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## “Capacity Building for the Proper Transformation of the Creative Economy in Türkiye Project”



# Creative Economy Sector Report

Ankara, 2025







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## Executive Summary

The Periodic Creative Economy Sector Report is designed to serve as a comprehensive resource for understanding and advancing Türkiye's creative economy. Targeted primarily at policymakers, government officials, creative economy actors, industry stakeholders, and academics, the report also aims to inform and inspire secondary audiences, including the general public and media, by providing accessible and actionable insights.

The creative economy is increasingly recognized as a vital driver of innovation, cultural exchange, and economic growth worldwide. It encompasses a wide range of sectors, from arts and design to CreaTech and media, making it a dynamic force in both local and global economies. For Türkiye, this sector holds significant potential to boost employment, enhance cultural influence, and foster technological advancement, while also contributing to sustainable development and social cohesion.

This report aims to raise awareness about the creative economy by highlighting its significance and impact on Türkiye's socio-economic landscape, emphasizing its role in driving innovation and fostering cultural exchange. It is designed to guide policy development, supporting evidence-based decision-making and encouraging strategic planning that aligns with global creative economy trends. Additionally, the report provides sector-specific insights, offering a detailed analysis of trends, challenges, and opportunities across the creative economy's diverse sectors. Finally, it seeks to support research by serving as a reliable, data-driven reference for academics and researchers exploring the dynamics of the creative economy.

By addressing these objectives, the report aims to position Türkiye's creative economy within a broader global framework, identifying its strengths, opportunities, and areas for growth. Through its biannual updates, the report will ensure ongoing relevance and utility, fostering informed discussions and strategies for the sector's sustainable development.



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## Limitations and challenges

While preparing this Periodic Report, several challenges were encountered that reflect the complex and evolving nature of the creative economy. One of the key difficulties is the availability and consistency of data. Although considerable progress has been made in collecting data on certain sectors, there is still a lack of comprehensive, up-to-date national datasets. This often requires reliance on international sources, which, while valuable, may not fully capture the unique dynamics of Türkiye's creative economy.

Another challenge is the diverse definitions and methodologies used in measuring the creative economy. The absence of standardized definitions for terms such as "creative economy" and "cultural industries" can create inconsistencies in data and complicate comparisons. In this regard, a broad and comprehensive perspective covering the diverse structure and many sub-fields of the sector has been tried to be adopted, and the need for flexibility in these definitions has been accepted. This holistic approach aims to ensure that every sector's potential is acknowledged, contributing to a more comprehensive understanding of the creative economy as a whole.



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## Conceptualisation and Definition

The classification of creative industries varies across international and regional frameworks, reflecting different methodologies and policy priorities. Economic activity-based classifications, occupational role categorizations, and creative intensity models are among the most widely used approaches. While some frameworks emphasize cultural production and heritage, others focus on innovation-driven industries and their economic impact.

When presenting data from multiple sources, existing classifications are followed to maintain consistency with the original datasets. This may result in variations between different classification systems, but it ensures the most comprehensive and comparable data representation. Rather than indicating a methodological inconsistency, this approach reflects the necessity of aligning with diverse yet internationally recognized categorizations to capture a holistic view of the creative economy.

By integrating multiple classification systems, a broader perspective on creative industries emerges, allowing for a more nuanced understanding of their economic and cultural contributions.

UNESCO, UNCTAD, and Eurostat provide widely used frameworks for categorizing creative industries, each shaped by institutional priorities. UNESCO's classification emphasizes cultural heritage, artistic creation, and media sectors, while UNCTAD integrates creative services and digital industries, highlighting their economic role in global trade. Eurostat's statistical framework, developed through ESSnet-Culture, aligns with EU policies, structuring cultural and creative industries based on economic functions and employment data.

National models also influence classification debates. The UK's long-established approach, initially developed through policy-driven mapping, introduced the concept of *creative intensity* to measure the proportion of creative roles within industries. This methodology has been widely adopted but differs from broader frameworks that prioritize cultural policy objectives over economic impact.

These variations illustrate how creative industries are defined through different lenses, from cultural value to economic contribution. While no single model captures the sector's full complexity, using multiple frameworks enhances the ability to compare trends and measure the evolving nature of creative economies.



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<b>DCMS Classification<sup>1</sup></b>	<b>Classification of Creative Industries by UNCTAD/UNESCO<sup>2</sup></b>
<ul style="list-style-type: none"><li>• Advertising and Marketing</li><li>• Architecture</li><li>• Crafts</li><li>• Design: Product, Graphic ve Fashion</li><li>• Film, TV, Video, Radio and Photography</li><li>• Information Technologies, Software and Computer Services</li><li>• Publishing</li><li>• Museums, Galleries and Libraries</li><li>• Music, Performing and Visual Arts</li></ul>	<p><b>Cultural Heritage</b></p> <ul style="list-style-type: none"><li>• <b>Traditional Cultural Products:</b> Arts and crafts, festivals, celebrations</li><li>• <b>Cultural Spaces:</b> Archaeological sites, museums, libraries, exhibitions, etc.</li></ul> <p><b>Arts</b></p> <ul style="list-style-type: none"><li>• <b>Visual Arts:</b> Painting, sculpting, antiques photography</li><li>• <b>Stage Arts:</b> Live music, theatre, dance, opera, circus, puppetry, etc.</li></ul> <p><b>Media</b></p> <ul style="list-style-type: none"><li>• <b>Publishing and Printed Media:</b> Books, media, and other publications</li><li>• <b>Audiovisual Media:</b> Cinema, television, radio, etc.</li><li>• <b>New Media:</b> Software, video games, and digitalized creative content</li></ul> <p><b>Functional Creativity</b></p> <ul style="list-style-type: none"><li>• <b>Design:</b> Interior design, graphic design, fashion, jewellery, and toy design</li><li>• <b>Creative Services:</b> Architecture, advertising, culture and recreation services, creative R&amp;D</li></ul>

<sup>1</sup> İzmir Development Agency. (2021). *Analysis of the Creative Industries in Turkey at NUTS-2 Regions Level: Focus on İzmir*. İzmir Development Agency.

<sup>2</sup> İzmir Development Agency. (2021). *Analysis of the Creative Industries in Turkey at NUTS-2 Regions Level: Focus on İzmir*. İzmir Development Agency.



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# Global Trends

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Measuring global trends in the creative economy presents significant challenges due to the lack of standardized definitions and methodologies. Variations in how terms such as "culture," "cultural and creative industries," and "creative economy" are understood and applied lead to inconsistencies in data. Additionally, differences in what is measured—whether it is contribution to GDP, value added, or another metric—complicate efforts to make meaningful comparisons. Discrepancies in reference years further limit the comparability of data across countries and regions. Despite these challenges, analyzing available data provides valuable insights into the growing significance of the creative economy worldwide.



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### A SNAPSHOT OF GLOBAL CREATIVE ECONOMY<sup>3</sup>

GROWTH AND ECONOMIC IMPACT	DIGITAL TRANSFORMATION	YOUNG CONSUMERS AND DIGITAL CONTENT	GLOBAL EMPLOYMENT TRENDS	ECONOMIC CONTRIBUTIONS OF CREATIVE SECTORS	NATIONAL POLICIES
The creative economy is rapidly growing, contributing <b>\$2.3 trillion annually</b> , accounting for 3.1% of global GDP. It generates both cultural and economic value, supporting job creation and economic development.	<b>Digital content is increasingly replacing physical goods</b> in sectors like books, films, music, and video games, driven by streaming and digital platforms. This shift supports new business models and fosters cross-industry collaborations (e.g., between video games, music, publishing, and film).	Demographic changes in developing economies, particularly <b>younger generations, are fueling the demand for digital content</b> , which is driving growth in creative industries.	The cultural and creative industries contribute <b>6.2% to global employment</b> , though this varies significantly across countries, from <b>1% in Türkiye</b> to 2.1% in Australia.	The creative economy's contribution to GDP varies greatly by country, ranging from <b>0.5% to 7.3%</b> , with developing economies seeing notable contributions, though data disparities complicate comparisons.	<b>Over 70% of countries</b> have implemented national plans or strategies to support and develop the creative economy, often through dedicated ministries or agencies.

### A SNAPSHOT OF GLOBAL CREATIVE ECONOMY<sup>4</sup>



#### Trends in Global Advertising

The global advertising industry, valued at \$806 billion in 2023, is increasingly driven by digital platforms, with a shift towards video game advertising, expected to grow from \$70 billion in 2022 to \$137 billion by 2027.

<sup>4</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.



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### Growth in Digital Royalties

Digital royalties have surpassed traditional sources, with subscription streaming contributing 35% to global royalty collections in 2022. Latin America leads in the fastest-growing region for digital royalty collection.



### Video Games and Turkish Esports Federation

The video game industry, expected to generate \$314 billion by 2027, outpaces traditional entertainment sectors like film and music. Esports is rapidly growing, with ticket sales doubling in recent years.



### Music Industry Evolution

The global recorded music industry hit a record \$28.6 billion in 2023, with streaming accounting for more than two-thirds of total revenue. Developing regions like Sub-Saharan Africa saw significant growth.



### Global Film Production

In 2022, a record 8,748 films were produced globally, with India leading as the top producer. Developing countries such as Argentina, Brazil, and Türkiye are key players in global film



### Visual Arts Market Trends

Despite market volatility, the visual arts sector remains strong, with global sales in 2023 totaling \$65 billion. Digital platforms and celebrity engagement are driving investment interest in the art market.



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## EMERGING MARKETS AND SECTORS

- India held **the top film producer position** in 2023, contributing 29% of the global volume, while other developing economies, including Türkiye, Argentina, Brazil, China, the Islamic Republic of Iran, Mexico, the Philippines, and the Russian Federation, were among the top 20 film-producing economies in the world.<sup>5</sup>
- Developing economies like Türkiye are expected to experience the fastest growth in the video game sector, with an average annual increase of **24.1% between 2021 and 2026**, followed by Pakistan at 21.9% and India at 18.3%<sup>6</sup>.
- UNCTAD estimates that the total exports of creative services<sup>7</sup> reached a record US\$ 1.4 trillion in 2022 (marking a 29% increase since 2017), almost double of creative goods exports, which reached US\$ 713 billion.<sup>8</sup>
- While developed countries continue to lead in creative services exports, developing countries primarily focus on creative goods. Notably, developing countries have doubled their share of creative services exports, rising from **10% in 2010 to 20% in 2022**.<sup>9</sup>
- Global recorded music revenues from streaming have grown exponentially since 1999, rising from just **\$0.1 billion to \$19.3 billion** by 2023. This remarkable growth highlights the transformative role of streaming services in the music industry, driven by technological advancements and shifting consumer behaviors.<sup>10</sup>
- AI is widely adopted in newsrooms, with **41%** using it for illustrative art, **39%** for social media content, and **38%** for article generation. Digital tools also pose challenges in terms of quality control, copyright issues, and market monopolisation in the lack of strong regulations.

