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CREATIVE ECONOMY'S GAUGES. ROMANIA'S CASE

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Abstract. *The aim of this paper is, on the one hand, to outline the main theoretical directions pertaining to the concept of creative economy and, on the other hand, to provide an overview of the creative economy in Romania. Thus, this paper analyses Romania's position as concerns the creative economy and presents several differences between our country and other European countries. In addition, a study on the Romanian youngsters' attitudes is provided in the last part of the paper. Its main purpose is to weight Romania's degree of preparedness for implementing and promoting the creative economy and the creative industries.*

Keywords: creative economy, innovation, creativity

1. Introduction

The new technological conditions consisting in more powerful and cheaper technology enable learning, consumption and creation processes of virtually anything. Under these conditions, the public has access to much more and more complete information and becomes more demanding, but also more creative. Whence the change in the consumer's behavior is reflected by the fact that consumers experiment creative products; increased consumer diversity needs to meet various requirements (mainly referring to ethnicity, gender, age, religion, cognition) thus generating competition; demand for the creative products is highly uncertain because products are experimental and there is no available information about them a priori, while the obtained utility is subjective and intangible; consumers have become richer and better educated and have developed a taste for individualized, customized products.

The creative economy represents one of the greatest contributors to the gross domestic product in many countries, such as Great Britain, France, Germany or the United States of America. The creative economy does not represent, however, a mere sum of the creative industries. Its meaning is far larger and it can only be understood within the context of the relation between information, knowledge and creativity. This context was evoked within the *Lisbon Agenda* as well. Knowledge and creativity together play an essential role in the economy.

2. Theoretical landmarks for the creative economy

The creative industries are, according to the British model: advertising, architecture, arts and antiques markets, crafts, design, designer fashion, film, interactive leisure software, music, television and radio, performing arts, publishing and software. From another standpoint, the one of intellectual property, these industries can be classified within the following categories: *process businesses* (architecture, advertising and PR, marketing services), *product businesses* (film, television, radio, publishing, designer fashion, computer games) and *media* (newspapers, broadcasting, cinema etc.). All these industries produce *symbols* in the shape of cultural goods and services. Process businesses are professional services companies that offer creative services to clients – on demand – such as architecture, advertising/PR/branding as well as other marketing services and design agencies. Product businesses create products that can be replicated but also protected by intellectual property rights, such as film, television and radio, theatre, publishing, design and designer fashion, music and computer games. Media businesses are based on content distribution, offering creative products to communities or audiences with the purpose of educating, informing and entertaining the public.

Another threefold classification is the one belonging to Frontier Economics Ltd. in Full Frontier Report, 2006:

- production (publishing, television and radio, film and video, interactive leisure software designer fashion) – materialized in the production of tangible goods;
- services (advertising, architecture);
- production and/or services (an overlapping of the two) (software and computer services, design, music);
- arts and crafts (arts and antiques, crafts, performing arts) – industries whose main purpose is not a financial one in the first place.

According to OECD, these products are concentrated by micro companies or small and medium enterprises. According to the type of industry and activity, industrial concentration is higher in *media* and lower in *products*. However, reality shows that there is coexistence between large and small companies, proving the interchange between fragmentation and consolidation due to technological advances and growing competition worldwide. Fragmentation appears as the result of technology and competition in its attempt to meet a large variety of consumer needs; consolidation is the consequence of the transition of small businesses to scale economies meant to obtain mass, standardized production. The larger the company, the easier the access to financial sources. According to Creative Industries Task Force, creative/cultural industries have their origin in the individuals' creativity, skills and talent and have potential to create jobs and welfare through intellectual property generation and exploitation. OECD called them *copyright industries.*

Although arts and creativity have been long treated as one and the same concept not only artworks are the result of creative work. Creativity is present in other fields as well such sciences (especially in R&D). Both arts and sciences use the same way of thinking and creative processes; differences come from the reasons why they use them. Also, the way they protect their economic value differs. Thus, creativity is common to both arts and sciences; creative products are different.

Today, the term is more widely used and understood (being mentioned in the Lisbon Agenda and Strategy context)*; in a knowledge economy the importance of these industries to national wealth is more commonly recognized; and the special needs of these industries are reflected more in policy development at national,* *regional and sub-regional levels. The creative industries have moved from the fringes to the mainstream.* (Smith, 1997, p. 3).

Thus, the creative economy is part of the knowledge-based economy. The transition to the knowledge-based economy and society implies a major dematerialization of value-added activities as well as the replacement of product uniformity and homogeneity, consumption and mass governance with creative diversity and responsibility decentralization. Welfare influences people in the direction of spending more time and efforts towards non-material activities, while access to information – the main resource in this new era – is easy and cheap due to informational technologies. Transportation and communication systems facilitating specialization and collaboration; stable rules of the game – for markets or rights – facilitating taking risks which are necessary to creating knowledge; open markets encouraging competitiveness and leading to innovation and customization; reinventing business models – these are all framework elements for the development of the knowledge-based society and economy.

Contrary to some opinions, the concept of knowledge-based economy does not necessarily refer to high technologies or the information technology. The knowledge economy uses knowledge as a main engine for economic growth: knowledge is accumulated, created, disseminated and efficiently used in order to enhance economic development. The purpose of this economy is to encourage creativity in the whole economy – far beyond the creative industries. For instance, applying new techniques in subsistence agriculture can lead to a significant increase of results and the use of modern logistics in the sector of manufacturing can serve larger markets than before. Thus, an economy can make the transition towards the knowledge-based economy through the steady use and creation of knowledge within a broad process of economic development. The consultancy firm McKinsey considers that the traditional ways of creating value added are no longer source of competitive advantage – it refers to *transformational* activities (raw materials extraction and transformation into finished goods) and *transactional* activities (retail sales and transportation). By contrast, tacit interactivity has to prevail under the form of expertise in solving problems and communicating complex ideas.

Resuming the explanation of the creative industries term we have to add the fact the term of *cultural industries* also exists. This term is usually preferred by the French speaking area in order to refer to the same thing. However, there is an inclusion relation between the two – the *creative industry* concept – which contains all the above-mentioned industries – comprises the *cultural industry* term, which mostly refers to the industries mentioned first (architecture, music, film, radio and television, literature, publishing etc.). Culture, a previously distinct sphere of the social life, becomes an element that penetrates everywhere in the society, starting from the design of urban spaces, offices, means of transportation and communication to designer fashion, which reflects the individual's identity, corporation strategies and e-commerce.

