Architectural Quality. The European Forum for Architectural Policies is an informal network for architecture, urban planning and design. Furthermore, a web portal for Finnish architecture was designed, www.finnisharchitecture.fi.

According to a survey on what Finnish companies think about sponsorship, conducted in connection with the architecture export forum in 2002, Finnish companies want sponsor partnerships to be high-quality, long-term and customized to support their business. The geographical orientation of their business affects their interest. Shared natural target areas include the Nordic countries, the Baltic countries, Russia and central Europe. Multinational companies consider it problematic to contribute to the promotion of national culture, since these companies operate in many countries and cannot afford to be perceived as unequivocally Finnish. On the other hand, there is no problem in contributing to international projects.

The Alvar Aalto Academy envisages the founding of a forum for major actors in architecture, with funding sought beyond current channels. Such a forum has met informally since 2002, and it is steered mainly by the Museum of Finnish Architecture. Another idea in the pipeline is to include representatives of major architectural countries in the Academy's 'honorary member' system and also to link all the societies and institutions operating under Aalto's name abroad. Honorary members would become 'living info spots' for Finnish architecture and could be invited to Finland to lecture.

The International Course on Modern Architecture Conservation (MARC) was launched in 1999. The first course was held in Helsinki, the second in Jyväskylä. The Finnish organizers were the National Board of Antiquities, Helsinki University of Technology (1999) and the Alvar Aalto Academy (2002). The international partners were ICCROM, the Royal University College of Fine Arts (Stockholm) and the University of Westminster in London. In 2002, funding was received from ICCROM, the City of Jyväskylä, the

Ministry of Education and the EU.

The wood architecture discipline at the Department of Architecture at Helsinki University of Technology has attracted much international interest and attained the cutting edge in university-level teaching of wood construction. Finland is the only country to host a university chair in wood architecture. Few countries even have a tradition of wood building. In the past term, there were students in the programme not only from Europe but from the USA, South America, Japan and Australia. Over the past five years, as many as half of all students have been foreign.¹⁵⁶

Recommendations for action:

- Create a Finnish cultural rescue team to record and salvage valuable cultural heritage in areas threatened by disaster;
- The disappearance of folk architecture is a worldwide threat, as for instance with the large log houses in Finland, Russia and Japan that can no longer be maintained;
- Develop wood architecture expertise and training as a Finnish export product.

Design

Design and industrial design

According to a survey by the New Zealand Institute of Economic Research (NZIER), the 25 leading national economies in the world — with Finland at the head — are also leading users of design. Thus, design factors and competitiveness seem to enjoy a positive correlation. The aim of the Government's design policy programme, *Muotoilu 2005!*, is to create a design system for Finland to enable Finland to attain a leading position in the use of design. The Tekes *Muoto 2005* programme, for instance, promotes the internationalization of design services and practices. According to the monitoring group of the *Muotoilu 2005* programme, the design system has evolved widely. Important actors outside the design community itself have been involved,

which has energized development and increased confidence towards design. Significant advances have also been achieved in design scholarship.⁸⁵ The *Muotoilun vuosi 2005* (Year of design 2005) programme to be coordinated by Design Forum Finland is to be aimed at both domestic and foreign parties.

Measured by turnover, the Finnish design industry accounts for 2% of all Finnish industrial exports. Design has a small market share in central Europe, due partly to the small volume of Finnish exports and partly to the large size of the market. Nevertheless, design has become a major factor in the national innovation system and competitiveness.⁸⁶

According to a study conducted by the University of Art and Design Helsinki in 2001, 60% of the client companies of the design branch were active on the international market. The highest percentage, 85%, was recorded in the group of industrial designers. Two thirds of interior decoration businesses and over half of all graphic designers pursued international activities. A total of 25% of the respondent companies had collaborated with foreign designers or design agencies; in most cases, the partners were from Britain or Germany.⁸⁷ Among the companies participating in an internationalization survey conducted in the interior decorating business in 1999, the median was for a company to gain 20% to 50% of its sales from exports, the main export region being the Nordic countries.⁸⁸

Designium

Industrial design teaching at the University of Art and Design Helsinki, the Lahti Institute of Design and the University of Lapland is of crucial importance for cultural exports of design. These universities have networked with top international actors in the branch, and their students are immersed in internationalization right from the start.

Designium, the Centre of Innovation in Design, is built on close cooperation between the University of Art and Design Helsinki, the University of Lapland, Helsinki University of Technology, the

Helsinki School of Economics and Business Administration and other universities, polytechnics, companies and public bodies. The task of Designium is to promote the development of the national design policy and the internationalization of Finnish design in order to make design into a significant industrial competitiveness factor.

Designium is founded on the promoting of new expertise in design and of market-driven multi-sector R&D work in the branch, and on the commercialization of its results. Research is supported by developing innovative forms of cooperation such as experimental and laboratory work catering to R&D in companies together with various units at the University of Art and Design Helsinki, other universities, research institutions and the business world.

Designium offers the following services:

1. Innovation services: The aim of innovation services is to support the identification, assessment and commercial exploitation of innovations created at the University of Art and Design Helsinki.
2. Copyright service unit for arts universities: The aim of the copyright service unit is to provide innovation services related to copyright, related immaterial rights and design protection. Most of the service is provided through the copyright HelpDesk.
3. Career and recruitment services: The purpose of career and recruitment services is to help graduates of the University of Art and Design Helsinki to find employment and to improve their labour market knowledge and abilities. The aim is to help students orientate themselves to working life from the start of their studies and to facilitate a smooth transition from university to working life.
4. Information services: Designium produces information on the international development of industrial design, with reference to industry, design policy issues, design business and research. Designium publishes an international Internet newsletter to cover and document strategic design, innovation environments and innovation systems development.¹⁵⁷

One of the success stories of the Finnish design industry is Tulikivi, the world leader in manufacturing and marketing heat-retaining fireplaces. The market in Europe and North America is estimated to total EUR 2.5 billion. Indirect-heating fireplaces account for 10% of this, and Tulikivi in turn holds a 10% market share of this. Honkarakenne is the world leader in manufacturing and marketing industrially produced log houses. Honka accounts for about 5% of the total worldwide sales of log houses.⁸⁶

The task of Design Forum Finland, maintained by the Finnish Society of Crafts and Design, is to present Finnish design and promote use and awareness of it through exhibitions, prizes and publications. An important international publication is *Form Function Finland*, a periodical in English with subscribers in about 70 countries.⁸⁹ Touring exhibitions of contemporary design are exported; for instance, in 2002 the Young Nordic Design: The Generation X exhibition toured North America and Finnish Design 125 toured Australia, New Zealand and the Far East. The target countries have usually been chosen according to the wishes of various ministries, to harmonize for instance with cultural exchange programmes or government-defined focus on cultural exports or economic measures.⁹⁰ Demand for design exhibitions has been growing in recent years, and this trend seems to be continuing.⁹¹

Design Forum Finland has experience in cultural exports involving exhibitions throughout its existence, for almost 130 years (the Finnish Society of Crafts and Design, which maintains Design Forum Finland, was founded in 1875). Exhibitions have toured the Nordic countries, Europe, Asia, Australia, New Zealand and South America.

The international work of Design Forum Finland involves cooperation with embassies and cultural institutes as well as established worldwide relationships with major design centres. The International Council of Industrial Designers (ICSID) and the Scandinavian Design Council (SDC) are international umbrella organizations whose networks are important for these efforts.

Grafia ry. is the national organization of graphic

designers (founded in 1933). There is graphic design expertise in Finland that could be exported more efficiently than at present. Graphic design includes any shaping of information: textbooks, magazines, books, children's books, corporate image design, marketing communications, telecommunications, TV graphics and increasingly Web graphics too.¹⁵⁸

The strengths of Finnish design are in its functional and aesthetic quality, which is considered to fulfil demanding international criteria. A command of simple shapes is often cited as a Finnish strong point.⁹² Services in the branch are increasing and being integrated into broad-based packages. Professionals in this branch also have good language skills; 29% state that they can practice their profession in two languages,⁸⁷ 33% in three languages and one quarter in four or more languages. The Odysseus project, helping young designers to go abroad to work, contributes to internationalization and expertise and promotes Finnish design abroad.

The *Osaamisen ehdot* (Terms of expertise) report noted that a lack of business competence and networking combined with bad project management were the most common reasons for the failure of international efforts. A low level of internationalization and the small size of companies were cited among the five main obstacles to the development of design agencies in industrial design, interior decorating and graphic design. Productization of services, self-management of entrepreneurship and improvement of profitability require further work, as do internationalization, networking and use of the Internet.⁸⁷ Fresh graduates in particular have difficulties in getting visibility for their work and in establishing international relationships.⁵⁹ Finnish companies have also had problems with internal efficiency, market-guided approaches and investments in researching their own domain.⁸⁸ The distribution of training capacity is a broader problem: there is too little training and research at the university level, while lower levels produce more graduates than there are jobs available.⁹³

The problem with design exhibitions abroad is

often that the exhibition architecture and transportation consume the majority of the budget, leaving insufficient resources for marketing. However, efforts should be taken to use international design exhibitions more efficiently both for cultural promotion and exports. This should also be taken into account when selecting target countries. Participating in trade fairs in the branch should also be increased, for instance through networking of actors in the branch and joint projects.

Short-term and ad hoc planning and unexpected exhibition invitations make it difficult to manage funding and the practical organization of exhibitions. The aim should be to achieve anticipation and synchronization of the plans of the various actors in the branch. Rapid communications are useful in this respect. Genuine networking should be aimed at. Projects can be implemented independently, but duplication of efforts by actors in the branch should be avoided.

What is a threat is the current trend of the large international agencies, with increasing emphasis on design concepts, information collection preceding design and shaping that information through research. These agencies also focus on the application of cultural and social information in the creation of a service menu in the branch. In a 'mature market', cultural focusing may be crucial to finding customers. However, Finnish companies are too small to undertake something like this; and yet the challenge must be taken up to survive in international competition.⁸⁷ Finland should also invest in international visibility; many of our competitors have efficient, high-profile, market-driven publicity.

An example of the effect of networking is the Imu organization in the field of spatial design and furniture design. Its purpose is to help fresh graduates establish themselves professionally. A professional jury selects products and creators, which can then be provided rapidly with publicity thanks to the streamlined organization. Graphic appearance is also invested in. Imu has attracted attention in the international press, and its products have been requested for sale in New York

and Paris. Such an informal, streamlined system seems well suited to supporting emerging young artists.

The monitoring group of the *Muotoilu 2005* programme proposes in its conclusions that more networking needs to be introduced into the field of Finnish design in order to boost internationalization. Publicity requires more efforts. In particular, attention must be paid to the internationalization of design agencies, a structural change to be enacted through networking and increasing company size, the enhancement of business expertise, the enhancement of design publicity, and the monitoring of development.⁹⁴

Recommendations for action:

- Review the distribution and content of training places in the design branch and increase the volume of research;
- Help structural change among companies in the design branch.

Handicrafts, industrial design and clothing and jewellery design

According to a study conducted in 1998, 27% of Finnish handicrafts and industrial design companies exported their products. However, only three of the 300 companies surveyed estimated that the international market is their primary market. Those companies that were internationally active exported 16% of their overall production on average.⁹⁵ To take an example, in 1990 exports of goldsmiths' products constituted 0.2% of Finland's total exports.⁹⁶ The survey conducted by Marketta Luutonen on the international contacts of the Finnish Crafts Organization (Taito ry.) also shows that international activities are not very common but that the branch has much potential in content and interest in internationalization. About half of the handicrafts and industrial arts associations that responded were involved in international networks or other international connections such as product exports, neighbouring area cooperation projects, city

twinning, tourism projects, services for tourists visiting the offices and shops of the association, submitting material to international publications and hosting foreign trainees.⁹⁷ The low level of international activities is due to a lack of resources and of experience. On the other hand, the crafts branch is not all that international in Europe as a whole; only 4% of the crafts organizations in the EU pursue international activities, the figure for small businesses in general being twice as high.⁹⁸

The Craft Museum of Finland has in recent years hosted several foreign exhibitions and ancillary functions such as lectures and workshops in the Nordic and Baltic countries, in Europe and in Russia. The Museum's information service caters to foreign customers too, and the Museum's website has content in English. Finland was involved in a project assembling regional textile routes for nine European countries.

