

# **CREATIVE INDUSTRIES STRATEGY OF TARTU**

**Tartu City Government, Department of Culture**

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# Tartu loomemajanduse strateegia

Contents	2
Introduction	3
I Creative industries concepts and definitions	4
II Effects of creativity and creative industries to the city development	6
III Socio-economic overview of Tartu city and Tartu area	11
IV Overview of the surveys conducted in Tartu	16
V Analysis of the status of Tartu creative industries by categories	18
FINE ARTS	18
MUUSEUMID	20
APPLIED ART, HANDICRAFT AND FASHION DESIGN	22
ADVERTISING, IT, COMPUTER GAMES	25
MUSIC	26
FILM, PHOTOGRAPHY	28
THEATRE AND PERFORMANCE	31
FESTIVALS	34
LITERATURE	37
VI Proposals for improving creative industries by categories	39
VII Recommendations to Tartu City Government	44

## **Introduction**

Creative industries is one of the fastest-growing sectors in the world. According to the survey done by KEA European Affairs in 2006, the sector's turnover in European Union in 2003 was more than 654 billion euros, while the turnover of car industry was only 271 billion euros and IT producers' turnover 541 billion euros. The overall value increase of this sector during 1999-2003 was 19.7%, being 12.3% higher than the general economic growth.

In Estonia, the initiative for developing creative industries is held by Ministry of Culture, which has also ordered the first surveys in this field. In 2005, Estonian Conjuncture Institute and Estonian Institute for Future Studies finished together an Estonian creative industries mapping survey and proposals for developing the creative industries in the future.

The present document is based on those surveys and also takes account of the creative industries development experience of many other cities and states. Creative industries notion is approached with terminology used in the aforementioned surveys and practical terminology used in Estonia.

As the document was completed by request of Department of Culture at Tartu City Government in a very short time, it does not offer a complete overview of the present status and development possibilities of all fields of creative industries. The document focuses mainly on mapping of the state of fine arts and finding out the present needs of the sector.

The methodological framework is based on the Estonian creative industries survey conducted by Estonian Conjuncture Institute in order for the results to be comparable. To evaluate the state of Tartu creative industries, another set of field-oriented work-groups was formed. The result was a SWOT analysis evaluating creative industries' state and outlook in all art fields. Due to distinct characteristics of Tartu, some fields are somewhat different in relation to those surveyed by Estonian Conjuncture Institute. In Tartu, representatives from the following fields were met:

Fine arts

Photography and film making

Applied art, fashion design and handicraft

Music and concert establishments

Theatre and performing arts

Museums

Festivals

Design and computer games

The goal of the meetings was mapping the fields by analysing their strengths, weaknesses and needs for creative industries development. Especially, representatives of all fields were asked about the need for supportive services and incubational development centers.

The present document is divided into three parts. The first part introduces the notion of creative industries and currently used definitions of it. The second part gives a short interview of how culture and creativity in different European cities are affecting the local development. The third part describes choices that Amsterdam has made for developing creative industries.

Last part of the document also gives an overview of some of the creative industries fields in Tartu. It also shows the mapping results and presents possible developmental visions for the next few years. The overviews end with proposals for developing the Tartu creative industries.

The document was written by Külli Hansen, and the chapter about socio-economic analysis of the territory was written by Oü First Project.

## I Creative industries' concepts and definitions

The term *Creative industry* was first used in Great Britain in 1998 when United Kingdoms Department for Media, Culture and Sport created a strategy for developing their fields of interest and foresaw the advance of creative industries.

After this, many researchers have commented upon the notion, **Richard Florida** being one of the most widely quoted. He describes in his book *The Rise of the Creative Class* a creative class that includes creative professionals, entrepreneurs, scientists, researchers and high level consultants – people, who earn living by their creativity. Their main skill is to synthesize new applications for existing information and knowledge. Florida sees those people as the moving force of the 21st century.

In his book *The Flight of the Creative Class*, Florida speaks of global talent magnets. The magnets are creative cities where the real and true development of worlds economy takes place. These are open minded cities ready to accept the talents and offer them suitable environment.

Cultural heterogeneity is an important factor for such cities. Florida holds that important markers are the immigration index (showing the citizens born in the city vs. born somewhere else) and the mosaic index (the number and difference of countries the immigrants come from). Each of those indexes do not automatically guarantee the creative city title and the large number of immigrants with different levels of education is obviously also creating problems, but Florida maintains that the creative cities are attractive for talents only when the percentage of immigrants in the city is high enough.

**Irene Tinagli**, coauthor of Richard Florida, has also done research on creative cities. In her research *Understanding Knowledge Societies* she states that it is not possible to control or plan creativity. It is only possible to provide it with the right kind of environment. And, above all, this needs conditions that promote creativity. This means the need to invest in science and research, for many creative ideas rise from technological innovations.