The creative industries have started to develop especially due to increased *flexibility* of production (such as small series production), induced by information and communication technologies, but also due to the *specialized* behavior of consumers, who want to use goods in order to build an own identity. These two elements generate a highly semiotic production in the context of digitization and globalization. In this context we have to mention that, while most of the industrial production comes from countries such as India and China, the western world creates most of the products that belong to the creative industries. The only exception is represented by computer games and Internet, which come equally from the three continents: Europe, Asia and America.

On the other hand, the term *cultural tourism* is also to be found. It refers to exploiting history monuments and museum cultural goods in several ways: works, photos, films, CD-ROMs, copies after cultural goods etc. The common thing to these creative industries is that they are all based on the creation and exploitation of intellectual property products, whence the status of *artworks* and not industrial property as it is the case of inventions. Intellectual property rights, together with patents, represent the exchange currency in the information age. Also, these industries can offer *business-to-business* creative services, such as advertising. Moreover, Chris Smith (1997) used to take into account the tight economic links among certain industries, such as: tourism, museums and galleries, heritage and sports. The creative economy uses talent as its main *resource* – the talent to have new and original ideas and to transform these ideas in economic capital and products.

In the book of Eric von Hippel (2005), *Democratizing Innovation*, the collocation signifies the users' ability to develop products and services through innovation for them. Thus, innovative users produce what they need approximately when they need, without depending on companies, which play the role of imperfect agents. Moreover, individual users do not need to develop everything they need because they may also benefit from innovations developed by others and shared freely.

The concept of *creative industries* was initially used to integrate sectors where creative intangible inputs add economic and social value to the British economy. Once adopted this reference framework, the role of culture for the economic development emerges clearly. According to Creative Industries Task Force, the creative industries have the following four characteristics:

- imply activities whose origin lies in individual creativity, skills and talent;
- have potential to create wealth and jobs through the generation and exploitation of intellectual property rights;
- use creative intangible inputs that add more economic and social value than the one added within traditional manufacturing processes;
- comprise and gather traditional cultural industries (such as the performing arts) and cultural industries and information intensive communication of the new economy.

Artwork types are not longer confined to traditional products; for instance, they can be found among software products or computer games as well. The main types of value added contained by a creative product or artwork in the case of creative or cultural industries are:

- *aesthetic value* – reflects beauty, harmony and form as well as other aesthetic traits;
- *spiritual value* – both secular and religious – seeking spiritual meanings shared by all people. Benefits induced by spiritual value include understanding, insight and consciousness;
- *social value* – a critical aspect of artworks is their capacity to create relations among people that otherwise would be separated. It illuminates the society where we live and creates the context where relations and identities could flourish;
- *historic value* – partly, the importance of artistic products stands in that they offer a unique snapshot of the conditions at the moment of creation and offer clarity and the sense of continuity with the present;
- *symbolic value* – expressive objects are repositories of meanings. The symbolic value of an artwork will be the meaning transmitted by the artwork and its value for the consumer;
- *authenticity value* – underlines the fact that the artwork is real, original and unique.

The *Work Foundation* Report, presided by the Department for Culture, Media and the Sports (DCMS), based on the 13 sectors of creative industries, suggests that there are eight elements for the success of the creative economy that any future policy has to take into account. These include, according to *IPA welcomes report on economic vitality of Britain's creative industries*, June 28th 2007:

- *Demand* – consumers experiment creative products through demand;
- *Growing diversity*. Diversity has to meet several requirements: ethnicity, gender, age and religion, as well as cognitive requirements generating competition. Scott Page (2007) details the cognitive dimension into: a. Cognition of diverse perspectives – ways of representing the world; b. Diverse interpretations – ways of categorizing perspectives; c. Diverse heuristic – ways of generating solutions to problems; d. Diverse predictive models – ways of inferring cause and effect;
- *A relatively level playground*. Competition is crucial for the creative process because it distinguishes between good and bad ideas; it selects new technologies and promotes productivity. It can be creative or destructive – when the innovation pace is so fast that existing products become obsolete before reaping all expected benefits. Extreme rivalry can enhance uncertainty by discouraging long-term investments in innovation;
- *Education and skills* to ensure equilibrium and supply accordingly;
- *Networks* to increase capacity. We have to mention that professionals from the creative industries have started to work in other industries as well. For instance, in Great Britain 100% of the professionals in arts and antiques work in the industry while only 40% of the professionals in design actually work in the industry. This proves the growing importance of these industries in traditional companies or in other branches.

Non-price characteristics such as design become more important to companies. On the other hand, a company cannot succeed on the market all alone without mobilizing external resources such as: assuming common risk, access to new markets and technologies, diminishing time to market, sharing complementary competences, protecting intellectual property rights and using external knowledge. Last but not least, networks can work if there is communication, confidence and commitment.

- *Public sector aid and investments* – the creative industries should not be seen as financing objectives through subsidies and grants in the first place but rather as investment destinations;
- *A clear cut and consolidated regime* for the intellectual property rights, especially under the conditions of easy documents transfer and the menace of free riding. To some extent, free riding is a cost of the creative economy;
- *Building business capacity*.

In the October 24th report 2007, DCMS talks about the possibility of defining the creative industries from another standpoint – the Department puts forwards the following classification of the creative industries with respect to the place of activities in the *supply chain*:

- *Layer 1* – potentially comprises the most creative activities that are to be found at the top of any *supply chain.* These include activities such as musical composition in the music industry, programming in the computer games industry and writing in publishing. This layer has been considered the starting point in defining the British creative industries;
- *Layer 2* – comprises those activities that directly support activities in layer 1 in the supply chain, including for instance activities such as casting in performing arts, publishing, computer-related activities in software and computer games. These activities transform the creative activity in tradable products;
- *Layer 3* – is one level farther from layer 1 including those activities that support the first two activities described above. It includes activities such as hardware manufacture that directly support the creative process – for instance, the production of TV cameras or of any hardware product directly used to create TV programs. Also, it can include the next production phase, such as the binding of books in the publishing industry and software replication for software and computer games;
- *Layer 4* – supports activities included in the previous layers. Generally, it includes, for instance, manufacturing and bulk sales of raw materials – such as toner in publishing – and the hardware manufacture used in consumption within creative industries products, such as TVs for television;
- *Layer 5* – comprises the least creative activities in the creative industries. In most of the cases, they refer to retail sales of DVD players for the music industry and consoles for computer games. The figure below is the graphical representation of all these activities.

In this context, activities in layer 1 are certainly the object of the creative industries definition, but a clear demarcation of these activities cannot be made.

Moreover, it has been argued that from layer 3 downwards activities are less likely to belong to the creative industries.