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### Top Exported Creative Services in 2022

1. **Software Services:** 41.3%
2. **Research & Development:** 30.7%
3. **Advertising, Market Research, and Architecture:** 15.5%
4. **Audiovisual Services:** 7.9%
5. **Information Services:** 4.0%
6. **Cultural, Recreational, and Heritage Services:** 0.6%



<sup>5</sup> World Intellectual Property Organization (2024). Resurgence of Global Cinema: 2022 and 2023 witness forceful comeback but still shy of pre-pandemic norms.

<sup>6</sup> PwC (2022). Perspectives from the Global Entertainment & Media Outlook 2022–2026.

<sup>7</sup> The six services groups include advertising, market research, and architecture, audiovisual, cultural, recreational, and heritage services, information, research and development, software.

<sup>8</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.

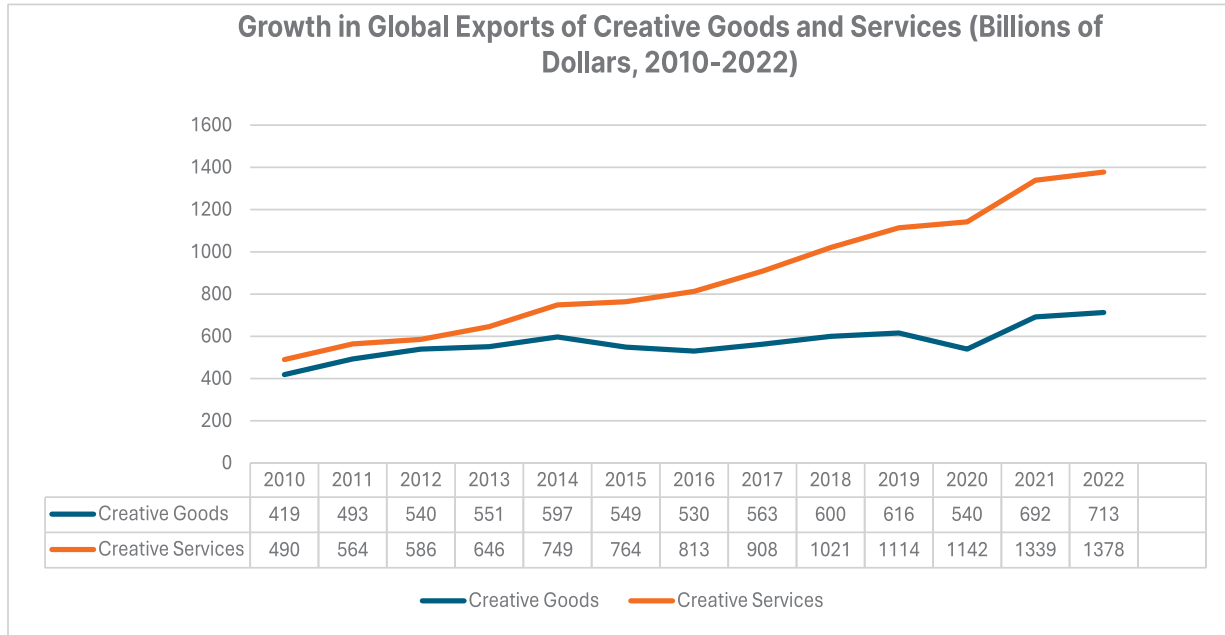
<sup>9</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.

<sup>10</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.

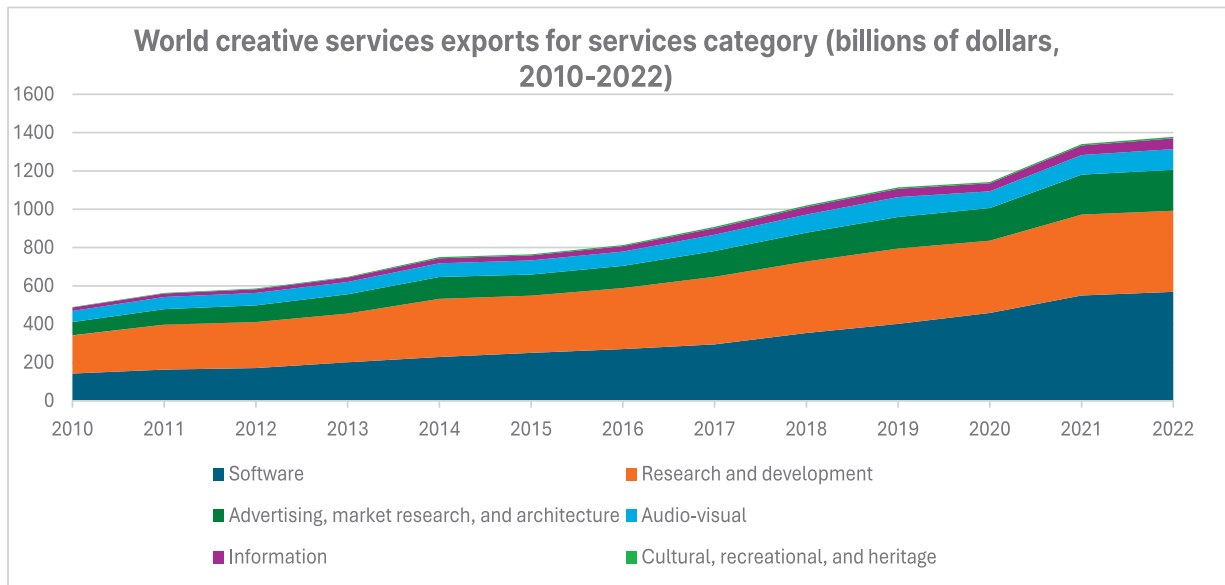


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### Growth in Global Exports of Creative Goods and Services (2010-2022)<sup>11</sup>



### World creative services exports for services category (billions of dollars, 2010-2022)<sup>12</sup>



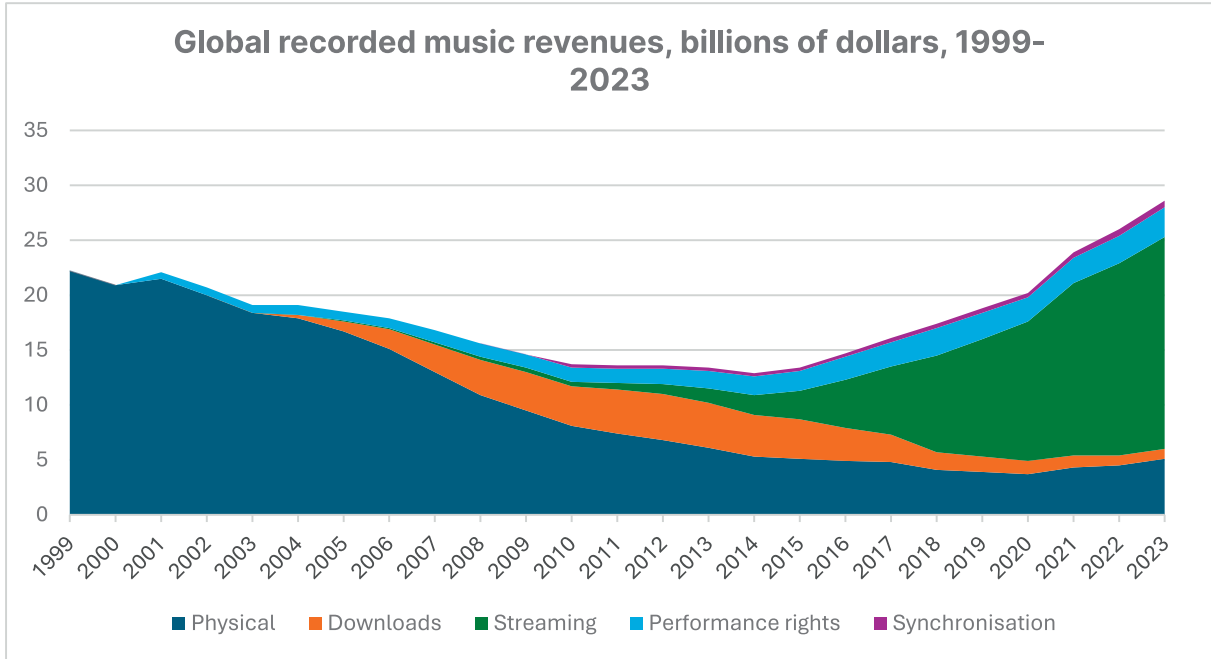
<sup>11</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.

<sup>12</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.



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### Global recorded music revenues, billions of dollars, 1999-2023<sup>13</sup>



<sup>13</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.



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In 2022, the top exporters of creative services among developing economies reflected the dominance of Asia and the Middle East. While China and Hong Kong (China) maintained their leadership, Türkiye stood out as a key player, securing its place in the top five and reinforcing its growing prominence in the global creative economy.

While UNESCO estimates that **CCIs** account for **6.2% of global employment**, the International Labour Organization narrows this figure to **1.4%** when focusing solely on **the arts and entertainment sector**. This highlights the diverse scope and definitions applied to creative economy measurements.

The global creative and cultural industries generate approximately **\$2.3 trillion in annual revenue**, accounting for **3.1% of the world's total GDP**.<sup>14</sup>

#### Developing economies: Top five creative services exporters in 2022<sup>15</sup>

1. China
2. Hong Kong (China)
3. India
4. United Arab Emirates
5. **Türkiye**



<sup>14</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.

<sup>15</sup> United Nations Conference on Trade and Development, *Creative Economy Outlook 2024*. United Nations, 2024. Retrieved from <https://unctad.org/publication/creative-economy-outlook-2024>.



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Reflecting this growing prominence of developing economies in the global creative economy, Türkiye's inclusion among the top exporters of creative services in 2022 emphasizes its increasing role. This shift in global dynamics is paralleled by rapid transformations within the entertainment and media industry, which are being shaped by technological advancements, evolving consumer behaviors, and the rise of digital platforms. These shifts are reshaping traditional business models and creating new opportunities across the sector. As one of the most dynamic components of the creative economy, the industry not only reflects global economic trends but also plays a pivotal role in shaping cultural consumption and innovation worldwide.