There are about 13,000 businesses in the crafts branch in Finland, employing some 30,000 people. Crafts entrepreneurship can be integrated into a service concept with cultural and tourism services.⁹⁹ For instance, Taito ry. has a tourism project acquainting visitors with Finnish traditional crafts through work demonstrations, excursions, courses and active holidays. Finnish crafts are presented online in the Taito Craftnet network.¹⁰⁰ Taito ry. also acts as an expert consultant in development projects administered by other countries. At the moment, for instance, the organization is involved in a joint project with its opposite number in Slovakia, subsidized by the Ministry of Education. The organization also participates actively in Nordic cooperation and has contacts with Estonia. It is involved in its European umbrella organization through international projects. Increasing internationalization would require the hiring of an extra person, but so far no resources for this have been forthcoming.

International approaches are also pursued in various workshops such as Northern Fibre, a Nordic workshop launched by the textile designers' association TEXO ry., now an annual event. Another example is the Designers Collection group in textile art, whose purpose is to help freelance

clothing designers prosper through demonstrations at Finnish clothes fairs, by organizing fashion shows and sales pitches, and by participating in trade fairs abroad.

The Fiskars cooperative of craftsmen, designers and artists is a showcase for high-quality Finnish handicrafts and industrial design. The Fiskars exhibitions are among the largest events in the branch in Finland, with some 25,000 visitors annually. In addition to cooperative members, top names from Finland and abroad are invited to exhibit. Products by cooperative members have been exhibited elsewhere in Finland too, and abroad in London, New York and Nice, for instance.

The INCA training and development project started at the Mikkeli Vocational Institute in 1998 is an example of international cooperation between craftsmen in Denmark, Italy and Finland.

The strength of handicrafts is in its potential for strengthening local identity. Handicrafts offers people products that are personal and have a strong identity.¹⁰¹ Crafts entrepreneurs themselves consider originality, uniqueness and quality of their products their main success factors. There is plenty of crafts expertise and training available in Finland; for example, basic handicrafts is included in basic art training.¹⁰² However, the market is not large enough to accommodate all Finnish craftsmen — exports are an opportunity.

Internationalization is hindered by a lack of business expertise¹⁰³ and a high threshold of entrepreneurship.¹⁰² Small businesses are further hindered by low production numbers and prohibitive marketing and sales costs;¹⁰⁴ a sizable percentage of the output of crafts businesses consists of unique items.¹⁰¹ The business is often amateurish and not very market-oriented.⁹⁸ According to a study on how highly crafts professions are valued conducted by the Master Guild Council, crafts professions suffer from a poor public image, training problems and a lack of product innovations and star products.¹⁰¹ Finding high-quality partners is also often a problem.¹⁰⁵ Moreover, Finland is far removed from the cutting edge of European crafts; the focus in the branch in

Europe lies solidly in the Mediterranean. In the common market, problems are caused by stiff competition and also by the introduction of production standards whereby crafts businesses have to conform to the same standards as large companies.⁹⁸ Disparity of statistics between EU Member States is also a disadvantage in the development of the crafts branch, as crafts businesses are defined in very different ways.⁹⁹

On the other hand, the crafts branch has opportunities in its strong expertise, flexible production structures and positive attitude to new technology. The amateur approach and cultural orientation of the branch may actually turn out to be strengths if the concept of entrepreneurship is broadened.⁹⁸ Crafts entrepreneurship might offer a way of repairing infrastructures in areas threatened by exclusion, for instance by combining tourism services and crafts into service packages.¹⁰² There is also plenty of potential in online crafts sales, for instance in the business gifts market. Although there are fears that online sales will spark plagiarism, Finnish crafts businesses are above the European average assessed by the number of Internet connections and websites they have. However, as sellers and buyers, Finns achieve no more than the European average.¹⁰⁴

Recommendations for action:

- Include crafts in international design activities and in exhibitions in general;
- Network with European organizations;
- Include crafts in tourism marketing materials;
- Create an internationalization strategy for crafts businesses, because the neighbouring area market is growing stronger, and foreigners will participate increasingly in sales events in Finland;
- Strengthen entrepreneurship by improving visibility, highlighting cultural and social factors, improving availability of products, productizing crafts expertise into services, including these services in the service and product range of other sectors, creating research and support services to generate innovations and to use technology, setting up business incubators and mentoring

systems, providing networking support services, promoting cooperation between educational institutions and companies, respecting the special features of crafts entrepreneurship and increasing the number of crafts training places in the basic arts education system. /xlvii/

Radio and TV

YLE

YLE Export is the export arm of the Finnish Broadcasting Company (YLE), but it also distributes joint production programmes and programmes produced by independent production companies. The purpose of YLE sales abroad is to increase the international visibility of YLE and to promote Finnish cultural exports.

Some 50 new programmes are offered to buyers each year, about half of them produced by YLE and the other half produced by independent production companies or as joint productions. The entire range consists of about 800 titles, of which 200 are in the active sales collection. Between 120 and 200 sales are concluded annually. In recent years, programmes have been sold to about 50 countries, mostly to TV companies in the Nordic countries and Europe. Excluding joint productions, YLE revenue from these sales was about FIM 3 million per year in the late 1990s.

YLE Export participates annually in two of the largest trade fairs in the branch, MIP-TV and MIPCOM in Cannes, France, and their respective pre-events, Mipdoc and Mipcom Junior. At the moment, there are not enough resources or programmes to participate in more trade fairs. YLE also participates in 50 to 60 international TV festivals annually and has received several distinguished awards.

There are also other international distribution channels available to YLE. The *Pohjoisvisio* programme is for exchanging non-fiction and documentary programmes between the Nordic countries. YLE provides between 120 and 160 self-

produced titles per year, of which between 100 and 140 are broadcast. The number of programmes offered for exchange by YLE and thereby broadcast in the other Nordic countries has been steadily increasing in recent years. Joint productions are also regularly undertaken within this programme, which provides TV channels with additional resources for their own productions. A dozen joint productions involving YLE end up being broadcast in the other Nordic countries each year. Also, two children's programmes produced by YLE are broadcast in several European countries through the European Broadcasting Union (EBU) children's programme exchange.¹⁰⁶

YLE has also participated in EBU programme group cooperation, where each country produces a programme that together form a series. Such series are produced particularly for children and adolescents and in the genre of educational and science programmes, but also in cultural programming. Because of the stiff competition situation, these series are often not prime-time programming with European broadcasting companies. About 5 to 10 programmes made in Finland or about Finland are distributed in Europe each year, broadcast in 10 to 15 countries. The EBU competitions for young soloists and dancers, which are organized as joint productions in various countries and in which Finland regularly participates, can also be considered cultural exports.

YLE and the ARTE cultural channel have an agreement whereby YLE TV1 produces about four documentaries and one music/dance programme for ARTE each year. The YLE Teema digital channel is also involved in closer cooperation between cultural theme channels in Europe.¹⁰⁸

YLE is known abroad for its strong quality documentaries, children's programmes and drama.

The Finnish natural environment is a rich source of material for documentaries; well-made depictions of northern wildernesses are in high demand worldwide. There are many talented nature photographers in Finland. Nature programmes, however, require an interesting narrative in addition to beautiful images, and this takes time and money to achieve. There is a strong demand for children's

programmes, and earlier YLE had a number of high-quality animated series in its collection. However, such programmes should be available as long series to facilitate their programming and the sale of merchandise. Because of funding cuts, the number of programmes offered for sale has declined. There is a fear of expertise atrophy in Finland because of a lack of funds.

It is not easy to sell programmes. Stiff competition, exacting technical specifications, complicated pricing and intricate copyright issues place strict criteria on any programme to be selected for sale. International sales of programmes requires extensive special expertise and a thorough knowledge of copyright law, contractual procedure in the branch, and the market and its practices. As programme rights are sold by region and often for exclusive use for a specified time, special care must be taken to avoid sales of overlapping rights. Therefore, only one seller can handle any one region at a time.

There are many problems involved in selling programmes. Finland is a remote country even by European standards, and Finnish culture is not very well known. Cultural differences have a major impact on the outlook and choices of buyers. A smash hit in Finland will not necessarily win over audiences abroad. Exported programmes must be universal in outlook, and the language problem must also be taken into account.

Often there are also quite mundane technical and copyright issues hindering sales. Documentaries make much use of archive material, licensing for which may be extremely difficult to achieve in retrospect for export purposes. Copyright on the music used in a particular programme may also prevent sales of that programme. If a programme is of unsuitable length, it may never get off the ground even if its content is good. Furthermore, a separate soundtrack has to be provided in exported programmes for dubbing in the language of the target country, and there must also be available a dialogue or script corresponding to the finished programme so that the buyer can have a translation made from the original transcript.

Despite all these difficulties, there have been

successes: 19 Finnish programmes have been broadcast in ten or more countries. The most popular of these is *Joulupukki ja noitarumpu* (Santa and the Magic Drum), which has been broadcast in some 40 countries. A good children's or nature programme can easily transcend cultural boundaries. There is much demand worldwide for children's animation series and nature documentaries. Cultural documentaries are also in high demand.¹⁰⁶ Also, Finnish TV production expertise is esteemed internationally particularly in sports, and YLE has in fact been commissioned to organize the televising of several major sports events, most recently the opening and closing ceremonies and track and field events at the Olympic Games in Athens.¹⁰⁸

New Finnish contemporary operas have also attracted international interest. Some of these productions have been given to foreign distributors, who have better potential for securing the rights to the music and the star singers involved at reasonable cost. The copyright costs for contemporary opera have proven to be too prohibitive to make international sales profitable even if a production turns out successful. Efforts should be taken to create a system where all copyright holders would be covered by royalty agreements.

Independent TV production companies are also striving to enter the export market for instance with formats, which YLE does not sell but which account for the greatest sums of money in the branch at the moment.¹⁰⁹ The success of the format concept is that a format can be produced into a programme locally in each target country.¹¹⁰ The problem here is that the success of TV producers depends on the financial position of domestic TV broadcasters, and entering the international market requires a strong financial foundation. Small companies do not have the resources for product development, and since domestic TV channels only commission products according to their own current needs, production companies do not have the time or the means to develop internationally interesting products. Most productions aimed at the domestic market are, after all, not interesting for foreign customers. There has been talk of setting up

a sufficiently large market-oriented product development fund in the branch.¹¹¹ The threat is that if production of TV programmes remains with a handful of actors, the programmes produced will resemble each other and grow stale. A narrow range of programming is bad not only for viewers but for Finnish culture as a whole.¹¹²

Export opportunities exist in programme formats such as the fake talk show *W-tyyli*, an option on which has already been sold to Germany, Belgium and Portugal,¹¹³ and the slowly opening TV market of China. If the Internet becomes the primary programming channel in China instead of traditional TV, the market for interactive programming will mushroom and thus offer potential for European media businesses too.¹¹⁰

Cultural exports in radio¹¹⁴

In radio, cultural exports consist of music exchange and exports of drama and documentaries/features. Music programmes are offered through the EBU, mainly programmes from Finnish summer festivals and programmes designed to fit into the themed concert series of the EBU. In 2003, YLE offered 47 concerts for EBU exchange. Some of these concerts have been broadcast in several countries. Drama and documentary exports are largely managed through programme festivals and 'feature conferences', where extracts are played. Over the past two years, YLE has sold a total of 23 programmes.