In the October 24th 2007 report the creative industries were analyzed from the *spillovers* (unrewarded benefits) point of view – externalities external to the firm but internal to the market. DCMS considers the following three types of possible externalities or spillovers:

− *Knowledge spillovers*, translated by the new ideas that companies benefit from without rewarding the source company. For instance, they can be generated by entrepreneurs activating in designer fashion; the latter show how the transition from an idea to a business can be made and encourage other persons to follow the same path, establishing their own companies;

− *Product spillovers*, generated by the new products used to the benefit of other firms without rewarding the producer. Starting from the previous example of fashion designer, they are created by those companies whose ideas with potential and easy to understand are adopted by other companies as well;

− *Network spillovers*, representing those benefits stemming from firms' grouping.

The most interesting conclusion of the report is that various creative industries have the capacity to generate the third type of externality, *network spillovers,* bringing on more firms and workers. For instance, places with performing arts companies will enrich the environment, making it more appealing for other persons and companies. Also, *spillovers* are generated either within a market – *intra-market spillovers*, or among markets – *inter-market spillovers.* For the latter, the chain is the following:

New idea (knowledge) →Writing the idea (codified knowledge)

→Including the idea in prototype products (codified knowledge)

→Its existence in the minds of the people who worked on the project (called tacit knowledge by von Hippel (2005)/sticky knowledge).

Inter-market knowledge spillovers can be created by employees leaving an industry for another (transfer of tacit knowledge) or by the employees of other firms in other sectors who learn about these ideas in journals or articles (transfer of codified knowledge). In this case, we refer to *job mobility spillovers* – when professionals bring about benefits to other sectors in the economy once the workplace is changed. Another type of unrewarded benefit is *demand spillover* – firms acting in the creative industries generate such benefits for complementary products in other industries. The positive consequences of externalities are both for beneficiary firms being able to increase their profits as well as for consumers.

According to Richard Caves (2000), the creative industries have some common elements:

− Demand for the creative products is uncertain because products are experimental and consumers do not have a priori information; also, the obtained satisfaction is subjective and intangible. Consumers have become richer and better educated thus developing a taste for customized products; experimental consumption of personalized products can be partly explained by decreasing prices and inelastic demand for basic domestic goods. The higher the income the greater the proportion of it spent on sophisticated and personalized goods and services. Demand for these products presents an increasing marginal utility rather than a decreasing one as it is the case of traditional goods (saturation expressed by Gossen's second law). Besides product personalization, the improvement pace of their quality accelerated as well;

− They become economically viable due to fields such as accounting or marketing. However, there are projects that fail and sunk costs are recorded. In other cases, focus on quality can lead to costs escalation when a product completely differentiates form the others;

− The collective nature of creative production, the need to develop and maintain creative teams with various skills;

− The great variety of creative products. Creative industries are in a continuous anticipation and building of market;

− Vertically differentiated skills;

− The need to coordinate different activities within a short or finite time horizon;

− The sustainable character of many cultural products and the producers' capacity to enjoy the benefits over a longer period after the production.

Risk and uncertainty generated within the creative industries lead to their *industrial organization*, through different activities and the establishment of unions and associations, legal regulations to protect the creative producers, preparing auxiliary personnel as well as intermediaries, agencies and state financing of certain industries. Nevertheless, it is considered that organization and excessive decentralization of decisional processes can result in prejudices to creativity.

However, companies acting in the creative industries are and will most often be small companies because they cannot adapt to this industrial organization and cannot surpass the start-up phase. Usually, small and medium-sized companies are faced with problems of management education, insufficient access to information, underdeveloped networks etc. At other times the nature of these firms itself makes them optimally operate at small dimensions on niche markets – for instance in designer fashion industries. On this type of markets products are personalized and mass production induced by a large company could not meet the requirements of the market. Lower costs products in this field – originating from China for instance – will meet the requirements of others market segments; customers usually do not want these products to be broadly available. This is why organization can differ from the one in the traditional economy; working practices can be based on individual projects or commitment on the short term. Whence, the increased flexibility of these industries, despite the relative dissatisfaction due to instability and irregular working hours.

These aspects are comprised by *organization knowledge spillovers,* which together with *innovation knowledge spillovers* and *entrepreneurial knowledge spillovers* make up knowledge spillovers.

Moreover, the creative industries cannot develop without the existence of a complex framework that can offer all the premises for success. This can be represented by the four general elements, which can be further detailed into numerous articles:

- Infrastructure (physical objects such as: buildings, studios, offices, technical devices, telecommunications, production equipments etc.);
- Links (distribution channels etc.);
- Inputs (human skills such as: intellectual property, conceptual and planning skills – preproduction – and technical skills);
- Markets.

There are two explanations for the fact that most of the creative industries are small companies (*entrepreneurial knowledge spillovers*): either the creation pace of these companies (entrepreneurs) is faster than in other economic sectors or they face problems in developing further from the start-up phase. By contrast, creative industries can have positive externalities through innovation dissemination into the entire economy (*innovation knowledge spillovers*). Also, we can talk about *experiential knowledge spillovers* and *interdisciplinary knowledge spillovers* in the case of these unremunerated benefits.

Product externalities can be: *complementary product spillovers* and *differentiated product spillovers*. The former can lead to the increase of demand for products in other industries. The latter refer to the fact that external companies to the creative industries can adapt a creative product to increase sales in their own industry.

Together positive knowledge and network externalities can be seized as follows: *market expanding spillovers* – markets for complementary products can be created or extended and *market making spillovers* – new and creative products can be created.

Lastly, with respect to network externalities they can be divided into *agglomeration spillovers* and *cluster spillovers*. The former represent benefits that other firms will have when they decide to locate near the group of firms in a creative industry. The latter are the result of companies place nearby and interacting regularly but informally. These interactions lead to the advent of some advantages for all firms in the cluster. It is unlikely that firms in creative industries interact with other firms in the wider economy because they interact on the basis of common, shared interests – for instance common clientele or technology. Clusters form within the same supply chain or if they operate in the same industry.

The creative economy combines creativity with the commercial sense and research. The development of the creative industries is directly linked to the dynamics of the *new economy*, which becomes informational, global or networked. The new economy is based on knowledge – intellectual property – and contributes to the welfare of a nation. If the cultural industries were not substantial sources of revenues and economic growth before, during the past few decades they led to the revival of many European regions where the traditional industries had disappeared and left behind a desert landscape and a decaying society. It is the case of *Newcastle-Gateshead* urban conglomerate in Great Britain, former mining region; at present, this region is flourishing due to the development of the creative industries, and examples can be offered from many other geographic regions in this respect. It was thus proved that the creative industries have a major role in any society through social inclusion, urban regeneration and personal motivation they generate. Hundreds of years before art and culture did not represent productive activities, even though they used to have intrinsic value. Gateshead and Glasgow placed the creative industries and the cultural activities in the centre of their development strategies.