Looking ahead, certain trends and forecasts demand close attention. Generative AI is becoming a significant disruptor in content creation and distribution, offering new possibilities for efficiency and innovation. Meanwhile, the global advertising market is set to reach nearly \$1 trillion, with digital platforms driving this growth. Additionally, the video games and esports sector is expected to generate over \$314 billion in revenue by 2027, highlighting its growing influence within the industry. The ongoing shift to digital consumption continues to reshape audience behaviors, with traditional media formats facing increasing pressure to adapt.<sup>16</sup>

<sup>16</sup> PwC. (2024). *Global Entertainment & Media Outlook 2024–2028*. Retrieved from <https://www.pwc.com/gx/en/newsroom/press-releases/2024/pwc-global-entertainment-and-media-outlook-2024-28.html>.



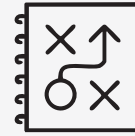
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## Where to Look for Growth<sup>17</sup>



**Global creative industries grew by 5% in 2023**, reaching \$2.8 trillion. Revenue is expected to exceed **\$3.4 trillion by 2028** (3.9% annual growth).

**Generative AI is transforming the industry**, boosting efficiency and enabling new business models. However, **57% of leaders believe their strategies must evolve within the next decade.**



**Advertising** continues to lead, with revenues surpassing **\$1 trillion by 2026**, outpacing consumer spending.

**The video games and esports sector** is expected to generate over **\$314 billion in revenue by 2027.**



<sup>17</sup> PwC. (2024). *Global Entertainment & Media Outlook 2024–2028*. Retrieved from <https://www.pwc.com/gx/en/newsroom/press-releases/2024/pwc-global-entertainment-and-media-outlook-2024-28.html>



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# Türkiye's Creative Landscape

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# 1. Innovation Insights: Türkiye

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*This section explores Türkiye's innovation performance, highlighting its position in global rankings, creative outputs, and science & technology clusters. By showcasing Türkiye's strengths in innovation and intellectual property, this part underscores the country's creative potential and growing influence in the global innovation landscape.*

## Innovation Economy

- According to the **Global Innovation Index 2024 (GII)**<sup>18</sup>, the top three innovation economies in the Northern Africa and Western Asia region are:<sup>19</sup> (excluding island economies) **Israel, United Arab Emirates, and Türkiye.**
- Türkiye ranks **37th among 133 countries.**<sup>20</sup> In the Northern Africa and Western Asia region, Israel (15th) leads the region, followed by the United Arab Emirates (32nd), and Turkey (37th).<sup>21</sup>

### Top innovation economies in the region

1. Israel
2. United Arab Emirates
3. Türkiye



Türkiye's global rank: **37th**

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**Türkiye**, along with China, India, Vietnam, the Philippines, Indonesia, the Islamic Republic of Iran, and Morocco are middle-income economies that have seen **the fastest improvements in GI** rankings since 2013.<sup>22</sup>

- **Türkiye holds the 3rd position** among upper middle-income countries in innovation performance.<sup>23</sup>

<sup>18</sup> World Intellectual Property Organization (WIPO). (2024). *Global innovation index 2024: Measuring innovation around the world*. Retrieved from [https://www.wipo.int/web-publications/global-innovation-index-2024/assets/67729/2000%20Global%20Innovation%20Index%202024\\_WEB3lite.pdf](https://www.wipo.int/web-publications/global-innovation-index-2024/assets/67729/2000%20Global%20Innovation%20Index%202024_WEB3lite.pdf)

<sup>19</sup> WIPO, *Global Innovation Index 2024*, p.17.

<sup>20</sup> WIPO, *Global Innovation Index 2024*, p. 17.

<sup>21</sup> WIPO, *Global Innovation Index 2024*, p. 22.

<sup>22</sup> WIPO, *Global Innovation Index 2024*, p. 21.

<sup>23</sup> WIPO, *Global Innovation Index 2024*, p. 23.



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- While international patent filings under the Patent Cooperation Treaty declined by approximately 2% in 2023, **Türkiye achieved a notable increase of 8.5% in patent filings.**<sup>24</sup>
- Türkiye is one of only four middle-income economies, aside from China, to rank among the top 40 this year, placing 37th overall. Türkiye has made significant progress compared to previous years, securing the 3rd position among upper middle-income economies and outperforming Bulgaria.
- Middle-income economies like China and Türkiye outperform several high-income countries in innovation outputs. Türkiye, ranked 37th, delivers higher outputs than high-income economies such as Iceland (22nd) and Australia (23rd), despite operating with lower input levels.<sup>25</sup>

**Table 1: Top 10 Economies by income group**<sup>26</sup>

Income group Rank	Global Innovation Index Rank	Upper-middle income economies
1	11	China
2	33	Malaysia
3	37	<b>Türkiye</b>
4	38	Bulgaria
5	41	Thailand
6	50	Brazil
7	52	Serbia
8	54	Indonesia
9	55	Mauritius
10	56	Mexico

### Creative Output

- While innovation leaders (the top 25) exhibit balanced and strong performance across all innovation fields, some lower-ranked economies excel in specific areas. **Türkiye stands out in creative outputs**, ranking 16th among 133 countries in this category.<sup>27</sup>

<sup>24</sup> WIPO, *Global Innovation Index 2024*, p. 38.

<sup>25</sup> WIPO, *Global Innovation Index 2024*, p. 62.

<sup>26</sup> WIPO, *Global Innovation Index 2024*, p. 58.

<sup>27</sup> WIPO, *Global Innovation Index 2024*, p. 62.



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- **Türkiye** stands out, especially in the area of Intangible assets (4th), where it ranks 1st globally in Trademarks and Industrial designs. This means that Türkiye holds a leading position globally in creating and protecting intangible assets like trademarks and industrial designs. It highlights Türkiye's strong performance in innovation and intellectual property.<sup>28</sup>

### Ranking of Türkiye in Creative Outputs

- 🏆 Trademarks & Industrial Designs: 1
- ✳️ Intangible Assets: 4
- 🖌️ Creative Outputs: 16

## Science & Technology Clusters

- Among middle-income economies, excluding China, significant growth in Science & Technology outputs was observed. **Istanbul (Türkiye) stood out with a growth rate of 7.5%**, following Cairo (Egypt) at 10.9% and Chennai (India) at 7.8%, highlighting Türkiye's advancing position in this field.<sup>29</sup>

<sup>28</sup> WIPO, *Global Innovation Index 2024*, p. 67.

<sup>29</sup> WIPO, *Global Innovation Index 2024*, p. 74



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## Social Entrepreneurship

### Social Innovation & Creative Economy

Social entrepreneurship is deeply intertwined with the creative economy, as both thrive on innovation, resourcefulness, and the ability to address complex societal challenges. In Türkiye, social enterprises contribute to the creative economy by developing unique solutions that combine cultural, social, and economic value. These initiatives not only drive local impact but also foster global competitiveness in key areas such as intellectual property, design, and community-driven innovation. Highlighting the role of social entrepreneurship within the creative economy emphasizes the need for supportive ecosystems that can unleash its full potential.

- In Türkiye, over **66% of social enterprises** rely on self-financing through family, friends, and personal savings as their primary funding source.<sup>30</sup> While this highlights the resourcefulness and determination of social entrepreneurs, it also points to a **gap in access to structured funding mechanisms** and institutional support.
- In contrast, in the European Union, self-financing is far less common, with only **40%** of social enterprises using personal savings and just **16%** turning to family and friends.<sup>31</sup> The UK stands out further, with less than **10%** relying on self-financing due to the presence of a **strong ecosystem of governmental, philanthropic, and impact investing initiatives**.<sup>32</sup>
- Türkiye's reliance on self-financing underscores the **need for more structured funding mechanisms and ecosystem support** to enable social enterprises to scale their impact sustainably.

<sup>30</sup> British Council, & Social Enterprise UK, *More in common: The global state of social enterprise*, 2022. Retrieved from [https://www.britishcouncil.org/sites/default/files/more\\_in\\_common\\_global\\_state\\_of\\_social\\_enterprise.pdf](https://www.britishcouncil.org/sites/default/files/more_in_common_global_state_of_social_enterprise.pdf).

<sup>31</sup> Dupain, W., Scharpe, K., Gazeley, T., Bennett, T., Mair, J., Raith, M., & Bosma, N., *The state of social enterprise in Europe – European Social Enterprise Monitor 2021-2022*, Euclid Network, 2022. Retrieved from <https://knowledgecentre.euclidnetwork.eu/download/european-social-enterprise-monitor-2021-2022/>.

<sup>32</sup> Social Enterprise UK, *Mission critical – State of social enterprise survey 2023*, 2023. Retrieved from <https://www.socialenterprise.org.uk/seuk-report/mission-critical-state-of-social-enterprise-survey-2023/>.



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## 2. Cultural Economy and Employment

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*In this section Türkiye's cultural economy is examined through key indicators such as cultural employment, public spending, and international trade in cultural goods. This section highlights the economic and societal contributions of the cultural sector, emphasizing its role in building a sustainable and inclusive creative economy.*

### Cultural Economy<sup>33</sup>

- In Türkiye, **cultural expenditures in 2023 increased by 84.7%** compared to 2022, reaching **276 billion 338 million 253 thousand Turkish Lira**. The share of cultural expenditures in the Gross Domestic Product (GDP) was 1.0% in 2023.

#### Cultural Expenditures in Türkiye Soared

**84.7%** Growth in 2023

Reaching **276.3 Billion TL**

- In 2023, **general government spending** accounted for **64.3%** of Türkiye's total cultural expenditures. These expenditures saw a **98.1% increase** compared to the previous year, reaching **177.6 billion TL**. Among the various areas of cultural spending, the **largest share (24.4%)** was allocated to **architecture**, reflecting significant investments in areas such as **urban design, restoration, and cultural heritage projects**.
- **In 2023**, Türkiye's cultural expenditures **were primarily funded by the central government with a share of 43.6%**, followed by local government at 20.6%, while **household expenditures accounted for 34.8%**, highlighting a significant contribution from both public and private sources.
- **Cultural goods exports** increased by **47.7%** compared to the previous year, reaching **263 billion 740 million 463 thousand TL**, while **cultural goods imports rose by 87.5%**, reaching 149 billion 553 million 210 thousand TL. The share of cultural goods exports in total goods exports was 4.3% in 2023, while the share of cultural goods imports in total goods imports was 1.8%.