YLE music production also contains international elements. In jazz, for instance, foreign performers participate increasingly in Finnish studio productions thanks to the increasing international contacts of Finnish musicians. Performances by expatriate Finnish jazz musicians have also been recorded. In rock music, YLE has cooperated with other Nordic countries and the EBU at the Roskilde Festival. Also, EBU Eurosonic relays concerts via satellite for live broadcast in Europe. At least six Finnish bands have had their gigs broadcast in this way. A Eurosonic festival is held in the Netherlands each year, and Finnish artists have appeared there with support from YLE.¹¹⁵

YLE abandoned international service media broadcasts except for Russian programming in 2002. Today, there are only small international service media units in Finland. The most important of these is the online service of the Ministry for Foreign Affairs, which has very limited resources. The international service reaches audiences interested in Finland in the language area of the broadcast language and also influences reporting in media in other countries. The international service is thus very well suited to support or report on cultural projects. Its geographical extent is its strength; it can reach even sparsely distributed audiences. Reviving this kind of activity should be considered. Any new international service media to be set up should be able to make use of sponsorship and other additional funding.¹¹⁶

Recommendations for action:

- Allocate more subsidies to programming with potential for success on the international market. This will create greater potential for increasing awareness of Finnish expertise among international actors and thus obtain foreign funding for Finnish productions;
- Create a system where all copyright holders are covered by royalty agreements;
- Consider financing models for product development in production companies to ensure independent development work beyond immediate domestic commissions.

Independent production

Hollywood studios dominate the TV market despite the programming efforts of the EU. Only the BBC has the clout to put up a challenge to American programming. In India, Bollywood is gaining ground.

Finnish commercial TV channels do not export programmes; independent production companies are expected to do so. There is no uniform TV programme sales organization in Finland. The most important international trade fair is the TV fair in

Cannes. However, a reference from a TV company can help a producer's exports.

There is no international demand for Finnish drama or comedy. Finland does not have the resources to produce the kind of quality required on the international market. The language, of course, also poses a barrier.

Another problem with commercial TV is that expectations of the growth of TV advertising have not been realized. Advertising too is international and involves heavy competition.

The greatest export potential at the moment is in entertainment formats. Exporting formats requires precise information on audience numbers, production methods and so on in the various target countries. In terms of ideas, Finnish TV formats are certainly on a par with foreign ones, but marketing and sales have proved difficult. Finnish companies Broadcasters and Susamuru have succeeded in exporting their formats. Indeed, Broadcasters is the internationally most successful Finnish company in the branch, having sold options or agreements on programme formats to 30 countries.¹⁶⁷

Cultural festivals

Various festivals, competitions and other cultural events bring foreign visitors — performers and media representatives — to Finland. Such events are organized in nearly all branches of culture. Certain events also engage in direct exports, such as Seinäjoen tangomarkkinat Oy, which acts as an agency for foreign tours of tango singers and tango orchestras.¹¹⁷ There are many cultural events in Finland that attract international interest. As an example, The Snow Show in Rovaniemi and Kemi in winter 2004 was mentioned in the media in several countries. In 2003, the Financial Times nominated the Kuhmo Chamber Music Festival as one of the top four music festivals in the world. The Festival has prompted the creation in Kuhmo of one of Finland's first cultural centres of excellence, Virtuosi.¹¹⁸ The Kemijärvi sculpture week draws on the tranquillity, natural environment and security of the far North, and it has attracted a total of 220

participants from 50 different countries over 18 years.¹¹⁹

Finland Festivals, the marketing outlet for Finnish events abroad, notes that festival marketing supports cultural policy, cultural tourism and municipal tourism agendas. Some 15 festivals participate actively in the foreign marketing efforts of Finland Festivals. This marketing takes the form of annual brochures, a website and marketing briefings and press conferences abroad. Previously, Finland Festivals used to take out advertisements in foreign publications, but this had to be abandoned because of a lack of resources. From 1999, foreign marketing has been focused on Scandinavia, the German-speaking countries of Europe, Britain, Estonia and the St Petersburg region.¹²⁰

Events, competitions and trade fairs organized abroad are also important for cultural exports.¹⁵⁹

Cultural tourism

According to a visitor survey at the *Lumoava Suomi* (Enchanting Finland) website, the site had an average of 123 hits a day in 2003. The greatest numbers of visitors from outside Finland were from Europe and North America. Of the foreign visitors, 32% were planning a trip to Finland. These were most commonly from the USA (20%), Australia (10%) and Italy (10%).¹²¹

Cultural and nature tourism is, in fact, an area with development potential for Finnish cultural exports. According to Mervi Kontturi and Satu Lautamäki, cultural tourism involves developing cultural experiences, products and services and offering them to tourists. The experiences provided must draw on the unique features of our cultural identity: heritage, customs, lifestyle and values that convey an impression of the regional culture to the tourist. Cultural tourism is a significant opportunity for retaining employment in various regions, in promoting economic development and in preserving and revitalizing cultural heritage sites.¹²³

The number of cultural tourism sites in Finland is growing while the competition for visitors is tightening. There are thousands of cultural events

all around Finland every year. According to the Finnish Tourist Board, in 2002 there were five tourist attractions in Finland that had more than 500,000 visitors. Four of these were cultural sites. The highest percentage of foreigners (47%) is found among visitors to churches; the percentage is lowest at cultural events and housing fairs.¹²⁴

According to statistics compiled by the Finnish Tourist Board for 2003, Finland's share of all tourist overnight stops in the Nordic countries was 14.0%. In terms of the number of visitors, the most came from Sweden, Germany and Britain. However, in terms of Finland's relative share in relation to the other Nordic countries, the list is topped by people from Japan (29.1%), Switzerland (28.4%), France (23.5%), Italy (22.6%) and Spain (22.3%).

In 2000, direct revenue from tourism in Finland measured by business turnover was EUR 6.9 billion. Between 1995 and 2000, tourism revenue grew by 33% adjusted for inflation, and employment in the tourism industry grew by 23%. Regionally, the benefits of this growth tended to concentrate in the core regions of the country and the large cities. Population is the greatest individual factor in the growth of tourism. However, tourism plays a far greater role in relative terms in remote regions and rural areas. In terms of the regional economy, tourism is most important in Åland, Lapland, Kainuu and Etelä-Savo.¹²⁵

According to the National Board of Antiquities development strategy 2001-2003 focusing on EU matters, the strengths of cultural tourism are prehistory tourism as a brand, the local and regional diversity and richness of the built cultural environment, the combining of cultural and nature values for example in tourist routes, natural connections with other tourism trends, and a comprehensive network of museums.

There are weaknesses too. There is no commercial vision in the productization of antiquities and prehistoric sites. The most interesting sites lie scattered across the country and are not very accessible. Plenty of sites are available in summer but very few in winter. Locations marketed as tourist spots often do not have local museums that are sufficiently well managed.

Sponsors of tourism projects are only vaguely acquainted with what is required for preserving and protecting cultural heritage, with the result that there is a danger of sites being subjected to wear and tear. Poor knowledge of cultural heritage can also lead to false image-building, in which case the ancillary functions called for in tourism projects may clash with the ethical viewpoint of the preservation of cultural heritage.

However, there is potential in cultural tourism. In international comparison, cultural tourism is a strong growth sector which can be promoted in a sustainable manner to strengthen the preservation of cultural heritage. An increasing interest in culture and history is reinforcing the need to develop high-quality cultural tourism products. There is unexploited potential in winter tourism too, for example in products that combine cultural and nature values, such as national parks. Also, local museums all over the country have the potential to be developed into sites that are interesting to tourists.¹²⁶

Recommendations for action:

- Develop cultural tourism according to the principles of sustainable development, under the cultural tourism strategy proposed by the National Board of Antiquities in 2002; improve the accessibility of tourist sites and lobby for more support to projects. Also emphasize the importance of cultural tourism education particularly for children and adolescents and the importance of online communications in distributing information.¹²⁴

Food culture

Suomen Ruokatieto ry. (Finfood) is a non-profit-making organization which distributes information on food and the food industry and promotes Finnish food culture in the European Union. The government grant sustaining Finfood comes from the agriculture and horticulture product marketing and production development budget line of the Ministry of Agriculture and Forestry.

Finnish food has the potential for exploring access to the international market in natural products, clean raw materials, safe foods, functional foods and gourmet foods. Finland's strengths in nutrition and food research and expertise in food diagnostics and packaging technology are keys to exports. Finnish service expertise, including food service innovations and a high level of gastronomy, should be linked to the promotion of exports and of tourism to Finland. Marketing Finnish food culture requires cooperation in the food industry cluster to strengthen the Finnish food brand and to provide actual channels for making Finnish products and services available.

Finnish food culture rests by tradition on a foundation of natural products, game and the produce of water and land. Genuine flavours, the northern climate, the clean natural environment and the pure waters are strengths in Finnish food and the images it engenders. Finnish cuisine is characterized by influences from both East and West, which further enhances the exotic character of Finnish food in the eyes of foreigners.

'Finnish food culture' is a broad concept involving the entire food industry, consisting of the food chain (primary production, food industry, trade, food services, consumer) and ancillary functions (research, training, guidance, authorities, organizations). The Finnish food industry has taken up the significant challenge of creating a national quality strategy under which the entire chain is committed to producing food that is of high quality and safe and tastes good — from field to table. The *Hyvää Suomesta* (Good from Finland) 'Swan Flag' symbol is a success story in itself. A quality strategy will enable the creation of national quality criteria for Finnish foods, ensuring that the food is safe, that the origin and quality of the raw materials are known and that the process is ethical. The quality chain strengthens the competitive advantage of the Finnish food chain and also gives an edge in the challenges posed by EU enlargement and the internationalization of trade.

Food exports only account for a few per cent of all Finnish foreign trade, but on the other hand the food industry has become well established,

particularly in the Baltic region and in Scandinavia, where there is now a market for Finnish food expertise. International studies show that there is growth potential for the demand in gourmet products, fresh foods and biodynamic foods.

Finland already has a strong international reputation in the development and research of functional foods, and an export-oriented cluster is emerging as a cooperation forum in the area of functional foods. So far, the market in functional foods has largely involved Southeast Asia, but strong growth is ongoing in other developed countries too. Finland is also known abroad for scientific nutrition research, and in recent years pharmacology and food diagnostics have also gained respect. In a recent OECD report, Finland's agricultural and food research was assessed to be of the highest quality. Finland is also internationally known for packaging and machinery technology.

Suomen Keittiömestarit ry. (the Finnish Chef Association) is an independent national organization which promotes and improves the professional skills and knowledge of its members. The Association is a member of the Nordic Chefs Association and the World Association of Cooks Societies (WACS). The chef team of the Finnish Chef Association acts as ambassadors for Finnish food culture in international competitions. There is international growth potential for such activities, and there is demand for appearances at the ever more frequent functions promoting Finland's image abroad.

Food can also serve as a tourist attraction when linked to tourism. In Sweden, food culture has been linked to national export efforts as a brand-builder (Food from Sweden) and as an added-value component for instance in the sales of conference services. Food culture is also prominently featured in the Government Programme in Sweden, and the Royal family is also actively involved in promoting exports. Food culture thus enjoys government protection and is supported by three ministries.¹⁶⁰

Recommendations for action:

- Set up a portal serving internationalization efforts in the Finnish food industry, as a cooperation

project within a food cluster;

- Set up a living, interactive food museum in Finland to present the history of Finnish food for instance with reference to changes in technology.

Youth culture

The Youth Division of the Ministry of Education, which has been supporting foreign tours of cultural groups of young people for 20 years, proposes the use of the *Nuori Kulttuuri* (Young Culture) system (known as Youth Art Festivals until the mid-1990s) as an export product. Such events have already been organized on the Nordic level as *Ung i Norden* (Youth in the Nordic countries) and on the European level as Art Connexion. In autumn and spring every year, young people or groups of young people are selected at *Nuori Kulttuuri* events to tour abroad to receive new impulses or as an incentive for the cultural efforts they are pursuing. A group selected for a foreign tour must have at least three members, and at least two thirds of the performers must be under the age of 29.

Grants are principally awarded to groups that have appeared at regional or national *Nuori Kulttuuri* events (or the earlier Youth Art Festivals) or that are involved in Finland's official youth exchange programmes. Different branches of the arts and culture are taken equitably into account, as is the distribution of target countries. The selection of groups is based on feedback from professionals on the performances of groups at *Nuori Kulttuuri* events, the broad range of expertise in the *Nuori Kulttuuri* committee, and CIMO expertise with regard to internationalization and multiculturalism. The system is not a competition but a mechanism for giving cultural groups of young people opportunities to travel abroad to perform and to learn new things.¹⁶¹

Recommendations for action:

- Set up the *Nuori Kulttuuri* system to network young people in an international and multicultural way;

- Select young cultural ambassadors every year within the *Nuori Kulttuuri* system to represent Finnish culture abroad and to promote cultural exchange.