The survey of the Americans for the Arts study shows that Portsmouth, Virginia, with a population of under 50,000 inhabitants is economically comparable to cities of over 100,000 inhabitants especially due to the weight of cultural and arts organizations. It was also noticed that non-residents spend approximately 31 USD at each cultural event, as compared to 20 USD spent by residents. The existence of supply for such cultural manifestations makes this town a touristic destination. It is worth mentioning that 66% of those who take part in cultural events are non-residents. The conclusion of the study is that communities have started to recognize the creative industries, which historically never happened at so large a scale. The revival of a town or region, just like in the case previously presented case can happen due to arts and cultural vivification. However, according to Russ Grazier Jr., President of Art-Speak, there is an inverse conditioning: in a strong economy where there are massive investments cultural organizations flourish. At their turn, these cultural organizations create welfare, transform the city in a destination and create other business opportunities.

Authors such as John Howkins (2001) estimated that in 2000 the creative economy was 7% of the world economy. Similar figures were obtained by the experts of World Bank, who performed independent measurements over the same period. The creative economy is on the increase, with a 5% increase rate in the world and substantially higher values in the USA (14%) and the UK (12%).

In comparative terms, the first European countries regarding the creative industries are Germany, Great Britain and France (Nițulescu, 2007), which account for approximately seven million employees. They are closely followed by Italy and Ireland. Great Britain has recorded a growth pace of the creative industries of approximately 6% per year and benefits from the advantage of the English language as an international language. A report published in April 2006 by *National Endowment for Science, Technology and the Arts* (NESTA) reveals that the creative industries represent around 8% of the British economy. With respect to the Great Britain regions, the South-East is a major hub for the creative industries due to the vicinity of the capital and the access to international and European markets. Moreover, the entertainment industry is as worthy as the financial services sector to Great Britain nowadays because the creative industries give birth to interrelations and contributions to other sectors of the British economy as well as due to the positive impact upon the quality of life at regional and national level.

According to this report, the British audacious cultural exports include music, television shows and computer games. In Great Britain, the creative economy is considered to be a not-yet-told success story, employing almost two million people and generating exports worth more than 4 million pounds (Sky News, 2007) on an annual basis. At regional level, the European Union is the largest exporter for cultural goods, according to UNESCO. Thus, the European Union accounts for 51.8% of the total world exports; however, Asia has become the second largest exporter starting with the year 2002, having a share of 20.6% due to the growth of the video games and visual arts industries in East Asia. At the European Union level, a study of the European Commission carried in 2002 – with respect to film and video, radio and television, video games, books and press publishing, music, design, fashion designer, architecture and advertising – evaluated these industries at 2.6% of the entire European Union gross domestic product at that time (The Work Foundation, Staying Ahead: the Economic Performance of the UK's Creative Industries, 2007, pp. 37, 40).

The growth pace of these industries between 1999-2003 was 19.7%, which is 12.3% higher than the whole economy increase, employing 5.8 million people (2.1% of the total employed population). Later on, from 2002 to 2004, when the employment rate in Europe decreased, the employment rate in the above-mentioned industries increased by 1.9%.

The British DCMS on October 24th 2007 reveals the fact that in 2004 the creative industries were 7.3% of the British gross value added, evolving by 5% from 1997 to 2004, unlike the other economic fields, whose average increase rate was 3%. The same report highlights the fact that for some industries the increase can be higher. Software and computer games were the fastest growing industries – with 9% average increase (as compared to the average rate of increase of the creative industries, of 5%); the contribution to the gross value added was 36%.

3. The Romanian creative economy. Convergence stakes for Romania in the European context

With a view to depict the Romanian creative economy, the first thing to be done is to find an appropriate classification for its creative industries, after looking at examples offered by countries that have already advanced this concept and developed it throughout the past few years. For this, classifications used by other countries need to be studied in order to find the most appropriate version to be applied for the Romanian economy, as well as the existing data at the National Institute for Statistics in Romania. Deciding upon such a classification implies a very clear-cut division of the creative industries following the examples of Great Britain or Australia. Also, in order to optimally quantitatively seize the creative industries in Romania there has to be a national concern for defining and classifying them according to the specificities of our country.

Within the classification approach of the creative economy in Romania, I will briefly recall the extant classifications in Great Britain and Australia. As mentioned above, in Great Britain, the creative industries are: *advertising*, *architecture*, *arts and antiques markets*, *crafts*, *design*, *designer fashion*, *film*, *interactive leisure software*, *music*, *television and radio*, *performing arts*, *publishing* and *software*. In Australia, the creative industries are grouped into larger categories, which are afterwards divided in more detail. The main categories of the creative economy in Australia are: *heritage*, *arts*, *sport and physical recreation* and *other culture and leisure*. The division of these four great categories is done in groups and then in classes.

Within the *Romanian Statistical Yearbook*, the National Institute for Statistics publishes a special chapter dedicated to culture and sport (*Culture and Sport*, chapter 9). In this context, the following are considered to be cultural industries: *publishing* (printed books and brochures entering the legal store of the national library; school textbooks and university lectures; newspapers, magazines and periodicals) and *libraries*; *museums*; *film output and cinemas*; *shows and performance institutions*; *radio and TV stations broadcasts.*

Regarding publishing, there has been a constant increase in the number of titles and a strong decrease in the number of copies over the past 18 years. Insofar as the number of periodicals is concerned, it has increased by roughly 30% over the same period. As for periodicals, they are divided into newspapers and magazines and other periodicals. Relatively, the former do not exceed 11% of the entire number of periodicals.

The most novel thing for the publishing market in Romania is represented by gratuitous press, which has strongly developed over the past few years. This segment still has potential to grow. At this moment, there are over 200 free periodicals, but in order for this type of periodicals to replace the paying press, it has to overpass this stage of development and become true newspapers dedicated to a specialized public. Mostly, gratuitous press is financed by advertising.

The number of libraries has slightly decreased in Romania, while the number of volumes increased on the whole and the number of readers fluctuated around 5-6 million over the period under study.

In Romania, museums are grouped into natural sciences, history of technology and science, ethnography, history of culture, arts and mixed. The museum activity is described by two elements: the number of institutions and the number of visitors. Over the studied period, the number of institutions has increased relatively by around 50%, while the number of visitors today barely reaches its level in 1990.