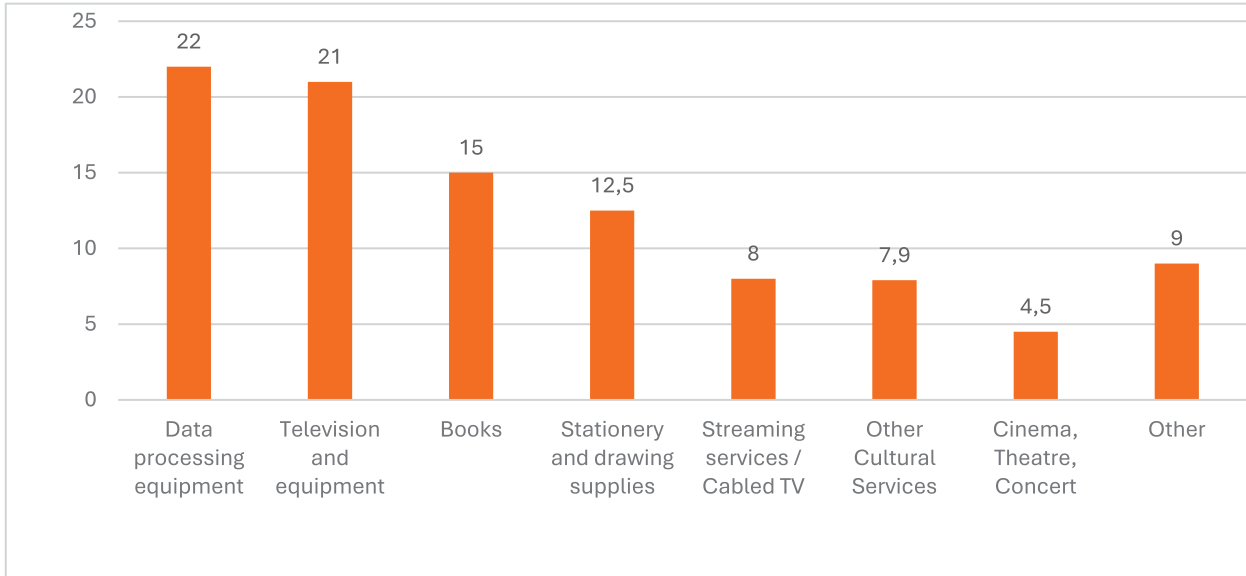
<sup>33</sup> Turkish Statistical Institute (TÜİK), *Cultural economy and cultural employment statistics 2023*. Retrieved from <https://data.tuik.gov.tr/Bulten/Index?p=Kultur-Ekonomisi-ve-Kulturel-Istihdam-Istatistikleri-2023-53653>.



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## Household cultural expenditures by expenditure type 2023 (%)

Source: TURKSTAT



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### Cultural Goods: Export Strength, Import Challenge



7% (263.7 billion TL)

**Imports: +87.5%** (149.6 billion TL)

**Export Share in Total Trade: 4.3%**

**Import Share: 1.8%**

*While Türkiye's cultural exports show strong momentum, the sharp rise in imports highlights the need for strategic policies to support domestic production and sustain this growth.*



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- Türkiye ranked among the **top five developing countries in publishing industry revenue** in 2022, with a total revenue of **\$638 million**.<sup>34</sup>
- Türkiye was also among the **top ten countries with the highest number of ISBN registrations**, recording **83,653 registrations in 2022**.<sup>35</sup>

### International Trade in Cultural Goods<sup>36</sup>

- In 2023, the European Union (EU)'s total exports of cultural goods amounted to €26,012.0 million, while imports totaled €24,696.6 million. In **Türkiye**, exports of cultural goods reached **€8,426.0 million**, and imports stood at **€2,546.1 million**.
- In Türkiye's trade with the EU, **jewellery stands out as a significant export category**. It accounted for **73.6%** of the total value of cultural goods imported by the EU from Türkiye, underscoring its prominence in the cultural goods trade between Türkiye and its European trade partners.
- In 2023, exports of cultural goods accounted for approximately 1% of total exports in the EU, while in **Türkiye**, this share was about 4%.
- In 2023, the majority of Türkiye's cultural goods exports were dominated by **jewellery**, which accounted for **92.1%** of the total. Other product categories made up much smaller shares: **crafts at 6.4%**, **books at 1.0%**, and **works of art, recorded media, and musical instruments** each contributing **0.2%** or less.
- In 2023, the majority of Turkey's cultural goods imports were also dominated by **jewellery**, which accounted for **87.7%** of the total. Other product categories made up much smaller shares: **crafts at 5.0%**, **books at 2.1%**, **musical instruments at 1.9%**, **works of art at 1.2%**, **video game consoles at 1.1%**, **recorded media at 0.7%**, **antiques at 0.1%**, and other items at 0.1%.

<sup>34</sup> UNCTAD, based on World Intellectual Property Organization (2023). Note: a) trade sector only b) print format only. World Intellectual Property Organization (2023). The Global Publishing Industry in 2022. World Intellectual Property Organization. Geneva.

<sup>35</sup> UNCTAD, based on World Intellectual Property Organization (2023). World Intellectual Property Organization (2023). The Global Publishing Industry in 2022. World Intellectual Property Organization. Geneva.

<sup>36</sup> Eurostat, *Culture statistics - international trade in cultural goods*, European Commission, July 2024. Retrieved from [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture\\_statistics\\_-\\_international\\_trade\\_in\\_cultural\\_goods](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_international_trade_in_cultural_goods).



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- In 2023, **Türkiye** ranked **7th** among the main partners for extra-EU exports of cultural goods, accounting for approximately 5% of the total. (Top three being Switzerland, US, UK)
- In 2023, **Türkiye** ranked **8th** among the main partners for extra-EU imports of cultural goods, accounting for approximately 4% of the total. (Top three being China, Switzerland US)
- According to UNESCO data<sup>37</sup>, **Türkiye's per capita public expenditure on cultural and natural heritage** in 2019, 2020, and 2021, adjusted for constant purchasing power parity \$, was recorded as 17.6, 13.6, and 7.7 respectively. This shows a decrease over the years, with a significant drop in 2020 and 2021, indicating a reduction in Türkiye's public spending on cultural and natural heritage, considering inflation and price differences across years.
- Additionally, **Türkiye's total per capita public expenditure at the local/municipal level on cultural and natural heritage** in the same years was 6.5, 4.2, and 3.1 respectively, further reflecting a decline in spending at the local level as well.

### Cultural Employment in 2023<sup>38</sup>

- According to OECD data, the share of cultural and creative jobs in Türkiye stands at 1%, compared to 2.1% in Australia, among G20 economies.<sup>39</sup>
- According to TURKSTAT data, in 2023, cultural employment was largely composed of individuals working in cultural professions, which made up 89.3%, while 10.7% were employed in non-cultural professions. Within cultural employment, 38.5% were artisans, 18.7% were architects, planners, and designers, 9.9% were creative artists and performing artists, and 9.3% were writers, journalists, and linguists.
- In terms of cultural activity sectors, the share of those working in architecture and specialized design activities within total cultural employment was 11.1%, while those working in creative arts, performing arts, and entertainment activities accounted for 5.6%. Additionally, 4.3% of cultural employment was in programming, publishing, and news agency activities.

<sup>37</sup> United Nations Educational, Scientific and Cultural Organization (UNESCO), *UIS Statistics*. Retrieved from <https://data.uis.unesco.org/>.

<sup>38</sup> Turkish Statistical Institute (TÜİK), *Cultural economy and cultural employment statistics 2023*. Retrieved from <https://data.tuik.gov.tr/Bulten/Index?p=Kultur-Ekonomisi-ve-Kulturel-Istihdam-Istatistikleri-2023-53653>.

<sup>39</sup> OECD (2021). Economic and social impact of cultural and creative sectors.



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### Comparing Cultural Employment: EU vs. Türkiye in 2023<sup>40</sup>

*This comparison highlights key differences and similarities in cultural employment trends between the EU and Türkiye, providing insights into workforce dynamics, sectoral priorities, and potential areas for policy alignment or improvement.*

- **In 2023**, there were 7.8 million people employed in the cultural sector across the EU, **representing 3.8% of total employment**. Cultural employment in the EU grew by 0.4% compared to the previous year. Cultural employment varied significantly across EU countries, with Romania having the lowest at 1.5%, and the Netherlands at the highest with 5.3%. While in **Türkiye**, cultural employment represented **3.0% of total employment**.
- 2023 also saw **the smallest gender gap in cultural employment**, with 3.93 million men and 3.85 million women working in the sector.
- In the **EU**, **31.7%** of cultural sector workers are self-employed, significantly higher than the **13.8%** in total employment across all sectors. In **Türkiye**, **36.8%** of cultural sector workers are self-employed, which is notably higher than the **20.8%** in total employment. This indicates that the proportion of self-employed individuals in the cultural sector in Türkiye is higher than in the EU, suggesting that the culture sector in Türkiye has a more widespread culture of independent work.
- In the **EU**, **75.8%** of cultural sector workers are employed full-time, compared to **81.2%** in total employment across all sectors. In **Türkiye**, **76.9%** of cultural sector workers are employed full-time, while the rate for total employment is higher at **89.8%**.
- In the **EU**, **93.9%** of cultural sector workers have only one job, compared to **96.1%** in total employment across all sectors. In Türkiye, **96.5%** of cultural sector workers have only one job, slightly lower than the **97%** in total employment.
- In 2023, the number of persons working as creative and performing artists, authors, journalists, and linguists was **1,722 thousand** in the **EU** and **142 thousand** in **Türkiye**.
- In the **EU**, **81.8%** of cultural sector workers have permanent jobs, compared to **86.5%** in total employment across all sectors. In **Türkiye**, **92.9%** of cultural sector workers have permanent jobs, which is notably higher than the **89.0%** in total employment.

<sup>40</sup> Eurostat, *Culture statistics - cultural employment* (2023). Retrieved from [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture\\_statistics\\_-\\_cultural\\_employment](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_cultural_employment).



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## 3. Cultural Participation

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*This section focuses on the human-centered dimensions of Türkiye’s creative economy, including cultural participation, digital engagement, and education. By addressing access, inclusivity, and skills development, it highlights the importance of fostering creativity and innovation for future generations.*

### Cultural Participation<sup>41</sup>

- In 2022, in **Türkiye**, 19.8% of men and 19% of women participated in cultural activities, while in the EU, women participated in cultural activities at higher rates than men.

### People participating in cultural activities at least once in the previous 12 months (% of population aged 16 and over), 2022<sup>42</sup>

Country	Cinema	Live Performance	Cultural Sites
<b>Türkiye</b>	<b>14.3</b>	<b>6.2</b>	<b>7.9</b>
Poland	38.1	18.7	31.6
Portugal	26.4	30.08	36.2
Luxembourg	49.2	48.5	63.6
Netherlands	44.5	37.7	43.8
Serbia	22.7	20.5	12.8
Greece	26.4	28.1	17.9
Denmark	52.4	45.7	54.1
Romania	14.5	10.4	13.6

- In **Türkiye**, participation in cultural activities in 2022 by age group was as follows: **35.9% of people aged 16-29**, 18.4% of people aged 30-54, 7.1% of people aged 55-64, and 3.4% of people aged 65 and above.

<sup>41</sup> Eurostat, *Culture statistics - cultural participation*, European Commission, August 2024. Retrieved from [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture\\_statistics\\_-\\_cultural\\_participation](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_cultural_participation).