Sports and recreation¹²⁷

Sports exports increase awareness of Finland abroad and promote models of recreation based on Finnish values. They may also have a significant impact on the national economy, regional economies and employment, for instance through tourism.

In the area of recreation, international activities are pursued by sports organizations, educational institutions, local authorities and private businesses. Central government also participates in international cooperation in recreation.

International sports events organized in Finland can be considered part of the export market. Even the selection process for hosting major sports events can be a significant marketing opportunity, with applicant countries given considerable exposure in international contexts. Several dozen international sports events are held in Finland each year. In 2002, the number of foreign countries sending representatives to such events varied between 4 and 100, depending on the sport and the event. Finland has a good reputation in organizing major sports events, but this expertise will decline if it is not kept up. Sports events bring international visibility through the media and through foreign visitors. For example, the World Championships in Athletics to be held in Finland in 2005 are expected to attract 4,000 athletes and team members from over 200 countries, 3,500 to 4,500 media representatives and anywhere between 5,000 and 20,000 sports tourists for a period of ten days. The event will be televised to 200 countries, with an estimated four billion viewers.

Under the championship sports strategy for 2003-2006, Finland must secure the potential for organizing major international events in as many sports as possible. In 2004, Oy Veikkaus Ab (the State-owned betting and lottery company) launched the Finngerprint project financed by sports organizations; one of its aims is to raise

awareness of Finnish sports to the highest international levels and to help Finland become the host for major sports and recreation events.

Finnish sports teams also participate in competitions abroad, showcasing Finnish sports competence. Many Finns are involved in expert duties in organizing international sports events. Federations for individual sports or related organizations also organize various mass participation events with foreign participants, such as the Helsinki Cup for young footballers, the Finlandia Hiihto skiing event and the Helsinki City Marathon.

Furthermore, 540 Finnish athletes are employed abroad in professional sports, mostly in European and American sports organizations but also in individual sports and motor sports. Finnish coaches are highly appreciated particularly in winter sports and athletics; about 60 Finnish coaches are employed abroad. There are about 300 Finns holding elected posts in international recreation organizations.

Finnish recreation models are also exported. There is international interest in the equality embodied in Finnish recreation; Finland is possibly the only country in the world where more women than men are involved in recreational sport. Finland has exported its equality approach to other countries, particularly during Finland's presidency of the Women and Sport organization in 1998-2000. For example, the equality principle now enshrined in Hungarian legislation was influenced by Finland. Another special feature in Finnish recreation is volunteer work, another model that has been successfully presented and copied around the world, for instance in the recreational reform in Estonia. Reforms related to taxation and social security of athletes and the 'Green Card' idea proposed by the Finnish Football Association have also attracted international interest, and so has the Finnish sports museum concept.

Team gymnastics and Nordic walking were developed in Finland. Team gymnastics is now practiced in 15 countries. Exel, the Finnish manufacturer of ski poles and rackets, was much involved in the development of Nordic walking

poles and has marketed its poles abroad too. Today, more Nordic walking poles are exported than are sold in Finland. In addition to the actual poles, Finland has also exported experiences in introducing Nordic walking campaigns, coaching know-how and general information on fitness sports. Nordic walking coaches have been trained for working in the Nordic countries, Estonia, Germany, Austria, Switzerland, France, Japan, the USA, Canada, Poland, the Czech Republic, New Zealand, Australia, Spain and Italy. It is estimated that there are over one million people in the world who regularly practice Nordic walking.

Finnish recreation education institutions also practice international cooperation through student and expert exchanges. Sports colleges have links with Sweden, Norway, Estonia, Britain, the Netherlands, France and Spain. Finns are also involved in international work in research in sport and physical education, for instance various conferences. Finnish expertise in research in sport and physical education is appreciated abroad.

The history and culture of recreation in Finland is also promoted through exhibitions touring abroad. Sports exhibitions produced by the Sports Museum of Finland and subsidized by the Ministry of Education or the Ministry for Foreign Affairs have toured Europe.

Recreation is also forming a part of development cooperation. The Finnish Sports Federation (SLU) and the Finnish Gymnastics and Fitness Association (SVOLI) trained over 30 volunteers in the recreation development cooperation project of the SCORE organization in South Africa between 1999 and 2002. Since then, the SLU has trained Tanzanian recreation professionals in Finland and Tanzania, repaired physical education venues in schools in Mtwara Region, trained personnel for maintaining those venues, and developed sports for girls in Mtwara. Sports Development Aid (LiiKe), supported by the Ministry for Foreign Affairs, has launched a project for supporting sports in school in Mtwara Region in Tanzania in 2004-2006.

Recreational tourism is an expanding field. The natural environment and outdoor recreation is the most important component of tourism to Finland.

According to the Finnish Tourist Board, about one quarter of foreign leisure travellers to Finland undertake outdoor recreation activities.

Many Finnish companies are major manufacturers and exporters of sports equipment and other products related to sports. Finland also exports expertise in the architecture, contracting and consulting of sports construction. Finnish special expertise in the design and contracting of sports venues include ski jumping and cross-country skiing centres, skating rinks and multi-purpose sports halls, and water sports centres. Exports in design and construction go mainly to Estonia, Russia and Hungary, and in the case of skating rinks also to Germany.

There is no comprehensive subsidy system for sports exports; financing is provided by the Ministry of Education, the Ministry for Foreign Affairs and EU programmes. Ministry financing totalled slightly over EUR 1 million per annum in 2000-2002 but decreased to slightly over EUR 750,000 in 2003.¹⁶²

Recommendations for action:

- Develop statistics on international activities in order to improve sports exports;
- Increase exports of citizens' activity models to neighbouring areas and to eastern Central Europe, and promote the use of sports in increasing awareness of Finland in general;
- Create a development programme subsidized by the Ministry of Trade and Industry to support sports construction exports. A programme is also needed for the product development and funding of international sports events to make better use of them. The Ministry of Trade and Industry should participate in financing these events too.

ITE art

ITE art (from the Finnish acronym for *Itse Tehty Elämä*, Self-Made Life) forms an interesting segment of folk art. ITE is a concept that refers to creative expression flourishing on the fringes of the official arts system and beyond, characterized by

idiosyncratic aesthetics, unconventional subjects and materials, and the channelling of creativity into aesthetic pursuits as part of the individual's life management strategy.¹²⁸ Visual folk art along these lines has emerged as a major art brand, for instance through the exhibition organized in Kaustinen in 2000 and at the Helsinki City Art Museum (Meilahti) in 2001. The ITE phenomenon has quickly gone international, and exports are in full swing — this year there have been exhibitions in London, Budapest and Italy, and next year there will be exhibitions in Paris and Moscow at least.

This internationalization is supported by a network centred on the project Contemporary Folk Art in Europe — Equal Rights to Creativity, a Culture 2000 project headed by the ITE Contemporary Folk Art Museum.¹²⁹ The project involves actors from Finland, Britain, Italy, Hungary and Estonia.¹³⁰ The project involves several international exhibitions, conferences, expert meetings, workshops and publications.

The ITE Contemporary Folk Art Museum was founded at the Kaustinen Folk Art Centre in 2001. The ITE Museum is studying the ITE phenomenon, assembling an ITE art collection, recording information on artists, presenting contemporary Finnish folk art in Finland and abroad and showcasing marginal genres of international art in Finland. It is also aiming to consolidate the position of an alternative, idiosyncratically national art form in Finland.

Libraries

Finnish libraries were the first in the world to introduce Internet access to their range of customer services, and the Finnish library portal www.kirjastot.fi has become an important information retrieval tool. Libraries have been using IT since the 1970s and are now moving into the fifth generation of technology. The precursors of the semantic web can be found in libraries.

Library Strategy 2010, published by the Ministry of Education in 2003, has been translated into a number of languages because of enormous

demand, and the library concept which it embodies is extremely highly appreciated internationally.

The Finnish library concept can be developed into an international top product by creating a comprehensive concept of civic information management where a new generation of information retrieval technology is linked to coordination and integration of information production and information service organizations. The information retrieval interface can be used to create a comprehensive real-time expert information service coordinated nationally and regionally for the needs of each citizen, involving all the various information service organizations. Markets for information search applications in mobile technology may be found in new EU Member States, developing countries and the emerging economies of Asia.¹⁶³

Recommendations for action:

- Develop an information search interface that guarantees citizens information management wherever they are (municipal libraries, national and regional information services, special libraries, university libraries, polytechnic libraries, public administration information service and e-transactions, subject directories);
- Enable multiple searches through the interface of libraries and all information search services on the Internet, etc. Develop a Finnish semantic web information search application from this approach. This will enable various types of search: searches can be submitted and results retrieved by phone, by PC, by e-mail, by chat, by mobile phone or by digital TV.

Museums

The Finnish Museums' Association is a national and international networking link and conveyer of information in the museum branch, offering dynamic, innovative expertise and practical services, training, publicity and publishing, development and research projects, and consultation. The Association represents the museum branch and

manages relations with its key interest group. According to a survey conducted by the Associations, museums have a variety of international activities — exhibitions, talks, lectures, seminars, publications and expert exchanges. Export volumes vary enormously from one museum to another. The international activities of museums are of cultural significance. Museum technology product development could also have export potential.

The Helsinki City Museum received a special commendation in the European Museum of the Year Award 2002 competition. The Museum participates in cooperation between the city museums of the Nordic capitals, in the Baltic Connection project involving the city museums of

St Petersburg, Tallinn, Stockholm and Helsinki, and in the EU Euroclio project involving 19 museums from 16 European countries and intended to increase awareness of the common European cultural heritage amongst the public at large through exhibitions, a databank and research on European history.

Aboa Vetus belongs to a Nordic network of Medieval museums with members from Sweden and Norway.

Natural science museums pursue close international cooperation in research for example by lending samples for use by scientists.¹⁶⁴

Cultural exports: the international operating environment

This section will take a brief look at the international operating environment for cultural exports, its potential market and competitive factors. The aim is not to provide a comprehensive picture of cultural export profiles and volumes for different countries or of how cultural exports are organized in the countries concerned. The lack of uniform criteria for assessing data on cultural exports and the different starting points and criteria in different countries would require an exhaustive international study on the subject in order to produce overviews which could feasibly be compared. In this section, the aim instead is to highlight information on market developments that may prove useful for Finland and on operating methods and good practices in different countries that may prove to be of strategic interest to us.

The world market for cultural production and cultural exports revolves round three poles: the global Anglo-American dominance over cultural exports, the European market and the emerging Asian market. Among these, growth is strongest on the Asian market. Where international capital investment is concerned, three-quarters of it is

directed into Asia at the moment, particularly China, India and Russia.

The most aggressive operator on the cultural exports market is the United States. In the 1990s, the copyright industry became the foremost export sector in the US. In the UK, cultural exports also have a solid tradition and it is the most successful country in cultural exports in Europe. This trend is well illustrated by the fact that in 1998, for instance, West End theatres spent GBP 26 million on royalties but only GBP 8 million on real estate. In the UK, the music industry has more employees and produces more income than the automotive industry, the steel industry or the textile industry.

The value of the creative economy came to a total of USD 2,240 billion worldwide in 1999, i.e. 7.3% of the world economy. The creative economy grows at a rate of about 5% per annum. By 2020, it is expected to grow to USD 6.1 trillion worldwide. Content production sectors which use technology are a particular growth industry in the creative economy at present.

According to the US Patent Office, the creative economy will create the foundation for economic

The size of the creative economy market in 1999 (USD billion)¹⁶⁸

Sector	Worldwide	USA	UK
Advertising	45	20	8
Architecture	40	17	2
Visual arts	9	4	3
Industrial design	20	2	1
Design	140	50	27
Fashion	12	5	1
Film	57	17	3
Music	70	25	6
Performing arts	40	7	2
Publishing	506	137	16
R&D	545	243	21
Software	489	325	56
Toys and games	55	21	2
TV and radio	195	82	8
Videogames	17	5	1
Total	2,240	960	157

growth in the future, while also generating a new global infrastructure.

It has been part of the fundamental philosophy of the European Union to create the right background for economic competitiveness with the United States and the emerging economies of Asia.