For the cinema industry, the evolution recorded over the period under study is a negative one. In 1990 there were 4,637 cinemas in Romania and their number has constantly decreased over the past years reaching approximately 85. Simultaneously, there has been a sharp decrease in the number of seats in cinemas, from 235,821 to only 50,220. The same negative evolution has been recorded for the cinema shows, whose number decreased to less than a tenth and the audience was 45 times lower in

2005 than in 1990. Despite this evolution, the film production in Romania has had a positive evolution for long, medium and short films and TV serial films as well (episodes). By contrast, short cartoon films and documentary and scientific films have become almost inexistent on the market.

The Romanian film industry is, unlike underdeveloped industries such as the arts and antiques markets or the crafts, constantly developing. Talented actors, film directors and technicians, low wages and the quality of services have improved the standards of the Romanian film and brought on foreign producers. Thus, many of the Romanian cinema productions have been nominated and won awards within international competitions (Cannes, Copenhagen, Thailand, Turkey, USA), and a series of movies were made by foreign producers in Romania.

As shown by the *Romanian Statistical Yearbook* also, the number of spectators continues to decrease. The reason, however, is not the lack of appetite on behalf of the Romanian public for movies, but the poor number of cinemas and seats, respectively. Agency Champions published the figure of 2,257,246 for the number of tickets sold during 2007, while in 2006 the number of sold tickets was 2,776,526 according to the National Centre of Cinematography. In reality, the number of entries is higher, because Champions counts only film premières. As the second projection (after the première period) attracts 15% more spectators, a higher figure can be estimated, but still under the one of the previous year, 2006. However, estimates show higher revenues than in 2006.

According to the *European Cinema Yearbook* of October 2007, in 2006 Romania was having one screen for every 200,000 inhabitants. Bulgaria and the Czech Republic are far above with a ratio of 1:62,250 and 1:14,600 respectively. However, the number of tickets sold per number of screens is higher for Romania (25,700) than for the Czech Republic or Bulgaria (16,400). Whence, we can draw the conclusion that the scarcity of cinemas is the cause of the reduced number of film-goers in Romania. According to the European Cinema Yearbook, 40% of the number of screens and 80% of the market share regarding the number of tickets sold are concentrated by three towns: Bucharest, Cluj-Napoca and Oradea, which means that less than 15% of the country population provides approximately 88% of the total gross revenues from film tickets sales. Drawing a parallel, Berlin, Hamburg and Munich – the first three cinema markets in Germany – cumulate 14% of the market (in terms of tickets sold and revenues from sales).

From the perspective of cinema gross revenues, Romania can compare to Slovakia, whose population is only 5.4 million inhabitants. Comparatively, in 2006, Romania's revenues were 8.284 million euros, Hungary's were 38.076 million euros, Poland's 120.81 million euros, the revenues of the Czech Republic were 37.559 million euros and Bulgaria's were 6.119 million euros. At this moment in Romania there are 10 multiplex cinemas, 113 screens over the country, 49 screens situated in multi-screens (2-4 screens) or multiplex (over 4 screens). 43.4% of the screens are to be found in multiplex cinemas, the highest percentage in Central and Eastern Europe.

The cinema entry frequency is 0.13, expressed as a ratio between the number of tickets sold and the entire population (this ratio is the lowest in Europe). The average price of a ticket was 1.53 Euros in 2007, while the average price in Western Europe was 6.91 Euros, with the maxima of 8.7 euros in Norway and Sweden.

Besides these aspects, the Romanian cinema ticket is subject to the highest number of taxes in Europe: 2% show tax, 2% cinema stamp, 8% tax for supporting the Romanian movie (through the National Council of Cinematography), 19% VAT. On the whole, taxes arise to 31%, whence the ascending evolution of prices and the decreased number of cinemas.

Insofar as performances are concerned, they have had a steadier evolution than cinemas. The number of performance institutions has remained approximately the same over the studied period, while the number of performances has decreased by roughly 15% and the audience diminished by around 40%.

Regarding state-owned radio and television, the number of radio broadcasts doubled and the number of TV broadcasts increased four times over the same period. The television industry in Romania has increased during the past years - the total turnover of commercial television is estimated to have increased by 73% with regard to the previous years. The increase in turnover and profits is mainly explained by reduced investments and increasing advertising revenues. As the Internet penetration rate is not that high as in West European countries, competition on television and video content market is expected to increase in the near future. According to a study carried by *Bain & Company*, the video content market sales is expected to grow by 4-6% per year until 2012 due to new digital platforms and video on demand consumption.

The Romanian radio industry is profitable if both of the following conditions are complied with: the radio station should be located in Bucharest and should have national coverage. The radio market is worth less than the television market. In autumn, radio stations organize broad campaigns because it is in autumn that surveys on this market are done.

Taking after the Australian model, sport can also be included as part of the creative industries. Its dimension can be evaluated according to the number of affiliated sport sections, legitimated sportsmen, full time coaches or referees. The medals obtained, the international rankings, and the number of participations in prestigious competitions represents only some of the ways of evaluating the results in this field. We will not insist, however, on this field within this quantitative presentation of the creative industries of Romania.

The existing data about Romania allow us to include advertising, architecture (in the broader meaning) and design (in the broader meaning, not divided into design and fashion designer as it is the case for the British classification) in the creative industries category. By contrast, official statistics do not offer too much information about *crafts*, *video games*, *music* or *software*. In the Romanian Statistical Yearbook, there is a specific chapter called *informatics and connected activities*, within which all elements of the field are included without any distinction.

At institutional level, the number of public administration institutions in the cultural and recreative activities and the number of private administration institutions in culture and sports can be analyzed. Obviously, the latter exceeds the former by far. With respect to the first category, the number of institutions has fluctuated over the past 18 years from around 45 to almost 500. By contrast, the number of private administration institutions has constantly increased from one year to another, from approximately 11,500 to more than 50,000.

The Romanian advertising market is dominated by nine big communication groups. In 2006, the cumulated turnover of the nine elephants surpassed 370 million euros. For Romania, 2007 represented a fruitful year for advertising. This performance is illustrated by the changes on the market: advertising investments, the move of some clients from a company to another, a new generation of managers and international awards. The new management has tried to satisfy the demand of the youth generation of consumers and it is better connected to the modern technologies of promotion and communication.