<sup>42</sup> Eurostat, *Culture statistics - cultural participation*, European Commission, August 2024. Retrieved from [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture\\_statistics\\_-\\_cultural\\_participation](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_cultural_participation).



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- In 2022, the participation in cultural activities by frequency among people aged 16 and over was as follows:
  - 80.6% did not participate in cultural activities in the last 12 months
  - 15.2% participated 1 to 3 times
  - 4.3% participated at least 4 times.
- In 2022, among persons with disabilities aged 16 and over in **Türkiye**, the participation in cultural activities was as follows:
  - 5.0% participated in cinema
  - 2.1% attended live performances
  - 3.5% visited cultural sites.

**For comparison, in the EU, Denmark has the highest participation rates in cultural activities among people with activity limitations. In 2022, the participation rates were:**



**43.0% in cinema**  
**37.5% in live performances**  
**46.5% in cultural sites.**

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- In **Türkiye**, in 2022, the percentage of people practicing artistic activities once a year or more was as follows: Males: 21.7%, Females: 24.4%. For comparison, in Denmark, which has one of the highest rates in the EU for people practicing artistic activities once a year or more in 2022, the figures are as follows: Males: 51.7%, Females: 67.4%

#### **Use of ICT for cultural purposes<sup>43</sup>**

- In **Türkiye** the use of the internet for selected cultural purposes in 2022, among people aged 16-74 , was as follows: (In order from most to least):
  1. Watching internet-streamed TV or videos
  2. Listening to music
  3. Reading online news, newspapers, or magazines
  4. Playing or downloading games

<sup>43</sup> Eurostat, *Culture statistics - use of ICT for cultural purposes*, European Commission, July 2023. Retrieved from [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture\\_statistics\\_-\\_use\\_of\\_ICT\\_for\\_cultural\\_purposes](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_use_of_ICT_for_cultural_purposes).



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- In 2022, in **Türkiye**, the use of the internet for buying cultural goods and services, in order from most to least, was as follows:
  1. Films or series as a streaming service or downloads
  2. Music as a streaming service or downloads, and printed books, newspapers, magazines
  3. E-books, online magazines/newspapers
- In the EU, the number of tertiary students in culture-related fields of education represents approximately 14.25% of the total number of students. In **Türkiye**, the percentage of students in culture-related fields of education is approximately %13.8.<sup>44</sup>

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<sup>44</sup> Eurostat, *Culture statistics - culture-related education*, European Commission, May 2024. Retrieved from [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture\\_statistics\\_-\\_culture-related\\_education](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_culture-related_education).



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## 4. Regional Outlook in Türkiye

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Türkiye's creative economy is shaped by its regional diversity, spanning major metropolitan hubs, emerging creative centers, and regions with potential for development. The spatial distribution of creative industries follows patterns of economic concentration, infrastructure, and policy interventions. While globalized creative sectors like digital content production, gaming, and software development flourish in urban centers, more traditional creative industries, including handicrafts, cultural tourism, and performing arts, have a strong presence in Anatolian regions.

Data on Türkiye's regional creative economies highlight a significant concentration of creative industry turnover in a few key regions. As of 2015, the five leading regions in terms of creative economy turnover were<sup>45</sup>:

1. **İstanbul (TR10)** – 73.9%
2. **Ankara (TR51)** – 9.7%
3. **Kocaeli, Sakarya, Düzce, Bolu, Yalova (TR42)** – 3.4%
4. **İzmir (TR31)** – 2.6%
5. **Antalya, Isparta, Burdur (TR61)** – 2.5%

Together, these regions accounted for **over 90% of Türkiye's total creative economy turnover**, underscoring the **dominance of metropolitan and industrially developed areas** in the sector.

While İstanbul remains the **undisputed center**, generating **nearly three-quarters** of the country's creative economy turnover, its **regional share has declined from 80% in 2010 to 73.9% in 2015**. This shift suggests a **gradual diversification**, with other regions strengthening their role in the creative economy. Notably:

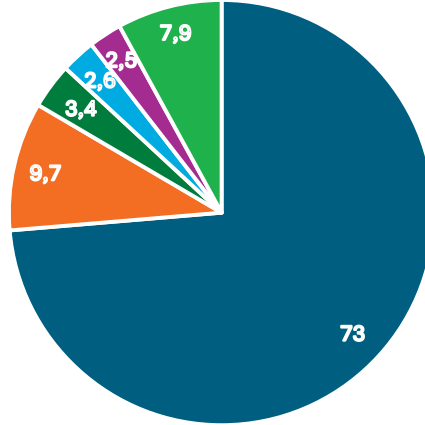
- **İzmir (TR31)** increased its share from **1.6% in 2010 to 2.6% in 2015**, indicating **growing creative sector activity** in the region.
- **The TR42 region (Kocaeli, Sakarya, Düzce, Bolu, Yalova)** saw an even more **significant rise**, doubling its share from **1.6% to 3.4%** over the same period.

<sup>45</sup> İzmir Development Agency. (2021). *Analysis of the Creative Industries in Turkey at NUTS-2 Regions Level: Focus on İzmir*. İzmir Development Agency.



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### Shares of Regions within the Overall Turnover of Creative Economy (%), 2015.



■ TR10 ■ TR51 ■ TR42 ■ TR31 ■ TR61 ■ Other regions

When analyzing employment figures in the creative industries across regions, the ranking shifts compared to turnover. As of **2015**, the regions employing the highest number of workers in creative industries were:

1. **TR10 (Istanbul):** 167,000 employees (58.5%)
2. **TR51 (Ankara):** 35,000 employees (12.3%)
3. **TR31 (Izmir):** 13,000 employees (4.6%)
4. **TR61 (Antalya, Isparta, Burdur):** 12,000 employees
5. **TR41 (Bursa, Eskişehir, Bilecik):** 9,000 employees

According to the İstanbul Foundation for Culture and Arts (İKSİV) report, *Local Cultural Ecosystem in Türkiye*<sup>46</sup>, the scope and diversity of cultural life across different cities reflect a dynamic and multifaceted ecosystem. The report, based on interviews and focus group meetings, highlights a broad spectrum of cultural activities, ranging from traditional crafts to contemporary arts, including concerts, exhibitions, festivals, biennials, workshops, and theatrical performances. One notable finding is that cultural activities are often structured around key moments in the annual calendar, such as official and religious holidays,

<sup>46</sup> İstanbul Foundation for Culture and Arts. (2023). *Local Cultural Ecosystem in Türkiye*. İstanbul Foundation for Culture and Arts.



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international commemorations (e.g., World Environment Day, Women’s Day), sports events, and natural seasonal cycles like harvest festivals. These activities demonstrate that cultural engagement is deeply woven into the social and communal fabric of cities, rather than being limited to institutional or market-driven creative industries. Another significant observation is the strong presence of amateur theatre initiatives in nearly every city studied. These range from small-scale performances in converted apartments to fully equipped municipal theatres with professional infrastructure.

Many discussions on the creative economy focus on **formal, high-value-added industries**, such as film, gaming, advertising, and design. While these sectors play a crucial role, **regional creative ecosystems in Türkiye have their own unique trajectories**, often tied to **heritage, community engagement, and non-market cultural production**. Therefore, a **one-size-fits-all model, shaped by the dynamics of metropolitan creative industries, is unlikely to be effective** in fostering regional creative economies.



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# INSPIRE Research Highlights\*

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\*This section presents key findings and insights from research conducted under the INSPIRE project, focusing on Türkiye's creative economy.





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# 1. Training Needs Analysis: Future Skills & Policymaking

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## Introduction

Developed within the framework of the INSPIRE project, this study combines two complementary analyses: an examination of policymaking training needs and an exploration of future skills required in the creative industries. Together, these studies address the evolving demands of the creative economy, offering insights into how public sector managers and creative leaders can better navigate and support this dynamic sector.

The policymaking analysis highlights challenges faced by central and local government officials in designing and implementing effective cultural policies. It identifies specific competency gaps and provides actionable recommendations to strengthen policymaking practices. Meanwhile, the future skills analysis focuses on the growing importance of adaptive leadership, critical thinking, and digital literacy for creative leaders and public sector managers. By synthesizing findings from in-depth interviews with 20 experts and surveys involving 66 professionals, this combined report underscores key training priorities and offers strategies for capacity building.

This section will highlight several striking findings from this analysis to provide readers with a deeper understanding of the critical needs and opportunities in the creative economy.



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## Policymaking Training Needs Analysis: Key Findings & Recommendations

Key findings from the in-depth interviews indicate that public institutions face significant gaps in fundamental knowledge and the effective implementation of policies. These challenges underline the need for targeted training that addresses both theoretical foundations and practical skills, enabling the development of more informed, data-driven, and comprehensive policies for the creative sectors in Türkiye. Below are some of the key points summarised:

- There is a significant lack of fundamental knowledge regarding cultural policy and creative industries policies in most public institutions in Türkiye.
- Departments related to creative industries in public institutions employ individuals from diverse professional backgrounds (e.g., architects, engineers, sociologists, archaeologists, economists, art historians). However, many lack a comprehensive arts and culture management perspective, necessitating holistic training.
- New perspectives must be developed at the intersection of management science and the cultural sector.
- There remains a need for education on policymaking for creative industries within central institutions in Türkiye. A key reason for ineffective policies is the limited number of institutions primarily responsible for policymaking.
- Data-driven policymaking is underdeveloped, with insufficient data collection on creative industries in Türkiye.
- Most municipalities, particularly district-level ones, lack creative industries policymaking. They operate reactively, responding to demands rather than proactively planning comprehensive strategies.
- Training should focus on better harnessing and supporting Türkiye's rich cultural diversity as a critical resource for sustaining creative industries. Long-term development of public demand for creative products and services is essential.
- A holistic approach to creative industries policies is largely absent in Türkiye. Institutions prioritize sectors with higher economic returns, often neglecting others.
- Communication between some key policymaking institutions (e.g., General Directorate of Copyright, Ministry of Trade, Development Agencies) is improving, but gaps remain between others.



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- Training programs should include a module on implementing participatory methods effectively, ensuring decisions are followed up and monitored through established mechanisms.
- Public institutions lack sufficient personnel with expertise in creative industries policymaking. Training and hiring specialized professionals is essential.
- Creative industries initiatives often depend on individual efforts rather than systematic approaches. Sustainable systems independent of individuals are needed.
- Monitoring international agendas and agreements related to creative industries is insufficient. Training should emphasize leveraging these tools for development and global recognition.
- Policies should aim to globalize Türkiye's creative products while preserving cultural diversity, integrating the sector into international markets.
- Training sessions should prioritize practical content, best practices, and case studies over theoretical discussions, with interactive formats preferred.
- Short, cost-efficient training sessions (3-4 days) with hybrid or in-person options are recommended, focusing on interactivity and idea exchange.
- Certificates for participation and scheduling between January and May can boost attendance and engagement from relevant public employees.