Tinagli has proposed **the Theory of Three Ts**:

First T stands for **Talent**, second for **Technology** and third for **Tolerance**.

A society needs to be open to different ideas and cultural differences. A closed circuit tends to lose the power of innovation. If a city is habited by many enterprisers, creatives and students, it is still not good enough to create a true creative environment. International students, foreigners and minorities create the cultural heterogeneity that enriches and forces one to adapt to new circumstances.

**Allen J. Scott**, an American researcher, broadens the notion of creative industries by holding that it also describes the enterprises that are indirectly related to creative industries and serve them by *business to business* methods.

In summary, creative industries notion may be defined as follows:

*Creative industries include those economic and culture sectors that are creating products and services to enterprises, consumers or citizens. The meaning and symbolism of those products or services are expressed through various sign systems (writing, speaking, sound, form, design). The products or services are an outcome of individual or collective creativity, talent or experience and they are consumed because they carry a special meaning or they offer special experiences. The creative industries have also a important role in forming of the lifestyles and identities (including group identities) in the society.*

It is often hard to understand which phenomenon belong to creative industries and which don't, since creative industries is a very wide field positioned at the border between culture and economy. Where lies the border where creative industries end being creative and become just industries or

## Tartu loomemajanduse strateegia

economy? A theatre play, for example, begins with an idea envisioned by author, directed by the stage director and played by the actors. Costumes and decorations are created for the stage. After that, the play is advertised and marketed, tickets are sold, guests are received and offered food and drinks in the theatre hall. There are many economic fields that can not directly be categorized under the term “creative industries”, but are nevertheless strongly connected with creative industries and earn profit by serving the creative industries sectors.

In Holland, creative industries are divided into three main divisions, helping to clarify borders between different fields:

- Fine arts, graphics and cultural heritage
- Media and entertainment
- Creative business service (business to business market)

Fields:	Fine arts and cultural heritage	Media and entertainment	Creative professional services
Funding	State support	Market	business to business market
Product	<ul style="list-style-type: none"> <li>- Small scale</li> <li>- Effort consuming</li> <li>- face-to-face</li> <li>- Individual</li> </ul>	<ul style="list-style-type: none"> <li>- Complex and large scale</li> <li>- Technology aimed at marketing and reproduction</li> <li>- Collective production</li> </ul>	<ul style="list-style-type: none"> <li>- Small and large scale</li> <li>- Labour (and sometimes capital-) intensive</li> <li>- Individual and collective production</li> <li>- Face-to-face</li> </ul>
Dominant ideology	<ul style="list-style-type: none"> <li>- Artistic</li> <li>- Authentic</li> <li>- Independent</li> <li>- Protected by copyright laws</li> <li>- Traditional</li> </ul>	<ul style="list-style-type: none"> <li>- Popular culture</li> <li>- Authentic and commercial</li> <li>-Market oriented</li> <li>- Protected by copyright laws, collective production</li> </ul>	<ul style="list-style-type: none"> <li>- Artistic and client orientated</li> <li>- Authentic, functional and commercial</li> <li>- Protected by copyright laws, collective production</li> </ul>
Subdivisions	<ul style="list-style-type: none"> <li>- Visual arts</li> <li>- Performing arts</li> <li>- Literature</li> <li>- Cultural heritage</li> <li>- Handicraft</li> </ul>	<ul style="list-style-type: none"> <li>- Media programs</li> <li>- Music industry</li> <li>- Film and video industry</li> <li>- Printing</li> <li>- Music theatres, theme parks, pop</li> </ul>	<ul style="list-style-type: none"> <li>-Design ( and fashion)</li> <li>- Advertising and marketing</li> <li>- Architecture</li> </ul>

		concerts	
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Different countries use several notions that are more or less related to creative industries:

Cultural industry, cultural economy, creative industries, creative economy, copyright industry, content industry, media industry, experience economy, knowledge economy

None of them describe exactly the one used in Estonia.

The present document views creative industries and all related terminology as defined in the research “Estonian creative industries’ mapping survey and proposals for developing the creative industries in the future” conducted by Estonian Conjunction Institute and Estonian Institute for Future Studies in 2005

Creative industries are defined as follows in Estonia:

**Creative industries is an economic sector that is based on individual and collective creativity, skills and talents and is able to create welfare and employment through creation and use of intellectual properties.**

**In Estonia, the following fields are held to be part of the creative industries sector:**

**Architecture, audiovisual art (including film and radio), design, performing arts, entertainment IT, publishing (including journalism), fine arts, museums, music, advertising, handicraft and cultural tourism.**

## **II The effects of creativity and creative industries on the economic development of cities**

The main change that has taken place in the economic and cultural policies of European cities is the rising awareness of the fact that the effect and meaning of culture are more important than previously thought and that their values has been previously misjudged.