Moreover, the visibility of the Romanian advertising has increased once with its presence in the IAA (*International Advertising Association*). In addition, the changes in the Romanian economy (for instance, the private pensions launch) have established new standards for creativity and numerous trainings and conferences pertaining to the industry have started to be organized by international specialists in Romania. A novelty in the Romanian advertising is represented by the auctions for media and creation called pitches.

The technological and communication boom has forced the Romanian entrepreneurs in advertising to develop firms specialized in non-conventional communication – Internet, direct marketing, branding, shopper marketing and events.

The advertising market is becoming an important stake as the total worth of online advertising in Europe will reach 16 billion euros by 2016, according to specialists, which represents more than double the worth in 2006. As a consequence, expenses for virtual advertising will reach a fifth of the media budgets over the next five years; the market share will reach 18% (from 9%), according to a study of the research company Forrester, cited by The Guardian*.* The main reason cited is the increase in the number of users of wideband Internet from 47 million to 84 million. In Romania, almost 20% of the population has home Internet access, according to a 2007 Euro barometer, which means three times less than in EU15. According to the Media Fact Book study in 2007, there were 3.3 million Internet connexions by the end of 2006.

The dynamics of the economy, and implicitly the one of the construction sector in Romania, has generated growth in cascade for the auxiliary sectors, among which architecture can be mentioned. In comparison with the evolution of the constructions industry, architecture is at a moment when firms refuse new contracts due to the scare labor force. At the same time, the salary policy has to be aggressive in order to prevent the phenomenon of the architects' migration towards firms offering higher salaries. As for the architecture fees, they are still five times lower than the European level. It is, however, expected, that this gap be bridged over time. As for the specialists in urbanism between 2005 and 2007, there were 1,198 architects, 72 urbanism specialists and 78 chief architects in the entire country, according to the Registry of Urbanism Specialists in Romania. Also, the architects' profession is represented by 11 national organizations.

Investment in arts and antiques is one of the most profitable businesses on the medium and long term. Trading with arts objects is a generous source of revenues too, although it is still a niche business in Romania. Antiques hunters travel all over the country in search of peasant objects that they buy for low prices and resell for huge amounts. Entering this market is conditioned by stout knowledge in the field, a correct evaluation of the objects, the knowledge of their history and the identification of the right moment for resale. Nevertheless, specialists consider that in Romania there is no antiques market or organized trade. Trade is only organized during special fairs 2-3 times a year.

The actors on the arts and antiques market mainly belong to the following five categories:

- The ones who buy antiques to make them presents;
- Intermediaries – the ones who do business out of this activity;
- Antique collectors, the most loyal clients of antiques shops;
- Snobs;
- Rich Romanians (who mostly acquire old and good-taste furniture).

Unlike the traditionally touristic countries, Romania has not yet started to develop the crafts industry. Moreover, for the crafts to survive governmental aid is needed. In this respect, there is a multi-annual national program that supports crafts. *The objective of the multi-annual national program over the period 2006-2009 for supporting crafts is the development of crafts in Romania, the craftsmen class, who carry out their activity individually or in an organized manner by dint of associations or organizations, especially in rural areas, but also in the town, the protection of the professions that imply a large number of manually executed operations, the re-launch of products and services obtained by craftsmen, especially the traditional ones, including folk art objects and crafts, as well as the promotion of these products and services on national and international markets* (The multi-annual national program over the period 2006-2009 for supporting crafts is the development of crafts, 2007).

The aim of this program is to stimulate crafts, to improve craftsmen's access to information, to promote products obtained by simple technologies, mainly manually manufactured using traditional technologies, to stimulate domestic demand for such products, to support this sector in order to win new external markets, especially for the traditional product and to increase the number of jobs by attracting the young generation and women.

Countries such as France, which exploits Eiffel Tower under the shape of souvenirs or the Netherlands, well-renowned for tulips and wooden shoes, earn a lot from tourism and trade with these products. Thus, the worth of the souvenirs business in the Netherlands is over 100 million euros per year. Comparatively, the crafts industry in Romania is not developed as many of the touristic objectives are not transposed into souvenirs (The Houses of Parliament, The Romanian Athenaeum, the CEC building, Șuțu Palace etc.).

The program budget mainly has two destinations: non-refundable allowances the eligible beneficiaries and technical assistance. Allowances may support the following activities:

a) elaborating and producing printed promotion materials for the enterprise, written in foreign languages;

b) building a website for promoting the activity and the products;

c) participating at trainings;

d) acquiring different tools needed for the activity while still keeping the predominantly manual work.

Craftsmen are also grouped in professional associations, such as the *Professional Association of Folk Art Producers – ROMARTIZANA* or the *National Association of Crafts Co-operation – UCECOM.* The former represents the producers' interests in this field by promoting and developing the rich creation traditions of our country adapting them to the requirements of modern life.

In the context of globalization, the activity of art objects production and sales plays an essential role in preserving the national identity via the traditional elements of Romanian folk art.

Romania has started to understand that design is one of the highly creative industries that bestow competitive advantage and market profitability. The constantly diversifying demand of consumers and the desire to experiment new products turn design into a promising field. In this society people want to stand out and self-define through their consumption. This is why most often consumers prefer customized products reflecting their identity.

A measure of the increasing importance of design is represented by independent design competitions that have started to be organized in Romania. For instance, such a competition focused on four areas: graphic design, industrial design, car design and freestyle. Web design is equally important as it has developed during the past few years in Romania. This requirement has come from the fact that most of the businesses are done (also) in the virtual space and shop windows have moved on the Internet and they need to be decorated accordingly.

A separate branch of design is designer fashion. According to the British classification, the two industries appear to be distinct. In Romania, besides the fashion designers and domestic producers a new phenomenon is taking place: „Made in

Romania". This signifies that a large production of the great designers and retailers takes place in Romania, in the lohn system. However, this type of production, as it is defined by the lohn contract, is just an execution of the order placed by a beneficiary (foreign company) by the Romanian company, according to some technical specifications. The lohn production does not confer long-term advantage and is not a creative activity either. Consequently, the fashion industry should develop on the basis of domestic design, which confers long-term advantage.

The main characteristic of the video games industry is the low level of production costs compared to the level of sales. The same trend is to be found on the Romanian market. In 2006, sales reached 5.5 million euros and in 2007 around 7 million euros, expecting sales of over 10 million euros for 2008 (the biggest European market is England, with 6 billion euros). In Romania, 90% of the games are dedicated for personal computers, while only 10% are for consoles; in Europe, the trend is opposite: 75% of the market belongs to consoles. Still there is no consoles culture in Romania; computers are preferred for their multiple functions. At the beginning of 2007, 20% of the gamers were using consoles. At world level, the games market is expected to grow by 50% over the next four years because more consumers are about to enter the market as more products are created. An example of how the games market is supported is shown by France. France adopted a law according to which game producers are supported by the state if they produce original and quality games, which can contribute to cultural diversity.