However, the EU has a long way to go before it can compete with the United States in cultural exports. Commercial US culture is present in every corner of the globe. According to the European Commission, content will be the growth engine for new technology, but so far, there is no common European strategy for cultural exports or the creative economy. It is the aim of the Lisbon Process within the EU to make Europe the world's most competitive knowledge-based society by 2010. However, culture is only mentioned in the conclusions of the European Council in Lisbon in one sentence. The EU's cultural and audiovisual sector programmes Media Plus and Culture 2000 do not focus specifically on cultural exports.

According to data from the European Commission, there are some seven million Europeans who earn a living in various sectors of

cultural production. The cultural industry is also labour-intensive by its very nature. As a consequence, it is fair to say that its job-creation impact is stronger than that of many other production sectors. Frederick Vincent, information officer at the European Commission's Directorate General for Education and Culture, admits that it is something of a problem that the EU does not have a common policy to support exports of cultural products by the Member States.¹⁶⁹

In the field of cultural exports, there are different types of market in different countries; a distinction can be made between mature markets and emerging markets. The potential of Finland as a remote country with a small population to compete with mature markets, i.e. powerful culture exporters such as the United States or the UK are limited. Competition in this area is very tough. From Finland's perspective, the strategic choice would be to focus on cultural exports to emerging markets. Such markets include the EU's new Member States, for instance.

In terms of Finland's competitive potential, the interesting market areas are Scandinavia and the

Baltic States, the countries on the Baltic rim, Russia, Germany, France, the new EU Member States, the Danube valley (Austria, Hungary, the Czech republic, Slovakia, Slovenia and Croatia) and China and India. South America is also a neglected opportunity where Finnish cultural exports are concerned.

In Asia, there have traditionally been strong Finnish cultural contacts with Japan, where there continues to be considerable potential for cultural exports. In China and India in particular, the field of high-technology products and applications such as the computer games industry, for instance, is growing rapidly. In these geographical areas, Finland's opportunities for cultural exports exist particularly in the fields of cultural production which use technology. Finnish cultural exports to China and India would require high initial investments and development of an export infrastructure in Beijing and New Delhi.

In the Scandinavian countries, the shared Nordic traditions and the principles of the welfare state help to create a good foundation for intensifying cultural partnership and exports. The Baltic Rim, the Baltic States and Poland are also interesting emerging markets for cultural exports and exchange from Finland's point of view.

New forms of cultural production and cultural exports in Russia are only now beginning to take shape after the fall of the Soviet Union and the subsequent collapse of the old structures and traditions. As yet, Russia does not possess a new infrastructure for culture, or a cultural strategy. Russia is, however, one of the most important recipients in the development of Finland's cultural exports. Cooperation with St Petersburg in particular, and the EU's Northern Dimension create interesting opportunities for Finnish cooperation projects and shared expertise.

In the new EU Member States, too, the old official propagandist 'state culture' has given way to powerfully emerging new forms of cultural production. The massive old 'cultural centres' have been closed and the strong link between cultural ministries and foreign affairs has been done away with. The new Member States have had to undergo

a sometimes painful process of dismantling the old state structures and create new, European strategies instead. In many countries the changes have been radical, but it has been a fruitful situation in that it has coincided with technological advances and changes in the economic structure.

Among the existing EU Member States, Finland's traditionally strong areas for cultural contact include particularly Germany, France and many others. Within the EU, some countries have an advantage in certain sectors of cultural production as lower value-added tax may be applicable to certain cultural products.

Starting in the 1990s, many countries have produced national strategies and guidelines for cultural production and cultural exports, with the aim of improving the respective countries' competitiveness on the growing world market for the creative economy. Outside Europe, for instance, Canada, Australia and New Zealand are strong cultural producers and exporters. Canada and Australia have also rapidly developed their information base and statistics on the creative economy and cultural production. Constantly updated statistics are available through excellent online services.

Proposed measures:

- Finland's cultural exports to the following areas should be developed:
 1. Russia
 2. Asia: China, India and Japan
 3. Scandinavia
 4. The Baltic States and the Baltic Rim
 5. The EU: the new Member States, Germany, France et. al.
 6. South America, Africa
- Over the next few years, there should be special focus on the following cultural export events:
 1. Expo 2005 "Nature's Wisdom", Aichi, Japan; a joint presentation of the Nordic countries
 2. 2006: Finland's next EU Presidency
 3. 2006 or 2007: Midem, Cannes

Cultural exports strategies in individual countries

Sweden

The most relevant country for comparison with Finland is Sweden. Sweden's strength in cultural exports is particularly popular music, which brings some EUR 500 million annually in export revenues.¹⁷⁰ Other key areas are design and literature. Leif Pagrotsky, Sweden's Minister for Industry and Trade, has also emphasized the importance of the experience industry, fashion and tourism.

Sweden's present government places a strong emphasis on growth policy and promoting Sweden's image abroad as a part of that. During 2004, Sweden will be studying its image in other countries, including an analysis of the image propagated by research, training, culture, politics, enterprises, products and tourism. Countries considered to be of particular importance in relation to Sweden's current image and work to promote it are China, Japan, Brazil, Russia, Poland, Germany, the UK, and the USA. Sweden's most important countries for comparison are considered to be Finland, France, Ireland, the Netherlands, Norway and Austria.

In December 2003, a report on the international promotion of Swedish culture, *Internationella kulturutredningen 2003*, was published in Stockholm. The report focuses on improving the effectiveness of Sweden's cultural exports and general export promotion.

The proposals in the report include a proposed change in the division of competencies between certain key ministries, the Ministry for Foreign Affairs and the Ministry of Culture and partially the Ministry of Education, which would mean that the Swedish Institute, which promotes awareness abroad of Sweden and its social system, culture and language, would have to relinquish a sizeable portion of its tasks to the Swedish National Council for Cultural Affairs. The latter, which comes under the Ministry of Culture, has hitherto operated specifically on the domestic market in Sweden,

promoting culture and distributing support on the domestic market.

The report states that it is difficult to evaluate what the central government's total annual input in international culture promotion comes to, but it summarizes the total funding of the key actors which came to SEK 314 million in 2002 (Ministry for Foreign Affairs, the Swedish Institute, Sida, Ministry of Education, the Swedish National Council for Cultural Affairs, the Arts Grants Committee, the National Archives, the National Heritage Board, the Swedish Film Institute, the Swedish National Concert Institute).

In the report and subsequent debate in Sweden, it has become very clear that Finland's hierarchically light-weight model for international culture promotion is held to be one of the examples. The low level of central direction, the separate information centres for each cultural sector and the economic and efficient operations of Finland's international institutes for culture and research have been held up as examples of Finland's strengths.

The key proposals of the report are:

1) Cooperation between the Ministry for Foreign Affairs and the Ministry of Culture should be intensified and a special unit for these ministries should be set up, with the task of coordinating all government input in international culture promotion in various policy sectors, and acting as a preparatory organ for the government in this area. A long-term strategy should be drawn up for Sweden's international culture promotion. Other ministries may take part in the work of the coordinating unit if necessary. This is justified by the growing importance of culture as a development factor in various policy sectors, for instance in helping to achieve the aims of foreign policy, economic policy and development policy.

2) A special international cultural fund should be set up in Sweden. The purpose of this fund would be to distribute grants in order to create new opportunities for the cultural sector to implement major international projects. The new fund would

be formally subordinate to the National Council for Cultural Affairs (which in turn comes under the Ministry of Culture). The starting capital of the fund would be SEK 10 million and the grants given out would be sizeable.

3) The Swedish Institute (subordinate to the Ministry for Foreign Affairs) would focus on its core areas, which are: information on Sweden and presentation of Swedish cultural and social traditions abroad, support for information distribution on and organization of events by various actors with the help of Swedish diplomatic missions abroad, support for Swedish language instruction abroad and responsibility for coordinating the operations of Sweden's international cultural and scientific institutions.

4) To be founded: an international centre for literature to which the present responsibilities of the Swedish Institute for translation grants for Swedish literature and general promotion of Swedish literature abroad would be transferred. The corresponding bodies in Finland and Norway are mentioned as possible models.

5) The National Council for Cultural Affairs would take on a key role in promoting and funding Sweden's international cultural relations. The aforementioned new bodies, the international cultural fund and the international centre for literature will be set up within the National Council for Cultural Affairs in terms of organization. It is also felt that shared premises for the Swedish Institute and the National Council for Cultural Affairs would be an efficient and economic solution.

6) The role of the Arts Grants Committee in international cooperation will be reinforced. The function of the Committee is to support individual artists to live and work abroad. The international IASPIS exchange programme (International Artists Studio Program in Stockholm) which the Committee has developed and maintained successfully in the field of the visual arts will be

developed, reinforced and expanded to include other art forms as well.

7) A new network should be founded for Sweden's International Institutes for Culture and Research. The aim is to intensify the cooperation between the eight existing institutes, which are each very different from each other. One of the institutes is the Hanasaari Swedish-Finnish Cultural Centre in Finland (subordinate to the Ministry of Culture). The Finnish system is proposed as a possible model, constructed of independent institutes for culture and science which work together.

8) The report emphasizes the importance of greater flexibility than hitherto, both in the placement of posts for cultural counsellors at embassies and in terms of the length of their terms of office. Half the posts should be for 'roving cultural counsellors' so that they could be allocated for a fixed term to countries where special efforts are needed. The work of the cultural counsellors would be planned well ahead (3-6-year periods) with a comprehensive strategy aimed at promoting the best interests of both culture and Sweden's economic policy interests. The strategy would be drawn up by the Ministry of Culture, the National Council for Cultural Affairs, the Ministry for Foreign Affairs, the Swedish Institute and in certain cases, the Swedish International Development Cooperation Agency (Sida), which will be assigned the task of improving cultural cooperation with developing countries.

9) The Swedish National Concert Institute will retain its present responsibilities for international cooperation and participate in developing the IASPIS exchange in the area of music. The sum needed for setting up one new post will be transferred from the support received by the Concert Institute to Export Music Sweden.

The report points out the importance for Sweden of exports of pop and rock music. Export Music Sweden does not have a continuous public operating grant, but the report suggests that one

post should be funded on condition that the organization takes part in Sweden's continuous export promotion operations.

The report also points to the film policy responsibilities of the Swedish Film Institute and its role as the foremost international promoter of Swedish film. The report emphasizes commercial policy perspectives which preclude the Swedish Film Institute from cooperating exclusively with cultural institutes and actors which promote the image of Sweden. The operations of the Swedish Film Institute demand that it also work with export promotion organs.

10) The report proposes that cultural issues should be given much greater weight than at present in the foreign affairs administration. The qualifications of the people dealing with press, information and cultural questions should be improved.

11) The Ministry of Culture will investigate whether it would be justified to set up an international unit in order to ensure its own competency. It is essential that the Ministry of Culture should be in charge of guidelines and strategies for Sweden's international cultural operations. The Ministry of Culture together with the other ministries should work together to decide on Sweden's cultural policy operations in the EU, Unesco and the Council of Europe, perform analyses of the operating environment and follow developments in international treaties and directives.¹⁷¹

Norway

In Norway, organization and funding of cultural exports has been concentrated on the Section for the Promotion of Norway and Norwegian Culture Abroad at the Norwegian Ministry of Foreign Affairs, which works together with the other ministries and other bodies involved.

The three fundamental pillars of Norway's cultural exports are quality, continuity and centralization. In its cultural exports, Norway does

not invest in classic artists who are already well-known, but in new and innovative quality culture. Cultural cooperation focuses primarily on the USA, Germany, France, Sweden, Japan and the UK. In 2003, the UK was Norway's special focus in cultural exports.

Although Norway has involved a number of different organizations and bodies in the work on developing cultural exports, the lack of statistical information on this sector is one of the greatest problems and challenges. Statistics on cultural sector enterprise were published for the first time in 2002.

According to the publication *Official Statistics of Norway*, the culture and sports sectors have boosted their share of exports considerably in recent years, reaching a total for both sectors of NOK 524.7 million in 2001.