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## Polycymaking Training Needs Analysis: Survey Insights

- The survey was conducted within the framework of the training needs analysis for public sector employees in Türkiye, with 34 public sector employees participating.
- 82.4% of survey participants confirmed the presence of units or departments specifically working on creative industries in their institutions.
- 91.2% indicated that their institutions have current projects or support mechanisms for creative industries.
- 76.5% of participants reported that their institutions develop specific strategies and provide in-kind or financial support for creative industries.
- Only 38% of participants stated that policy documents related to creative industries exist in their institutions.
- The least developed area was impact measurement, with only 32.4% of participants indicating that their institutions conduct assessments of their creative industry policies.
- Half of the participants noted that the international policy agenda on creative industries is followed by individuals with personal interest, while 41% indicated it is generally followed by their institutions.
- Only 11.8% of participants believed their senior and middle managers are adequately equipped in polycymaking for creative industries, while 67.6% believed only some managers have the necessary qualifications.
- None of the participants stated that there is no need for training; all agreed that senior and middle managers should receive training in creative industries polycymaking.



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## Future Skills Training Needs Analysis: Key Findings & Recommendations

- **Integrated Global Perspective:** It is recommended that creative industries in Türkiye shift from operating in silos to adopting an integrated, interdisciplinary approach. Training should emphasize globalization strategies, such as leveraging international success across sectors (e.g., music and TV collaborations).
- **Analytical and Statistical Skills:** It is suggested that training on data-driven decision-making be enhanced, particularly in impact measurement and evidence-based strategies. Developing skills for data collection, categorization, and analysis is crucial for supporting comprehensive creative sector policies.
- **Technology and Digital Transformation:** Training should aim to build awareness of emerging technologies such as AI, big data, and Createch. It is recommended that courses cover the integration of technology into creative processes, digitalization, and lifelong learning to stay aligned with evolving tools and trends.
- **Critical and Creative Thinking:** It is advised that public sector employees receive training that fosters innovation and flexibility, encouraging them to approach problems beyond standardized processes.
- **Business and Leadership Skills:** Training should focus on arts management, visionary leadership, talent discovery, and fostering niche markets. Leaders should be equipped with tools to guide creative teams and support diverse talent.
- **Project Management:** It is suggested that training programs provide guidance on planning, execution, and risk management for creative projects. Emphasis should be placed on collaboration, resource utilization, and timeline coordination.
- **Financial Literacy:** It is recommended that creative leaders receive training in budget management, sponsorship acquisition, and funding proposals to ensure financial sustainability in creative initiatives.
- **Copyright and Legal Literacy:** Creative leaders should be educated on intellectual property laws and public sector regulations to streamline public-private partnerships and protect creators' rights.
- **Governance Skills:** Training should address how creative enterprises can better navigate public sector collaboration, enhancing communication with institutions and understanding bureaucratic structures.
- **Environmental Sustainability:** It is recommended that training programs incorporate practices related to the green economy, energy conservation, and sustainability. This will help align creative industries with ecological priorities and improve international competitiveness.



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## Future Skills Training Needs Analysis: Survey Insights

- Private sector leaders emphasize general business management, financial literacy, and strategy development, while public sector managers highlight the need for technology-related skills.
- **Top Priorities for Creative Leaders:**
  1. Financial literacy
  2. Flexibility and agility
  3. Long-term planning
  4. Strategic decision-making
  5. Arts management
- **Top Priorities for Public Sector Employees:**
  1. Artificial intelligence
  2. Big data and data mining
  3. Creative thinking
  4. Adapting digital transformation to business management
  5. Green policies and circular economy



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## 2. State of the Art of Creative Economy Management & Governance

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## Introduction

This section presents key insights from the "State-of-the-Art of Creative Economy Management & Governance" report, which explores the governance challenges and opportunities within Türkiye's creative economy. Drawing on responses from 83 survey participants and 47 stakeholder interviews, the report highlights the fragmented state of governance and the need for coordinated, inclusive approaches.

Türkiye's creative economy plays a vital role in cultural, social, and economic development but faces significant obstacles. Grassroots organizations, private sector collaboration, and data-driven policymaking emerge as critical areas for intervention. The findings emphasize the importance of aligning governance structures with local realities while fostering innovation and collaboration across sectors. By addressing these challenges, Türkiye can unlock the full potential of its creative economy and position it as a cornerstone of sustainable development.



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## Findings

Türkiye's creative economy includes diverse industries, each with unique needs and opportunities. However, governance structures often take a one-size-fits-all approach, neglecting the specific requirements of sub-sectors and regions.

- **Inadequate Financial Support:** Sixty percent of respondents identified insufficient funding as a critical barrier, especially in cultural heritage and traditional arts. Stakeholders noted a lack of support for preservation, sustainability, and cultural exchange.
- **Regional Disparities:** Creative economy activity is concentrated in Istanbul, home to 78% of respondents. Smaller cities and rural areas are often overlooked, limiting their ability to contribute. Stakeholders stressed the need for equitable resource allocation and tailored regional support.
- **Absence of Specialized Governance:** Both surveys and interviews highlighted the lack of dedicated institutions for the creative economy. This absence leads to fragmented policymaking and limits the development of sector-specific strategies.
- **Regulatory Challenges:** Türkiye's creative economy faces critical regulatory challenges that hinder innovation, growth, and global competitiveness. Key issues include outdated intellectual property laws, inefficiencies in licensing and tax systems, and the lack of sector-specific policies to support modern creative practices.
- **Legal Frameworks:** Although recent initiatives by the Ministry of Culture and Tourism, such as collaborations with WIPO and the establishment of creative hubs, have laid a promising foundation, substantial reforms are urgently needed to align Türkiye's legal frameworks with international best practices and foster a more supportive environment for creative industries.



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## Survey Insights

- **Profile of respondents:** Freelancers (37.3%), SMEs/start-ups (33.7%), artists/performers (15.7%), and cultural managers/editors (13.3%) reflect the sector's diversity. 77.1% are based in Istanbul, with smaller representations from Izmir (8.4%), Ankara (4.8%), and other cities (7.2%). 60.2% have over 10 years of experience, while early-career professionals (7.2%) face barriers to entry.
- **Challenges faced:** Bureaucratic inefficiencies (83.1%) and funding deficits (68.7%) are the top barriers. Limited networks (56.6%) and training gaps (37.3%) highlight the need for skill-building and collaboration.



### Subgroup insights on challenges

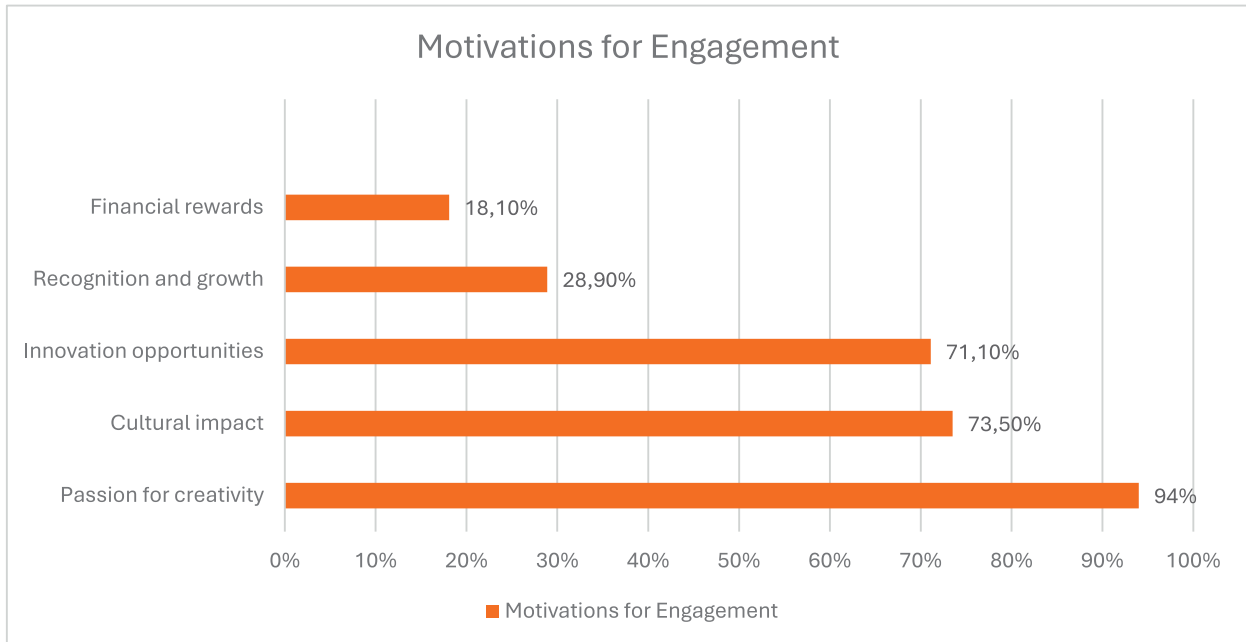
- Freelancers struggle with funding and collaboration opportunities.
- SMEs face regulatory hurdles and lack infrastructure.
- Artists and performers require professional development.
- Start-ups need mentorship and early funding.
- Large enterprises report challenges with regulatory compliance for large-scale projects.

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- **Support Needs:** Financial aid (73.5%) tops the list, followed by policy reforms (53%) and networking platforms (51.8%). Infrastructure (45.8%) and training (34.9%) are critical for smaller regions, while urban areas prioritize global market access.
- **Motivations for Engagement:** Despite challenges, respondents remain committed to the creative economy. The findings highlight the intrinsic and societal value participants derive from their work, while also acknowledging the significance of innovation and financial stability for certain respondents.



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- **Expectations from government policies:** Respondents outlines clear policy priorities. Top priorities are financial support (75%), simplified regulations (60%), and global market access (40%).

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#### Unlocking Potential: Sector-Specific Priorities

- **Performing Arts:** **Global market access** and **partnerships** are common themes in responses about collaboration and regulatory reforms.
- **Visual Arts:** **Infrastructure development** and **simplified regulations** are highly emphasised overall and likely align with visual arts needs, as infrastructure like galleries and studios are key in this sector.
- **Design and Crafts:** **Capacity building** and **financial aid** reflect common challenges in this domain, particularly for individual artisans or small-scale producers.



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- **Collaboration and Knowledge Sharing:** Respondents emphasized the importance of centralized networks and professional platforms to address the fragmentation of existing collaboration mechanisms.
- **Policy and Data Gaps:** Transparent communication from policymakers and reliable, sector-specific datasets are essential to support strategic decisions and ensure informed policy development.