According to Eurostat, the number of Romanians who use Internet facilities is far lower than the European average, whence the reduced access to games accessible on the Internet. The study shows that 4% of the Romanians create a website (Bulgarians 4%, Icelanders 31%, UE 27 10%), 5% make online phone calls (Bulgarians 16%, Icelanders 33%, UE 27 25%), 6% find, download and install computer programmes (Bulgarians 6%, Icelanders 41%, UE 27 52%), 12% participate in online discussions (Bulgarians 20%, Icelanders 37%, UE 27 33%). Also, 7% of the Romanians transfer video or audio files using peer-to-peer connection (Bulgarians 10%, Icelanders 23%, UE 27 13%), 21% send emails with attachments (Bulgarians 27%, Icelanders 76%, UE 27 72%) and 23% use search engines (Bulgarians 32%, Icelanders 86%, UE 27 80%). The study included household with at least one member aged 16-74, during the first half of 2007.

The music industry is first of all characterized by piracy at Internet level. This situation is mainly generated by the low purchasing power of consumers, but also by the desire of the young people of acquiring novelties in a very short time. The most efficient methods for fighting this phenomenon are: educating the public, as well as adopting some adequate legislative measures. The ones who lose because of piracy in the music industry are: artists, legal traders, record companies and the state.

At European level, the European Commission plans to create a common market for music, film and online games. According to a study of the European Commission, this change would lead to an increase of the revenues from sales of online content by four times, up to 8.3 billion euros by 2010. The Romanian IT market is expected to increase by 11% up to 1.37 billion euros, but the expected pace will be lower than the one recorded for the year 2007, which was 16.7%, according to a IDC study. Still the largest part of this increase will be generated by the hardware market. The increase estimated for the software market in 2008 is 11%.

4. Attitudes towards creativity and the creative industries in Romania

Creative people have an opportunity to start a business as a result of their will of creative expression that the public requires and consumes. A main advantage of these industries is provided by the relatively reduced production, as well as by the amateur character of the existing production.

In view of evaluating the climate of the Romanian economy for developing the creative industries, the attitudes of consumers and potential consumers have to be analyzed and known with regard to these industries. To this purpose, we conducted a study on a sample of 106 young persons, aged between 18 and 30 (the average age of the respondents is 22.6 years). The reason why the study was carried on young people is that, usually, youngsters are more open to novelties and because the creative industries represent one of the sectors with the most dynamic evolutions and unique traits, such as a priori and experimental consumer demand and the need to create one's own identity by consuming cultural and/or creative goods etc.

The respondents all come from urban areas and are holders of Baccalaureate (53.77%), Bachelor's degree (30.19%) or master's degree (16.04%). Half of the respondents (50.94%) are presently enrolled in higher education institutions. The professions of the respondents cover a very wide range of qualifications, such as: programmers, engineers, civil servants, PR and communication specialists, journalists, economists, teachers and professors, tourism agents, linguists, architects and free lancers.

Out of the total number of respondents, 78.3% consider that people, irrespective of their gender, are potentially equally creative, while 16.98% consider that women are more creative and only 4.72% believe men are more creative than women. No correlation has been found between the gender of the respondents and their attitude towards the potential creativity of genders.

When asked whether they had ever trenched upon other people's intellectual property rights through replication, imitation, forgery, unauthorized use, piracy and other similar procedures, 24.53% said they had not resorted to such practices, while the wide majority (75.47%) admitted having violated intellectual property rights through one or more possible ways.

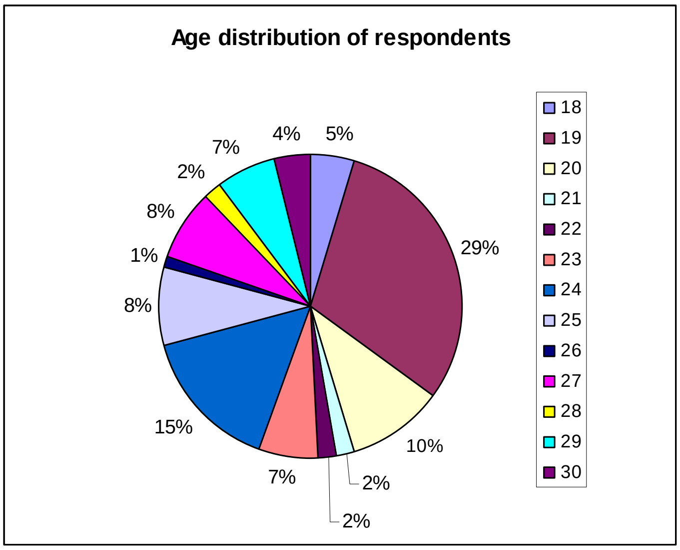

Figure 1. The age distribution of respondents

One first conclusion is that the lack of gender discrimination on behalf of the population represents the proof of their openness and tolerance, which, in Richard Florida's (2002) opinion, is crucial for the existence of the creative industries. On the other hand, the environment for such creative activities is not quite favorable because illegal consumption of creative products (other than acquisition and payment) draws the impossibility to consolidate producers in this sector.

Using the British classification of the creative industries (advertising, architecture, arts and antiques markets, crafts, design, designer fashion, film, interactive leisure software, music, television and radio, performing arts, publishing and software) the respondents were asked to score each of these industries with a mark ranging from 1 to 10 (1=the lowest mark; 10=the highest mark) in order to evaluate the creativity and flexibility of the activities implied by each of the industries.

Below are the scores obtained by each of the creative industries, as well as some other comments.

− One can notice that the highest average score for creativity is obtained by design (8.85), followed by advertising (8.66) and designer fashion (8.39);

− At the other side, the industries with lowest average scores are arts and antiques markets with 6.21, crafts with 6.51 and television and radio (6.78);

− The modal value 10 (the most frequent score for the industry) was obtained by advertising, architecture, design, designer fashion, film, music and software;

− The modal value 6 (as the most frequent lowest score) was obtained by crafts;

− As for 9, the maximum median score, the best performers in the youngsters' opinion are advertising, architecture, design, designer fashion, film and music (industries for which the modal value is 10).