There are three state agencies in charge of Norway's foreign policy cultural operations: the Norwegian Ministry of Foreign Affairs, the Norwegian Agency for Development Cooperation (NORAD) and the Norwegian Ministry of Culture and Church Affairs. NORAD is in charge of cultural cooperation with developing countries while the Ministry of Culture and Church Affairs is in charge of cultural cooperation with the Nordic countries, Unesco and the EU. The unit chiefly responsible for cultural exports abroad is the Section for the Promotion of Norway and Norwegian Culture Abroad at the Norwegian Ministry of Foreign Affairs in cooperation with organizations working in the sector. The Section is supported by expert organs in certain cultural sectors. In 2003, the Norwegian Ministry of Foreign Affairs used NOK 30 million for the promotion of Norwegian culture abroad. Norway does not have a network of cultural institutes abroad. As a consequence, the Norwegian embassies and their ambassadors, consuls and press and cultural counsellors are the most important cooperation partners of the Ministry of Foreign Affairs and its representatives abroad.

Innovation Norway (Norway's export and tourism promotion agency) has also focused on boosting cultural exports. In 2003, Innovation

Norway received NOK 5 million from the State budget for the development of the creative economy. A further NOK 18 million is earmarked in this year's budget for the same purpose. Innovation Norway focuses particularly on new product ideas and talent./172/

Denmark

Over the past few years, Denmark has begun to focus more attention on the opportunities offered by cultural and experience exports and the country's support system for culture has been overhauled.

Like its predecessors, Denmark's present Government has emphasized the importance of the culture and experience industry for the country's economy and in terms of exports. In September 2003, the Danish Government published a report entitled *Denmark in the Culture and Experience Economy — 5 new steps*, which highlights the economic and job-creation impact of cultural exports. Three years before, the previous Government had published an extensive report on Denmark's creative potential, focusing on the importance of bringing together the interests of the cultural sector and the business sector at large and drawing on them for cultural exports, too.

The Danish Government's report on the cultural sector from 2003 contains the following statistics, among others:

- 10,300 enterprises, i.e. 3.8% of all Danish enterprises
- turnover of about DKK 80 billion, i.e. 3.7% of the turnover of all Danish enterprises
- total exports came to DKK 15.5 billion, i.e. 2.8% of Denmark's total exports
- full-time employees 63,400, i.e. 4.3% of all employees in the private sector
- turnover had grown by 10% on 1998.

In 2000, the value of Danish music exports came to DKK 827 million. The corresponding figure for 2002 was DKK 588 million. Exports of Danish literature are calculated to bring in some DKK 300 million annually. The visual arts come to DKK 200

million a year. The total turnover of the entire cultural and experience economy came to about DKK 175 billion in 2000, corresponding to about 7.3% of private sector turnover. Exports accounted for about DKK 68 billion of this, i.e. over 16% of Denmark's total exports.

A complete reform of the support system for culture was carried out in Denmark in 2003 and cultural exports operations were overhauled at the same time. Overall responsibility for Denmark's cultural exports and promotion of Danish culture internationally rests with the Danish Ministry of Culture and the Ministry of Foreign Affairs. In 2001, these two ministries entered into a cooperation agreement for promoting Danish culture internationally, with the aim of ensuring that the operations of all those involved in cultural exports are coordinated. The agreement also gives an outline for cooperation between organizations coming under the Ministry of Culture, which promote culture and Denmark's diplomatic missions abroad.

Under the new system, support for arts and artists is distributed by the Danish Arts Foundation (artists' grants, travel grants and public acquisitions of works of art), the Danish Arts Council and the arts councils subordinate to it and centres for various art forms (development of art and the arts scene and promotion of Danish art abroad).

The Danish Arts Agency acts as the secretariat of the Danish Arts Foundation and the Danish Arts Council, and one of its tasks is the coordination of international cultural exchanges. In connection with the reform, a special international unit was founded at the Danish Arts Agency for the promotion of Danish culture abroad.

A considerable portion of the Danish Arts Council's funds for international operations is channelled into the Danish Arts Agency's centres for the visual arts, literature, music and theatre.

The Danish Cultural Institute operates with funding from the Government and other public sources, as well as private donations. There are Danish Cultural Institutes in nine countries, which play an important role in the promotion of Danish culture abroad. In May, Denmark will open the

first foreign cultural institute in China (Beijing).

In 2004, DKK 8 million has been allocated to cultural exports projects by the Danish Arts Agency's international unit. A further DKK 15 million has been set aside in the 2004 budget for the international operations of the visual arts, literature, music and theatre centres coming under the arts administration.

The body in charge of export promotion in Denmark is the Danish Trade Council, which comes under the Ministry of Foreign Affairs, and whose task also includes the promotion of commercial cultural exports.

The attitude to cultural exports is the same as to all other exports. Thus far, the aim has been to give cultural export subsidies for participation in various joint events, such as fairs. As an example, the Danish Trade Council provided support of about DKK one million for Denmark's high-profile participation in the MIDEM music fair in 2004.¹⁷³

The United Kingdom

The history and traditions of the United Kingdom are the background to the country's natural ability to draw on its multiculturalism, something which is at the heart of the success of the country's creative economy. The UK has also mastered the conceptual framework for developing cultural production, intellectual capital and the creative economy on a global scale, and also the ability to create functional structures and models for such development work. The government strongly emphasized the economic significance of the experience industry and the creative economy in the late 1990s as a source of new jobs and economic growth. A determined cultural course was set in the UK. In 2001, there were about 1.3 million jobs in the sector and the turnover stood at EUR 160 billion.

The BBC, a public service corporation, is the world's foremost cultural exporter, and includes subsidiaries which operate according to commercial principles, such as BBC Worldwide, BBC News, BBC online and BBC Sport. The BBC's products range from radio and television programmes, film and documentary production, through satellite

channels, multimedia, videos, online Internet services, magazines, books and other products. BBC World reaches 255 households in over 200 countries.

The UK has a strongly instrumentalist cultural policy. The 'job description' of the Department for Culture, Media and Sport (the counterpart of the ministries of culture in the Nordic countries) is the most comprehensive in the world: arts, culture, tourism, youth, sports, broadcasting, gambling, the national heritage, leisure time etc. The DCMS is also in charge of strategic planning and development concerning cultural exchanges and cultural exports in the UK. In 2002, the DCMS founded partnership groups together with the Department for Trade and Industry, other ministries and business sector and foreign trade organizations (UK Trade and Investment) in order to promote cultural exports. These include the Creative Exports Group (CEG), Performing Arts International Development (PAID) and Design Partners. In addition, the Creative Exports Group has set up five sectoral working groups: for film, television, radio, publishing and music. PAID, which develops international exchange in the performing arts, works to promote the international visibility of performing arts organizations, anything from small theatre groups to major musical productions. PAID's members consist of the main institutions in dance, theatre and music. Research and development work holds a key role in the work of all three groups.

The British Council, a non-departmental public body sponsored by the Foreign and Commonwealth Office, promotes the country's culture internationally in a more general sense, as well as promoting awareness of British Commonwealth culture abroad. The British Council is also active in promoting international trade and together with the DCMS and UK Trade & Investment, it has opened a portal at <http://www.creativexport.co.uk>, which provides guidance for cultural industry entrepreneurs who take an interest in the various sectors of the international cultural trade.

Visiting Arts is an educational charity, jointly

funded by the Arts Council of England, the Scottish Arts Council, the Arts Council of Wales, the Arts Council of Northern Ireland, the Foreign and Commonwealth Office and the British Council. Visiting Arts promotes international exchanges of artists and arts events and takes part in international research and development in arts and culture. Thanks to extensive consulting operations in arts and culture, the UK is the leading European state in terms of research and development in arts and culture and in cultural exports.

The Arts Councils naturally also support international exchanges and cooperation between institutions and individual artists, but the key strategic export actions belong to the DCMS and the Department for Trade and Industry, and to UK Trade & Investment.

The export revenue from the creative sectors came to GBP 11.4 billion in 2001, the equivalent of 4.2% of the total exports of goods and services. From 1997 to 2001, exports in this sector grew by as much as 15% per annum.¹⁷⁴

All the important operators in the cultural exports sector in the UK have different aims and different strategies. The number of operators is growing rapidly, too, due to the following factors: a) the increased economic significance of the cultural industry and the subsequent need for support/promotion from public institutions (DTI, UKTI); b) the redistribution and decentralization of authority and the founding of new regional offices; and c) the efforts of traditionally domestic operators to reach the international market.

The decentralization of authority within the UK is a significant factor when you examine cultural exports. For instance, the attitude to cultural exports in Scotland is both very clear and distinctly different from that in London, and the DCMS is not — with the exception of public service broadcasting — responsible for the cultural sector in Scotland, Northern Ireland or Wales. The regional aspect is also visible within England; as an example, northeast England is enthusiastically in favour of internationalization. It has an aggressive export policy which is also closely linked with regional political and economic issues instead of

being purely focused on culture. Wales has a similar approach to cultural exports, and presents a convincingly targeted and goal-oriented programme on, for instance, what it hopes to achieve in the new EU Member States.

The British Council is an independent operator in the cultural sector, which promotes an up-to-date and multifaceted image of the UK abroad. The British Council's annual budget is GBP 17 million and it has 6,000 employees. In 2004, its turnover came to GBP 479 million, of which state support accounted for GBP 164 million. It has operations in 110 countries and 216 offices. It has arts managers in over a hundred countries, who follow the local art scene and organize events. The British Council particularly supports travel abroad by the most talented artists, performances or cooperation with artists from other countries — to a total of about two thousand events per year. Sometimes it funds an entire tour alone, but it usually focuses on helping to find sponsors and offering help and advice.

The UK has also developed a useful Business Link online service at <http://www.businesslink.gov.uk/bdotg/action/home>, which also includes services which benefit cultural production.¹⁷⁵

Ireland

The cultural sector in Ireland has a high reputation internationally. This is particularly interesting in light of the fact that the Irish government did not actively begin supporting cultural exports until recent years. Traditionally, culture and cultural producers were supported above all with tax reductions and this practice continues despite the improved wealth of the country.

The Cultural Division of Ireland's Department of Foreign Affairs works together with the country's diplomatic missions abroad to implement cultural projects and support Irish studies at universities and educational institutions abroad. It also takes part in cooperation within international cultural agreements and bilateral student exchanges. Ireland has no cultural institutes abroad, and there are no plans at present for founding such institutes. The

only exception is an institute operating in Paris, which is part-funded by the Department of Foreign Affairs.

The Arts Council of Ireland is an independent body coming under the Department of Arts, Sport and Tourism, which supports development of cultural and artistic operations in Ireland. It helps individual artists and artists' organizations in arts exports by providing travel grants and other forms of grants. It is also the main information provider in international matters both for actors operating in Ireland and to parties abroad with an interest in Ireland. International work is undertaken in cooperation with the diplomatic missions abroad and international partner organizations. The Arts Council supports international operations with funding of about EUR one million this year.

The Cultural Relations Committee supports Irish cultural activities of significant professionalism and impact (dance and theatre, film, music, visual arts, literature) abroad by giving out grants. The Committee formerly operated in connection with the Cultural Division of Ireland's Department of Foreign Affairs but has since been transferred to the Department of Arts, Sport and Tourism. The Committee's budget for 2004 is EUR 700,000.

Ireland's cultural export organization is characterized by a rather informal structure. There are no extensive strategies, long-term goals or plans, and instead demand guides operations. Recent comments from the Arts Council have drawn attention to the lack of continuity in cultural exports. It is felt in art circles that the model in use for instance in Australia, Canada and Singapore, based on a cultural council which coordinates international operations, could work for Ireland, too. It would probably include other authorities promoting the country and its image, such as the tourist board.¹⁷⁶

France

Cultural exports are a deliberate means of maintaining and boosting France's influence. For that reason, it has been relatively generously supported with state funding. In the words of

Xavier North, Director of Cooperation, Development and Francophony at the French Ministry of Foreign Affairs, "the emergence of the network of French cultural centres in the mid-1900s was a consequence of a policy chosen by General de Gaulle, striving to replace the country's waning economic and military influence". In its international operations, France's priority is still to shield culture from the market forces which are felt to work in favour of the English-speaking world.