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## 3. Dynamic Mapping of The Creative Economy In Türkiye

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This study presents a comprehensive analysis of Türkiye’s creative sectors, employing established theoretical frameworks and innovative methodologies. The study outlines key steps in dynamic mapping, including defining creative industries, implementing the Creative Grid, measuring creative intensity, and analyzing regional patterns. While acknowledging data and methodological limitations, the study emphasizes refining these approaches to inform more effective policies. By leveraging Türkiye’s unique strengths and addressing sector-specific challenges, this study aims to foster a dynamic and inclusive creative ecosystem, laying the groundwork for future research and development. In this section, key highlights from the study is presented, offering a concise overview of its most significant findings and insights.



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## Dynamic Mapping Methodology: Foundations and Application

Dynamic mapping, developed by NESTA, is an innovative and adaptable methodology designed to analyze the complex and evolving landscape of creative economies. Rooted in global best practices, this approach offers a systematic framework to identify, classify, and measure creative industries and occupations. It provides critical insights into the intersection of traditional content creation, information and communication technology (ICT), and creative skills, which are increasingly central to modern economies.

### Why Dynamic Mapping?

Dynamic mapping was selected for its ability to address structural changes in the economy, particularly the integration of technology and creativity. Unlike traditional classifications, it highlights the qualitative dimensions of creative work and adapts to emerging fields. This methodology is particularly suited to Türkiye's creative economy, where overlapping roles and interdisciplinary collaborations present unique challenges for classification and policy development.

### Key Concepts

- **Creative Trident Framework:** This model categorizes roles within the creative industries into three groups:
  - **Specialist roles:** Creative occupations within traditional creative industries.
  - **Embedded roles:** Creative occupations in non-creative industries.
  - **Support roles:** Non-creative roles that contribute to the functioning of creative industries.
- **Creative Intensity:** Measures the proportion of creative roles within an industry, identifying sectors where creativity is central to operations.
- 
- **Creative Grid:** A set of five criteria to assess creative occupations:
  1. Novel processes.
  2. Resistance to mechanisation.
  3. Non-repetitive functions.
  4. Contribution to the creative value chain.
  5. Emphasis on interpretation rather than transformation.



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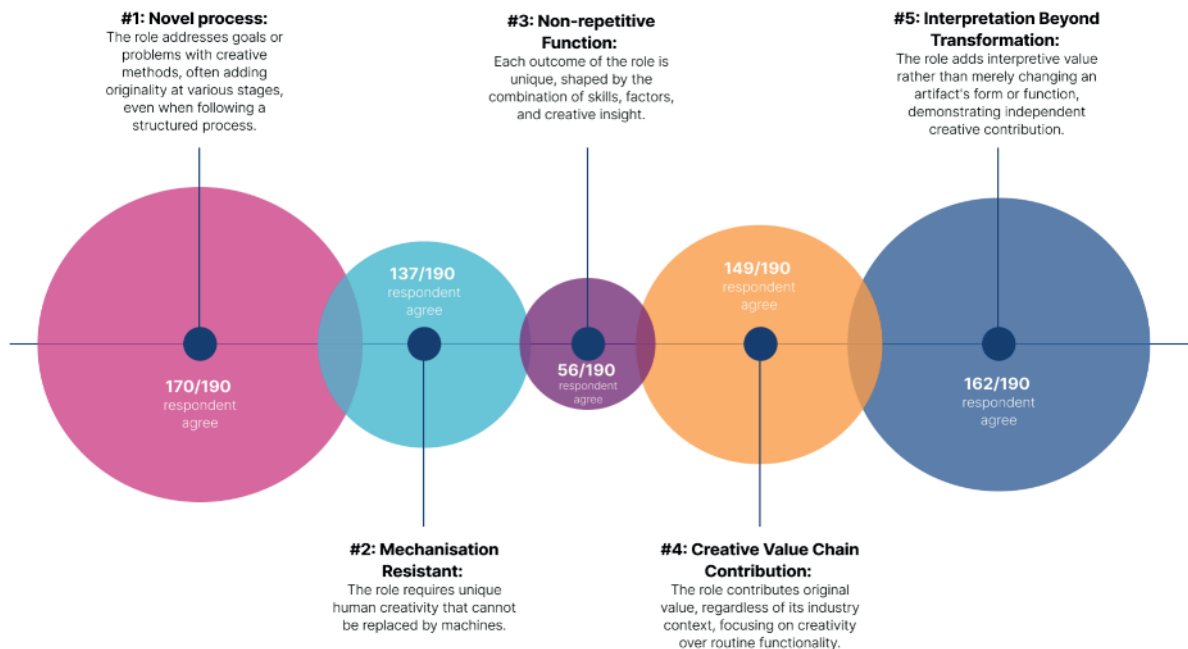
## Methodological Steps

1. **Defining Creative Occupations:** Based on the Creative Grid, occupations are categorized by their creative input.
2. **Measuring Creative Intensity:** Industries are evaluated by the concentration of creative roles.
3. **Reclassifying Industries:** Sectors with high creative intensity are identified as part of the creative economy.
4. **Stakeholder Consultation:** Insights from industry stakeholders ensure relevance and accuracy.
5. **Economic Analysis:** Employment and financial data are analyzed to quantify the creative economy's contribution.
6. **Continuous Refinement:** The methodology is updated to reflect emerging trends and new creative fields.



## CREATIVE GRID BY NESTA

The figure below explores the alignment of creative industries professionals' perceptions of their professions with Nesta's Creative Grid Criteria.





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## RESEARCH FINDINGS

### KEY FINDINGS

- In 2022, **445,000 individuals** were employed in creative industries across Türkiye, while approximately **772,000 individuals** worked in creative occupations overall.
- Creative occupations constituted **32% of the total workforce** in the economy and **19% of jobs** within creative industries.
- The analysis highlights the presence of creative occupations not only in creative sectors but also significantly in non-creative sectors, with **628,661** individuals employed in such roles outside traditional creative industries.
- Creative intensity values mostly cluster in **the 30-40%** range across industries. Lowering this threshold slightly affects employee numbers by a maximum of 17,000, indicating stable creative workforce distribution.
- Around 50,000 individuals in creative occupations are employed in creative industries at a 50-60% creative intensity rate, while approximately 37,000 work in creative industries at a lower 20-30% rate, showing a significant overlap with non-creative sectors.
- A similar pattern is observed in a broader analysis of creative occupations in Türkiye, showing that approximately 50,000 creative professionals are employed in creative industries at a 50-60% rate, and 45,000 at a 20-30% rate, reinforcing the dispersion of creative roles across sectors.
- The analysis focuses on wage earners, excluding self-employed workers due to data limitations, which impacts the full representation of Türkiye's creative economy. Despite these constraints, the dynamic mapping methodology offers valuable insights and aligns with international standards while adapting to Türkiye's unique context. Addressing these data gaps, particularly by incorporating self-employed and public sector workers, is essential for a more inclusive understanding and effective policy development. This study lays the groundwork for future refinements and comprehensive research into Türkiye's creative economy.



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**Table.** Creative Trident Measurement for Türkiye (2022)

Creative Trident		Sectors	
		<i>Creative sectors</i>	<i>Non-creative sectors</i>
Occupations	<i>Cultural and creative occupations</i>	144.030	628.661
	<i>Non-creative occupations</i>	301.009	18.832.462



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## Sector Snapshots: Dynamic Mapping Insights

This section highlights key findings from the dynamic mapping analysis, offering a sector-specific overview of workforce dynamics in Türkiye's creative economy.

### Advertising and Marketing



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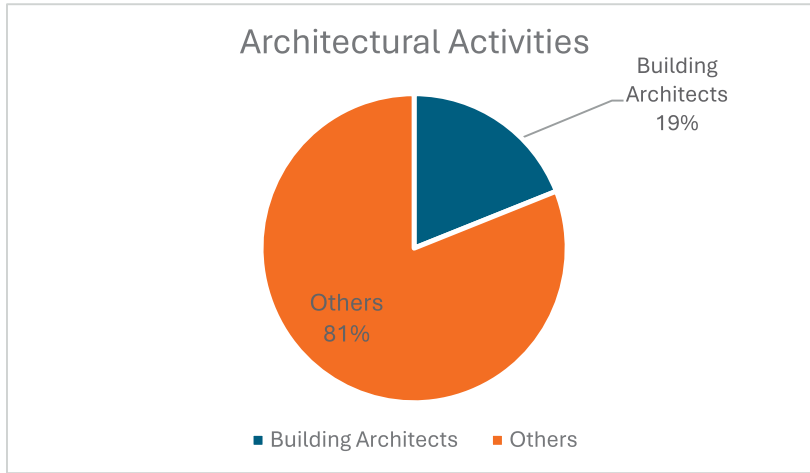
- Occupations like Public Relations Professionals and Advertising and Marketing Professionals show varying levels of concentration within creative industries, with advertising agencies and media representation being notable employers. For instance, Public Relations Professionals have a 15.6% representation in advertising agencies.
- Creative roles are also employed in non-creative sectors, such as retail and accommodation, underscoring their cross-sector relevance.

### Architecture

Building Architects dominate the architectural activities sector (19%), yet a substantial portion work in non-creative sectors, such as residential construction (26%).



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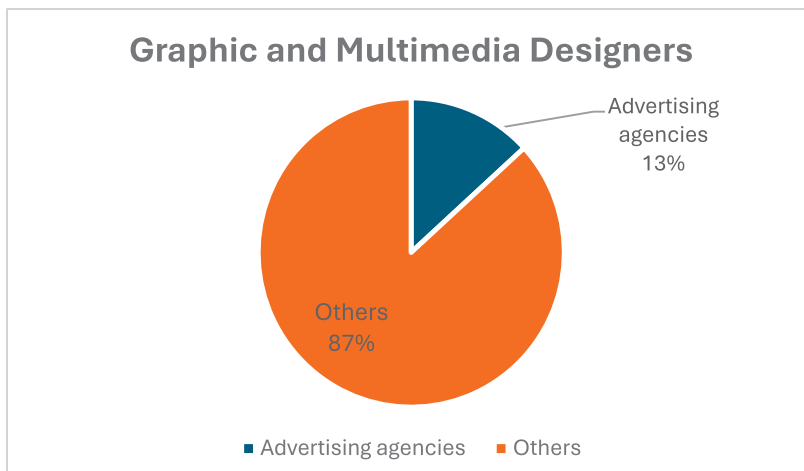


## Crafts

- Traditional crafts occupations, such as blacksmiths and potters, are primarily employed in non-creative industries like construction and manufacturing. For instance, only 0.06% of blacksmiths are employed in jewelry manufacturing. The shares of creative occupation groups within this industry are quite low. The highest share among these creative occupation groups is 0.09%, belonging to Potters and Related Workers.