Table 2

Evaluating the creative industries from the perspective of creativity and flexibility of the activities involved

Creative industry	Creativity average score	Creativity modal	Creativity median	Flexibility average score	Flexibility modal	Flexibility median
Advertising	8.66	10	9	8.58	10	9
Architecture	8.22	10	9	6.36	8	7
Arts and antiques markets	6.21	8	7	6.03	7	6
Crafts	6.51	6; 7 and 8	7	6.34	6	6
Design	8.85	10	9	8.29	9	9
Designer fashion	8.39	10	9	8.23	10	9
Film	8.36	10	9	7.77	8	8
Interactive leisure software	7.30	8	8	7.35	10	8
Music	8.16	10	9	8.18	9 and 10	9
Television and radio	6.78	7	7	7.16	8	8
Performing arts	8.08	9	8	7.40	8	8
Publishing	7.21	8	8	6.93	8	7
Software	7.31	10	8	6.55	7	7

From the perspective of the flexibility of the activities involved (rapidity to adapt to changes on the market, flexible types of employment, location change without bringing prejudices to the industry etc), youngsters scored advertising best (8.58), followed by design (8.29) and designer fashion (8.23). With very slight differences for the first two places, these are also the best performers at creativity. The modal value 10 (the most frequent score for the industry) was obtained by advertising, designer fashion and music; these industries had the same position for creativity as well. The modal value 6 (as the most frequent lowest score) was obtained again by crafts. As for 9, the maximum median score, the best performers in the youngsters' opinion are advertising, design, designer fashion and music; all except design obtained 10 as modal value.

Also, the creative industries have been ordered hierarchically, according to how necessary their products and services are for the personal consumption. The hierarchy established is the following:

1. Music;
2. Software;
3. Television and radio;
4. Publishing;
5. Film;
6. Designer fashion;
7. Design;
8. Architecture;
9. Advertising;
10. Crafts;
11. Performing arts;
12. Arts and antiques markets;
13. Interactive leisure software.

Labeling an industry as being cultural or not is quite difficult to do. Some industries are cultural by excellence; others are to be found at the boundary of culture, if culture is deemed in the traditional way. The opinions of the respondents have highlighted that performing arts are considered by 94.34% of them as being cultural industries as well. Performing arts are closely followed by music (87.74) and film (80.19%). At the opposite side is to be found advertising (7.55%), software (6.60%) and interactive leisure software (2.83%).

From the perspective of the money spent on creative products (goods and services belonging to the creative industries under study), this research reveals the fact that an average of 20.59% of the monthly family budget is directed towards such destinations. The most frequent answer (modal) was 10%, while the median value was 17.50%.

A large proportion of the respondents (79.25%) considered that they had the necessary skills to work in one or more of the creative industries under study. The youngsters mentioned that they wanted to work in one or more of the creative industries to the same extent (79.25%). However, not all those who said they have the necessary skills to work in one of the above-mentioned industries said they would do; there are persons who admitted not having the necessary skills to work in any such industry, but they expressed the opinion that they would like to work in such fields. The others considered they did not have the necessary skills, and as a consequence, they would not want to work in any of the creative industries under study.

Similarly, 78.30% of the young people comprised in the study mentioned what the most attractive creative industries are at present. The most frequent answer was advertising, given by 55.42% of the respondents. Following advertising, but still very far behind it are design with 21.69% and architecture with 20.48%. At the opposite side are to be found the least attractive industries for a job: interactive leisure software (1.20%), crafts and arts and antiques markets (both with 3.61%).

In justifying their choices for one industry or another, the youngsters offered answers such as:

- the creativity and originality degree implied (55.56%);
- passion for these industries (34.57%);
- the necessary talent and skills (14.81%);
- the flexibility degree implied (12.35%);
- the challenging nature of the industry (11.11%);
- financial reasons (7.41%);
- the industry represents the person (4.94%);
- the necessity of the industry for the society (3.70%);
- the satisfaction obtained by doing such activities (2.47%);
- the responsibility required (2.47%);
- fame (1.23%);
- other reasons (30.8%).

The main conclusion that can be drawn is that the nature of the activity itself represents the main argument for a possible option of working in the creative industries. Passion for these industries, the talent and skills possessed, the flexibility of work in such fields, as well as the challenges faced are other reasons invoked. Financial reasons, though, come well behind. It is once again proven the theory according to which creative workers or the creative class is motivated first of all by the nature of the work, passion for this type of activities.

As a consequence, the activities considered to be most creative and flexible are advertising, design and designer fashion, while the majority of the attitudes towards industries like arts and antiques markets and crafts is totally different.

This study has tried to show that/if youngsters make the distinction among the various creative industries from the perspective of creativity and flexibility implied, whether they establish a hierarchy with respect to their usefulness and to what degree. As expected, it is often considered that some industries are more creative or more flexible than others – the scores obtained stand as a proof. Or, all the industries under study are creative in their own way, without being able to say with certainty or justice that some are more creative than others. Also, one other purpose of this research was to find out what the creative industries are also considered to be cultural industries. Adjacently, the study reveals the fact that there is no gender discrimination regarding the creative potential, but confirms one sad truth: the violation of the intellectual property rights by the wide majority.

5. Conclusions

The main aim of this paper was to highlight the urgent need to start promoting and developing the creative industries. This need was first grasped by western economies and their experiences show nothing but good results at national level. By providing statistical information this paper emphasizes once again the discrepancies between the Romania's performance and the performance of other countries and is illustrative of the slow convergence process Romania is carrying out within the European Union.

A second aim of the paper was to provide some data about the status-quo of the Romanian creative industries. Such information is provided on a yearly basis in countries like Britain or Australia. Empirically built, this paper tries to round the picture of the Romanian creative industries.

The first conclusion is that the existing statistics at national level do not allow a fine and precise classification that outlines the creative industries exclusively as it is the case in Great Britain and Australia. Rather, activities in Romania are divided according to a broader classification. The second conclusion is that music and crafts are not to be found separately as such in aggregate national statistics, which makes it impossible to formulate any quantitative statements. The third conclusion is that software and video games, which are creative components of informatics, are not to be found separately in order to make a coherent analysis. Thus, several blooming creative activities in Romania cannot be separately analyzed due to the classification procedure and statistical reporting. This is why we have considered it useful to analyze one of the creative industries separately to highlight its traits.

The general conclusion regarding the creative economy and industries in Romania is that the structure of classification of the economic activities in Romania does not particularly focus on them. Moreover, from the statistics standpoint, it can be noticed that there has been a slight evolution and a meager importance for the creative industries, both from the consumers' side and from the business environment side. This is the conclusion if Romania's performance is to be compared to the performance of world and European leaders, such as Great Britain, Germany, France, Ireland, Italy or Australia.

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