The foremost function of cultural exports is to promote the position of the French language worldwide. This is chiefly pursued through language instruction and French schools. Most of the subsidies from the public sector are also channelled into this. French-language radio and television operations are also supported with the same goal in mind.

The second function of cultural exports is to disseminate French culture across the world. It is difficult to estimate the overall volume of both commercial and non-commercial cultural exports, as there are no compiled figures available and there are certain to be considerable sums of public funding involved in the commercial statistics, too. In recent years, the goal of French international cultural policy has been defined as 'ensuring cultural diversity'.

France's cultural exports are chiefly the responsibility of the Ministry of Foreign Affairs, but the Ministry of Culture is also involved. There is a common operator in cultural exports in France, the AFAA (Agence française d'action artistique) founded in 1922, responsible for exports of performing arts, visual arts, industrial design and architecture. Literature, film and audiovisual production are handled by the Ministry of Foreign Affairs directly. Cultural exports in foreign countries are handled by the network of institutes called Centre Culturel Français (of which there are 151), which are subordinate to the respective French Embassies, the Alliances françaises (of which there are 295, in partnership with the Ministry of Foreign Affairs) and the Embassies' own Services de coopération et d'action culturelle), of which there are 170.

An allocation of EUR 189 million was made in the 2002 budget of the Ministry of Foreign Affairs to audiovisual production and communications technology, including TV5 and RFI (Radio France Internationale), EUR 202 million for cultural cooperation and promoting the French language, and EUR 314 million for maintaining French schools abroad. Support for culture thus came to a total of EUR 705 million.

In 2002, translation rights for 4,698 French books were sold abroad compared with 5,736 in 2000, which indicates a falling trend. Exports of books in French, meanwhile (EUR 627 million), continues to focus increasingly on Francophone countries, while demand elsewhere is flagging. An international comparison of the total figure for publication rights and book exports puts France in fourth place with an 8% market share (compared with the USA's 21%). France has a 6.4% market share of record sales, with 80% of exports going to Europe.

France is strongly advocating a higher priority for culture in the European Union. A clause on respect for the wealth of cultural and linguistic diversity and protection and promotion of the cultural heritage has been included in the draft Constitution Treaty in consequence of a proposal from France. In this way, France hopes to ensure constitutional protection for support for the media and the cultural industry of both the national and EU level.

In the EU, France has also proposed a 16-point programme which includes proposals for significantly raising the Union's cultural appropriations from the present 0.1%, which comes to only EUR 120 million in a Union with 25 Member States. An increased appropriation could serve to encourage the mobility of artists and works of art to an extent that would turn the Union into an area of European culture. France also wants the Union to approve national appropriations for the support of culture and audiovisual production. It is hoped that the present regulations on national subsidies can be given an extended period of validity until 2009. Also, much more forceful measures should be taken to combat pirating of

sound recordings and films, and VAT in the sector should be lowered.¹⁷⁷

Germany

Compared with many other countries in Europe, Germany has a different model for the administration of culture, science and education, for historical reasons. Germany is traditionally divided into Länder which each had their own cultural policy. Germany is now striving for nationwide guidelines on cultural policy, however. To this end, Kulturstiftung des Bundes was founded at the end of 2003. In Germany, the decentralized cultural activity which emphasizes the independence of the Länder is seen as a resource, however. The wealthier Länder in particular, such as Bavaria, want to continue to pursue their own cultural policy. On the other hand, the complex hierarchy of the cultural administration and its duplication for 16 Länder are giving rise to enormous costs and also make it difficult to introduce innovations in areas such as education.

The cooperation body of the Länder is the Ständige Konferenz der Kulturminister der Länder, in Berlin, which coordinates policy in the cultural and education sector and international cooperation.

The most visible proponent of German cultural policy abroad is the Goethe Institut, which operates in 126 locations in 77 countries. Funding for the Goethe Institut's operations comes from the budget of the German Foreign Office. In addition to this, the Institute also raises some funds itself through, for instance, fees for language courses, and also receives some support from sponsors and other supporters.

The other main body involved in international cultural cooperation is DAAD, an organization in charge of Germany's academic researcher exchanges, with 45 information centres and 13 offices all over the world. DAAD acts as an intermediary in EU exchange and mobility programmes on European educational policy. International cooperation is also pursued by the Alexander von Humboldt Foundation, Germany's UNESCO Commission and

the IFA (Institut für Auslandsbeziehungen).

In the media, the programmes of Deutsche Welle (the DW television and radio station and the television channel 3-SAT) are part of Germany's cultural exports. In practice, the channel is visible all over the world with different language versions (German, English, Spanish, Arabic).

On the federal level, the Commissioner for Cultural and Media Affairs (Beauftragte der Bundesregierung für Kultur und Medien) also takes part in cultural exports and funding for it. In addition to these bodies, cultural exports are also funded by certain other federal ministries.

Numerous other organizations are also involved in cultural exports: the Filmförderungsanstalt (film institute), within which film exports are handled by the marketing company German Films — Service and Marketing GmbH, formerly called Die Export-Union des deutschen Films. A company to deal with German music exports, German Sounds AG, was founded at the end of 2003.

The Bundestag committee, Kultur in Deutschland, started operations in autumn 2003. Its task is to produce an overview of the present state of culture and to acquire information on public and private support for culture.

Although the federal government is strongly involved in cultural exports, cultural affairs still fall primarily within the sphere of competence of Germany's 16 Länder. The Länder have their own cooperation body, the Ständige Konferenz der Kulturminister der Länder (KMK), which acts as representative of the Länder in international cultural policy.

So far, it is difficult to obtain information on public funding for culture in Germany, not to mention funding for cultural exports. In 2004, however, there are plans for publishing a joint report by the Länder and the federal government on funding for culture. The report will also contain statistical information. It is estimated that public bodies in Germany fund about 90% of cultural expenditure. Various foundations give out about EUR 306 million to culture, i.e. 4% of the total funding for culture. It is estimated that the total sum used for cultural sponsorship by the five

hundred biggest enterprises is EUR 511 million at most. The costs for cultural exports have not been calculated separately. The federal budget for German cultural exports has been cut by 4% for 2004, from EUR 558 million in the 2003 budget.¹⁷⁸

The United States

The powerful position of the USA in the world is based on its status as a commercial culture superpower, as well as its political and economic power. In the United States, culture and entertainment are the biggest export sector, at 7.8% of GDP. The USA is the biggest market area in the creative economy sector. The value of the sector in the USA was USD one trillion in 2000. The growth rate of the copyright industry was 6.3% annually during the period 1977-1997, or more or less double the rate of the economy as a whole, which stood at 2.7% annually. In 1999, the copyright industry had 3.8 million employees, the equivalent of 2.9% of the workforce. The USA is also world leader in terms of the number of patents, with 169,000 patent registrations in 1999.

However, the USA also engages in cultural exports with government support. The US Department of State has numerous programmes for promoting American art abroad. The State Department helps Hollywood in film export projects. The State Department Feature Film Service supplies American films to film festivals and other film events. Art has been promoted through the Art in Embassies programme at the 180 or so US embassies around the world. The programme was expanded further in 2002 through the American Artists Abroad project.

There are a number of funds supporting art exports in cooperation between the public and private sector. The Festival Fund ensures that American visual artists are able to participate in international art festivals. The fund receives allocations from the State Department and from sources such as the Rockefeller Foundation. There is also a separate fund for exporting exhibitions. There

is a fund for performing artists which supports the participation of musicians, dancers and theatre professionals in international events.

Cultural exports also has a political agenda. The aim of the State Department is to promote American values. The most obviously political cultural export project is CultureConnect, started in early 2002 with the aim of boosting sympathy for the Americans in the aftermath of 9/11. The programme focuses on young people aged 12-25, and on breaking down stereotypical views of American culture. Special Cultural Ambassadors representing different sectors of art have been appointed to implement the programme.¹⁶⁹

Canada

Canada is a federal state made up of provinces and territories, and has cultural organs on various administrative levels. The provinces have separate appropriations and cultural programmes; the province of Quebec, for instance, has a distinctive French culture and an extensive international cultural exchange programme. Canada is also among the few countries which are members of both the British and French international community. Both of these have a strong cultural dimension.

The Canadian government put forward a proposal on a New International Instrument on Cultural Diversity (NIICD) in 1999. The purpose was to create a clear strategy for the international promotion of culture, aiming to:

- ensure the position of Canadian culture on the domestic and foreign market.
- support companies and investment opportunities, consumer choice and cultural pluralism.
- secure artists' and entrepreneurs' training and working requirements so as to give them opportunities for success both at home and abroad.

The main responsibility for international cultural policy lies with the Department of Canadian

Heritage, which in turn funds the Canada Council for the Arts. The International Cultural Relations Program of the Canadian Department of Foreign Affairs and International Trade supports the cultural sector. Canada has special cultural promoters in five strategically important locations. The budget for international cultural promotion of the Department of Foreign Affairs and International Trade was CAD 29 million in 2002. Other cultural exports actors in Canada include the Canadian Cultural Observatory, the Cultural Human Resources Council and the Cultural Industries Development Fund of the Business Development Bank of Canada.

The value of Canada's international trade (exports and imports) in cultural commodities came to CAD 3.5 billion in 2001, an increase of 5.6% on the previous year.

Canada has developed continuous cultural statistics and analyses of them, available on the website <http://www.statcan.ca/english/freepub/87-008-GIE/about.htm>.

In 2003, the Atlantic Canada Opportunities Agency (ACOA) put forward an initiative concerning the creation of a Pan Atlantic Cultural Strategy. Work on the strategy is led by the Pan Atlantic Cultural Export Planning Committee (PACE). The aim of the strategy is to support economic growth in Canada.¹⁷⁹

Australia

In 1998, the Australian Department of Foreign Affairs and Trade arranged a cultural relations summit, which resulted in the founding of the Australia International Cultural Council, whose purpose is to create three-year strategies for the promotion of cultural production and cultural exports, and coordinate operations between the public and the private sector.

According to the strategy currently in force, Promoting Australia's Culture Abroad 2000, Australian culture is a key aspect of the government's international agenda. The strategy coordinates and forcefully promotes cultural exports as a part of Australia's foreign and economic policy.

The strategy recognizes the country's need for special promotion of culture. Its key aims include:

- to promote and coordinate the exports of arts of a high standard,
- to develop cooperation between government organizations and commercial cultural operations in the international promotion of culture,
- to improve access to information on Australian cultural products,
- to expand the international market for Australian culture and art with the help of export promotion,
- to create contact interfaces and links between cultural producers and foreign operators and sponsors,
- to integrate cultural exports with government export promotion programmes,
- to create and maintain statistics and market research,
- to include representatives of cultural production in national trade policy and export organizations, for instance the National Trade Consultations (NTC).

Austrade (<http://www.austrade.gov.au/>) is an agency which promotes Australian cultural exports. It runs an Export Market Development Grants Scheme which helps cultural enterprises with market analysis of other countries and provides a continuously updated website. The website gives basic information on different markets and country profiles. Cultural production and exports are also included in the government's trade policy reports to parliament.

The main actors in cultural exports are the Department of Foreign Affairs and Trade, the Department of Communications, Information Technology and the Arts, DoCITA and the Australia Council.¹⁸⁰

Japan

In Japan, there are two main bodies involved in cultural exports: the Agency for Cultural Affairs (ACA), which comes under the Ministry of Education, Culture, Sports, Science and Technology (MEXT), and the Japan Foundation. The ACA has a number of international programmes through which it supports exports of Japanese culture abroad. In addition to the ACA, the various ministries may have cultural projects of their own. For instance, the Ministry of Economy, Trade and Industry (METI) has chosen to take on the task of supporting exports of Japanese animation, or anime, abroad. The annual budget of the ACA exceeded JPY 100 billion (= about EUR 750,000,000) for the first time in the financial year 2003.

The Japan Foundation has ceased to be subordinate to the Ministry of Foreign Affairs in the sense that, although the Ministry still supervises it, the Foundation is now fully responsible for its own practical operations. Further reforms will be undertaken at the Japan Foundation in April 2004, when the Foundation's new financial year begins. The reforms are part of the Japanese government's programme for privatising public institutions.