## Design (Product, Graphic, and Fashion)

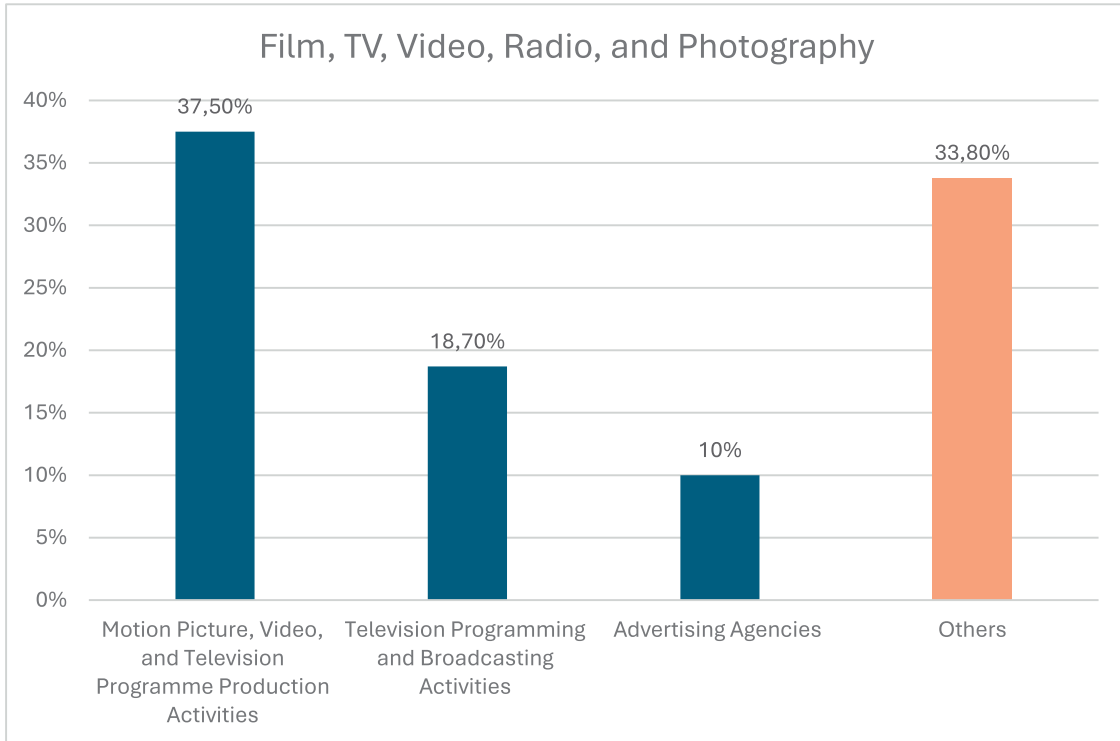
- Graphic and Multimedia Designers have a significant presence in advertising agencies (13.2%) but are less represented in specialized design activities (1.9%).





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- The shares of creative occupations within this industry are Graphic and Multimedia Designers at 5.5%, Product and Garment Designers at 2.5%, and Interior Designers and Decorators at 1.27%.
- **Film, TV, Video, Radio, and Photography**
- The top three industries where this occupation group is most prevalent are as follows: Motion Picture, Video, and Television Programme Production Activities at 37.5%, Television Programming and Broadcasting Activities at 18.7%, and Advertising Agencies at 10%.
- The rates of creative occupations within this category are as follows: Broadcasting and Audiovisual Technicians at 15.3%, Film, Stage and Related Directors at 14.2%, and finally Photographers at 0.82%.

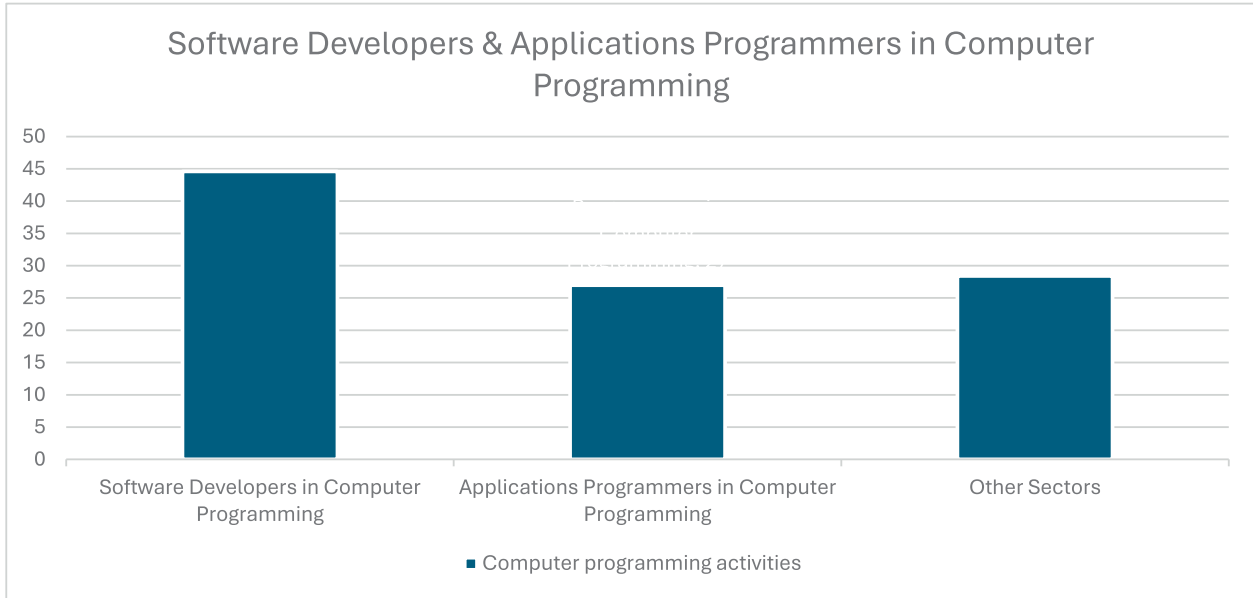


### IT, Software, and Computer Services

- Occupations such as Software Developers and Applications Programmers are heavily concentrated in computer programming activities (44.6% and 27%, respectively).
- Software Developers occupation group also holds the highest representation within the creative industries in the Computer Programming Activities industry.



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### **Publishing**

- Regarding the Newspaper publishing industry group, the top three occupations are as follows: Journalists rank first at 48%, Graphic and Multimedia Designers second at 7%, and Printers third at 4.3%. Translation and Interpretation Activities industry area has the highest number of employees in the Translators, Interpreters, and Other Linguists occupational group, representing 36.8%. Behind it is Cleaners and Helpers in Offices, Hotels, and Other Establishments with 21.6%.

### **Museums, Galleries, and Libraries**

- The industry group Museum Activities, shows Travel Guides taking the lead in occupational distribution with 13.6%. They are closely followed by General Office Clerks with 9.9%, and the third highest occupation group is Personnel and Careers Professionals with 9.7%. In the intersection of creative occupations with the Museums, Galleries, and Libraries industry group, Archivists and Curators have a share of 4.4%, followed by Librarians and Related Information Professionals and Gallery, Museum and Library Technicians, each with 0.9%.

### **Music, Performing, and Visual Arts**

- Among the industry groups under this creative category, Sound Recording and Music Publishing Activities shows that the highest concentration of occupations is in Broadcasting and Audiovisual Technicians, accounting for 14.8%. In another creative industry group within this category, Cultural Education, the Secondary Education Teachers occupation ranks first with 15%. It is followed by Cleaners and Helpers in Offices, Hotels, and Other Establishments with 10.5% and Other Arts Teachers with 10.3%.



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## Conclusion and Key Recommendations

The creative economy represents a significant and growing force for global and national development, with enormous potential to drive both economic growth and cultural innovation. In Türkiye, the sector is particularly poised to capitalize on its rich cultural diversity, emerging talent, and dynamic creative industries. However, realizing this potential requires a robust data-driven approach to policymaking. Accurate and comprehensive data on the creative economy is essential to making informed decisions, developing effective policies, and measuring the impact of creative industries on broader economic and social outcomes. By investing in data collection, improving measurement tools, and integrating data into policymaking, Türkiye can unlock the true value of its creative economy. With the right focus on fostering innovation, collaboration, and the strategic use of data, Türkiye has the opportunity to emerge as a global leader in the creative sector, fostering sustainable economic growth and cultural prosperity for the future.

The following recommendations outline critical actions that can strengthen Türkiye's creative economy, ensuring its long-term growth, resilience, and global competitiveness:

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### 1. Strengthening Data Collection and Evidence-Based Policymaking

Reliable data is essential for developing effective policies and measuring the impact of Türkiye's creative economy. There is a need to enhance **national data collection efforts** to ensure up-to-date, comprehensive, and sector-specific insights. Public institutions, private sector stakeholders, and academia should collaborate to address existing data gaps and establish **standardized reporting mechanisms** that enable long-term tracking of creative economy trends.

### 2. Supporting Sector-Specific Growth and Innovation

The creative economy is not a monolithic sector; each sub-sector has distinct dynamics and needs. Policies should be **tailored to support high-growth areas** such as **CreaTech, digital content, and interactive media**, while also providing structural support for traditional cultural industries. **Cross-sector collaborations** between creative industries and fields like technology, tourism, and manufacturing should be encouraged to unlock new growth opportunities.



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### 3. Expanding Access to Skills and Talent Development

As the creative economy evolves, so do its skill requirements. Education and training programs must be **aligned with emerging trends**, particularly in **digital transformation, AI, and creative entrepreneurship**. Establishing **lifelong learning initiatives** will ensure that both new and existing professionals remain competitive. Strengthening **international partnerships** for knowledge exchange can also help bridge skill gaps and introduce global best practices to Türkiye's creative workforce.

### 4. Enhancing Governance and Policy Coordination

A more **coordinated governance approach** is needed to address regulatory inconsistencies and improve access to resources for creative economy stakeholders. Establishing a **national creative economy body** could provide strategic oversight, streamline funding mechanisms, and facilitate collaboration across government agencies. Additionally, fostering **public-private partnerships** will help create a more sustainable and **resilient** creative ecosystem.

### 5. Boosting Cultural Participation and Market Access

Increasing **cultural participation** is vital for both economic sustainability and social impact. Policies should focus on **making creative industries more accessible**, ensuring that diverse communities can engage with and benefit from cultural and creative activities. Additionally, **expanding international market access** through trade agreements, export strategies, and global networking opportunities will enable Türkiye's creative industries to reach wider audiences and strengthen their position on the global stage.

By implementing these recommendations, Türkiye can unlock the full potential of its creative economy, driving innovation, economic growth, and cultural influence in both regional and international markets.



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