The Japan Foundation specializes in international cultural exchanges, and has numerous different types of cultural exchange agreements, concerning aspects such as Japanese language instruction, arts, publishing, and sports. Most of the operations of the Japan Foundation are state funded, but some funding also comes from the private sector. The Japan Foundation has many different programmes which provide opportunities for researchers and experts in various fields to travel abroad. Opportunities are also arranged for foreign experts in various fields to come to Japan on study tours or on scholarships. For instance, the Japan Foundation provides grants for Japanese language teachers to go abroad. Courses for foreign teachers of Japanese are also arranged in Japan. Various exhibition programmes exist to present Japanese art abroad, and visits by foreign artists to Japan are also funded.

The report of a working group appointed by the

ACA to study international cultural exchanges was completed in March 2003. The idea was to consider the role of Japan in a changing world. The report emphasizes openness, flexibility and interaction, and it highlights the following points:

a) In addition to traditional Japanese culture, it would be well worth introducing contemporary Japanese art internationally.

b) Presentations of Japanese culture abroad or to foreigners in Japan should be carefully tailored to the target audience.

c) The view of Japanese culture given to foreigners should be as accurate as possible. Japanese culture is not necessarily unchanging or uniquely different from everything else; in the future, cultural exchange should be interactive.

d) The Japanese themselves are not the only ones in the world who care about and keep up Japanese cultural traditions such as the tea ceremony, ikebana or judo; in fact, there are vast numbers of people in the world who are not of Japanese extraction but who nonetheless are familiar with and even study Japanese culture.¹⁸¹

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- Aav, Marianne, Director, Design-museo
- Aho, Esko, President, SITRA
- Ahokas, Harri, Head of Distribution, SES
- Ahokas, Paulina, Director, Music Export Finland
- Airaksinen, Pirjo, Channel Manager, Nelonen (Finnish channel 4)
- Alanen, Aku, Statistics Finland
- Alanen, Juhani, Managing Director, Tampere Film Festival
- Alanne, Esa, Director, Finnish Institute in Copenhagen
- Alaspää, Arto, Executive Director, Finnish Group of the IFPI (ÄKT)
- Amberla, Kai, Executive Director, Finnish Music Information Centre (FIMIC)
- Andersson, Kristina, Departmental Secretary, Ministry for Foreign Affairs
- Anhava, Ilona, Galerie Anhava
- Anttila, Esa, Head of Marketing, M.Sc.(Econ.), Chef, University of Turku, Continuing Education Centre
- Arkio, Tuula, Director, Finnish National Gallery
- Aro-Valjus, Sanna, Representative, Finnish Institute in the Middle East
- Autio, Iiris, Producer, Tero Saarinen Company
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www.gramex.fi

Filmkontakt Nord
<http://www.filmkontakt.dk/>

Kopiosto
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Foundation for the Promotion of Finnish Music (LUSES)
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Music Export Finland (MUSEX)
www.musexfinland.fi

Finnish Film Archive
<http://www.sea.fi/>

Finnish Film Foundation
<http://www.ses.fi/>

Finnish Literature Information Centre (FILI)
www.finlit.fi/fili

Finnish Music Information Centre (FIMIC)
www.fimic.fi

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www.danceinfo.fi.140

Appendix 1. Cultural labour force in 2000

According to census data, there were altogether about 114,200 people employed in cultural professions and in cultural branches in Finland in 2000, or slightly over 5% of the employed labour

force. This figure is adjusted for overlap (about 41,300 persons were employed both in a cultural profession and in a cultural branch).

TABLE 1. Employed labour force in cultural professions according to census data for 1995 and 2000

Professional group	1995 number	2000 number	Change %
Visual arts, design and handicraft	11 379	11 678	2,6
Editorial work	7 797	9 187	17,8
Photography, film, radio and TV technology	4 513	4 824	6,9
Graphic art	17 613	17 345	-1,5
Advertising	6 121	12 206	99,4
Cultural administration, libraries, archives and museums	9 730	10 520	8,1
Cultural professions total	57 153	65 760	15,1
Entire employed labour force	1 932 752	2 228 557	15,3
...of which cultural employees (%)	3,0	3,0	

Source: Statistics Finland

TABLE 2. Employed labour force in culture branches according to census data for 1995 and 2000

Culture branch	1995 number	2000 number	Change %
Architecture, industrial design and visual arts	3 327	5 374	61,5
Arts institutions	4 726	5 767	22,0
Art and antique shops, and second-hand bookshops	396	444	12,1
Libraries, archives, museums, etc.	9 516	9 780	2,8
Book production and distribution	4 044	4 899	21,1
Newspaper and magazine production and distribution	27 847	29 290	5,2
Advertising	4 767	8 470	77,7
Photography	3 015	3 266	8,3
Radio and TV	11 459	13 982	22,0
Film and video production and distribution	1 391	2 387	71,6
Music and recording production and distribution	992	1 154	16,3
Amusement parks, games and other entertainment and leisure	3 992	4 894	22,6
Culture branches total	75 472	89 707	18,9
Entire employed labour force	1 932 752	2 228 557	15,3
...of which culture branches (%)	3,9	4,0	

Source: Statistics Finland

Exports of services by businesses in the culture and mass media branches according to the foreign trade survey of Statistics Finland

This memo addresses exports of services by businesses in the culture and mass media branches according to the foreign trade survey of Statistics Finland. The survey itself is briefly outlined and assessed from the point of view of recording statistics for exports of culture and mass media.

The survey of foreign trade in services conducted by Statistics Finland showed that businesses in the culture and mass media branches had a combined income from service exports of EUR 50 million in 2002. The greatest part of this, EUR 28.7 million, was accounted for by advertising agencies, followed by magazine publishers (EUR 5.2 million), newspaper publishers (EUR 4.4 million), radio and TV (EUR 4.5 million) and architectural services (EUR 3.1 million). The survey showed that the combined value of culture and mass media services exports had increased by a few million euros between 2000 and 2002.

Advertising design and the sale of advertising time and space was the service that generated the most export revenue in the culture and mass media branches in 2002.

Exports of services by businesses in the culture and mass media branches 2000-2002

TOL code	Branch	2000	2001	2002
MASS MEDIA BRANCHES		EUR million		
22120	Newspaper publishing	4,8	4,5	4,4
22130	Magazine publishing	6,9	4,3	5,2
22150	Other publishing	0,3	0,2	0,3
92200	Radio and TV	0,2	2,4	4,5
92400	News agencies	0,4	0,5	0,5
51474	Book wholesalers	0,1	0,1	0,1
22140	Sound recording publishing	0,6	0,6	0,6
92110	Film and video production	1,0	0,9	0,6
92120	Film distribution, video wholesale	0,9	0,9	0,8
TOTAL		15,2	14,4	17,0
CULTURE BRANCHES				
92312	Theatre and concerts	0,0	2,2	1,1
74203	Architectural services	3,9	2,8	3,1
74401	Advertising agencies	27,0	24,6	28,7
74402	Direct and outdoor advertising	0,1	0,1	0,1
TOTAL		31,0	29,7	33,0
CULTURE AND MASS MEDIA TOTAL		46,2	44,1	50,0

Source: Statistics Finland, survey of foreign trade in services

Survey of foreign trade in services

The purpose of the survey is to gather information on how businesses in Finland sell services abroad and buy services from abroad. This information is used to compile statistics on balance of payments and the accounting of the national economy. The survey is conducted by the Business Structures Unit of Statistics Finland.

In the survey, costs/revenue indicates a business in Finland either paying a foreign party for services or being paid by a foreign party for services. The actual production of the service may occur in Finland or abroad. The information is gathered by category of service. There are 20 of these categories in all, of which the ones most relevant to culture and mass media businesses are advertising, market research and polls, royalties and licence fees, audiovisual and related services, and other personal, culture and leisure services.

The survey can be either an overall study or a random-sample study. The overall study approach involves all companies that had indicated in the previous study that they engage in foreign trade of services, that they are foreign-owned, that they owned foreign subsidiaries, or that they employed at least 80 people. The overall study in the survey for 2002 involved 1,887 businesses. Other businesses are surveyed using a random sample.

The target group is formed by excluding the following from the business population:

- Industrial businesses employing fewer than 10 people or having a turnover of less than EUR 10 million;
- Service businesses employing fewer than 5 people or having a turnover of less than EUR 1.5 million;
- Businesses in branches that probably do not engage in foreign trade in services or whose exports of services are recorded elsewhere, for instance under travel services. The excluded branches mainly involve primary production;
- Finally, businesses that had indicated in the previous study that they do not engage in foreign trade in services.

Stratified random sampling was employed to select 809 businesses from the target group.

Thus, the survey for 2002 was sent to a total of 2,696 businesses. The response rate was 93%; this high figure was due to the statutory nature of the survey.

Of the respondent businesses, 35% indicated that they had not engaged in foreign trade in services. In the overall study framework, the corresponding figure was 22%.

In processing the data, the sample data are extrapolated using an increase estimator (?) to cover the entire study domain. In the survey for 2002, new values were imputed for those businesses that had indicated in the previous survey that they engaged in foreign trade in services but did not respond to this survey. This was done by calculating changes in volume by service type between 2001 and 2002 and multiplying the business's figures for the previous year with that coefficient. For other businesses in the sample that did not respond, import and export data were imputed by using the ratio between personnel and export volume in each branch as the increase coefficient. Then, the overall values for imports and exports in each branch were calculated. These were divided by service type and by country, using the ratios received from the responses of businesses in the overall study as increase coefficients. The overall study itself was considered to have an increase coefficient of 1. The result is a statistical overview of foreign trade in services by service type and by country. The data can also be analysed by branch.

Further information on the survey of foreign trade in services can be found in the publication *Yritysten kansainvälistyminen. Tilastokeskus, Yritykset 2003:5* and the Statistics Finland website, www.tilastokeskus.fi/tk/yr/rake_ta91koti.html.

The survey of foreign trade in services from the point of view of culture and mass media

When using the survey of foreign trade in services for examining culture and mass media exports, we must remember that the survey only covers exports and imports of services, which only accounts for part of Finland's foreign trade as a whole. Statistics on the import and export of goods are compiled by the National Board of Customs. It is most probable that culture and mass media exports consist largely of service exports, for example selling design and production services and the performance rights of TV programmes, films and recordings. In view of this, the survey is well suited as a source of statistics for culture and mass media exports. Several branches in culture and the mass media also export goods. The percentage of services in culture and mass media exports depends on how culture and the mass media are defined.

With this survey, we must also remember that it focuses on the foreign trade of businesses. In culture and the mass media, businesses account for only a part of the exports. Cultural institutions export services a lot, and individuals such as artists also generate revenue from abroad.

In the survey of foreign trade in services, the service categories related to culture and mass media also include other services. For example, the category of royalties and licence fees includes revenue on products and services not related to culture or the mass media. The category of other personal, culture and leisure services also includes education and health care. Advertising is lumped in with market research. Only audiovisual services are almost exclusively culture-related. Thus, it is not possible to describe culture and mass media service exports satisfactorily through service category data alone; instead, we must extract culture and mass media businesses from the data and examine their export revenue. The table shown above was created in this manner, including branches related to the mass media, various genres of art, advertising and design. The branches were selected with broad criteria; several of the branches selected had no service export revenue at all.

It is typical for many branches in culture and the mass media to have a small number of very large businesses and a large number of small businesses, as in certain mass media branches (newspaper publishing, magazine publishing, radio and TV). In these branches, it is probable that most of the companies engaging in export belong to the overall study component of the survey of foreign trade in services due to their size alone. The inclusion of small companies in the survey relies on random sampling. This probably has the greatest impact in the branches that consist solely of small companies (e.g. film production).

The service type distribution in exports in culture and mass media branches is very logical in almost all cases. The study shows that export revenue derives from sales of services that are central to each particular branch. In certain branches, such as radio and TV, the results were somewhat surprising.

Assessment of the results of the survey on foreign trade in services as regards culture and the mass media is hampered by a lack of reliable comparable data. Actual comparable data is only available for exports in the recording and music branch and for advertising. Assessments made by experts in various fields can also be used. In a cursory assessment, export revenue was found to be minor in comparison with other sources of income only in the branches of advertising and recording publishing. Even here, the difference is probably due to variation in the definition of services or the description of branches.

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