**Culture needs to be viewed as a growing economic value instead of as a money consuming luxury that can be afforded only during the periods of economic flourishing.**

Europe understands that creativity is the key issue of present day economy. Knowledge based economy and creative ideas are the primary foundation for generating innovativeness and large scale economic growth.

- **Creative cities**

The creative cities theory of Florida proposes that successful cities are those attractive to innovative ideas. In the future innovativeness is even more important and there is an even greater need for people who are able to create new ideas, see further than the boundaries of their fields, and able to cooperate with other fields, utilising their experiences. These people often happen to be researchers, scientists and artists – the enterprisers and creatives working in the so called knowledge based economy sector.

Florida points out the criteria that a city needs to satisfy for attracting such people. Cultural heterogeneity, tolerance and rich cultural environment are the factors that matter to those people. The service show that creative cities have often a significant number of immigrants originating from very different countries. The creative cities have also a larger number of minorities

Tartu loomemajanduse strateegia

(gays, ethnic minorities) and the communities tolerate their differences. Rich cultural environment where different groups of people have been given opportunities to practice their culture and maintain their identity is also equally important. Such cities and environments often attract also innovation-oriented global companies. Such companies open their branch offices in creative cities where they have possibilities to work innovatively and involve people from various fields.

While every city cannot be a creative city like New York, Singapore or Amsterdam, in Florida's terms, they still have possibilities for developing their creative potential.

The survey „*Culture, Creative Industries and Urban Regeneration* ”conducted by URBACT (*Network on cultural activities, creative industries and urban regeneration*) shows that cities choose different paths to develop their creative industries. Some of them create strategical documents on the city government level, in some countries this is done through state proposed priorities and some cities create voluntary networks as collective agreements. In each case the experience shows that it is important to involve maximum number of politicians and other interested parties. If this is not initiated or successful, a strategy may be never carried out and it's priority in the political level will not be recognized nor funded.

Amsterdam, for example, finished it's vision for cultural development until year 2015 already in 2003 and it's creation involved many different stakeholders. The vision itself is relatively abstract and declaratory and does not contain a plan of action. Amsterdam has not been endorsed on the political level as it is presumed that priorities will change in such a long period of time. The plan of action is created according to the vision and carried out by specific organisations and institutions. Each one of them is responsible for plans of action in specific fields and are usually also funded to carry out their activities and follow their priorities.

In Netherlands the state is rather a statutory and a controlling institution rather than an independent and directing unit. When state or a city recognizes a problem, it investigates this and creates a vision of the state of affairs to be reached. The task of carrying out the respective measures is given to funds, cities and institutions as the latter also contain the professionals of respective fields. If the state notices that a field needs more attention, it creates additional funds and organisations.

- **The development of creative industries in cities.**

All cities recognize the importance of their image. As culture is an important factor in the shaping of this image, cities wish to do something for developing it. Some favourite techniques have emerged in Europe that cities use to enhance their cultural image.

- 1. Festivals**

Many cities wish that their festivals would act as magnets bringing fame and fortune. Unfortunately, many tourism-oriented festivals lack cultural values and the city's image is enhanced much more effectively by a culture festival (for example, the Avignon theatre festival) than, for example, a beer festival (The Oktoberfest in Germany).

- 2. Culture districts**

Cultural districts are usually located in the old town or a specific part of the city. Artists and small enterprisers are often gathered into these areas. According to experience of the authors of this document, the culture part in them is often rather superficial. The Dublin Temple Bar and Amsterdam city center are both full of pubs and small shops and do not present the image of a culture district. It is rather an eclectic environment liked by many creatives, and an area where they are able to live in and work in. The district is not focused on developing high culture and usually such districts do not have theatres or museums held important on the national level. The districts may however contain alternative performance locations, clubs etc.

### 3. Culture clusters, incubators and supportive environments.

Clusters are usually defined as a geographic concentrations of companies and institutions operating in the same field – in this case, operating in creative industries. Clusters create a concentrated critical mass that gathers the specific experience of their field and facilitates it's economic success. Clusters aren't located only in factories, the term carries a much broader meaning. The creating of clusters is an important task for all cities that aim to develop their creative industries.

- **Culture factories**

The use of abandoned factory buildings is popular in old industrial cities and industrial districts of larger cities. The clusters however are not located too far from city centres, and often reside at the borders of the old town. Such factory buildings are usually filled with all types of culture, and dance clubs, theatres, bands, culture enterprises, culture experts and various organisations are using this culture or offering related services (media companies, embassies, catering services, museums etc). A well-known example of this is the Helsinki Cable Factory. Culture factories often contain space that is rented out for large events, fairs, conferences and culture projects. Many culture factories organize their own festivals, feature days or nights.

- **Use of old building complexes as culture clusters and district centres.**

There are clusters without industrial origins. For example, The Berlin UFA centre is located in small suburban buildings and has a relatively large territory with gardens and flowerbeds. It acts as the cultural centre of the district, offering locals a wide range of services ranging from various courses (yoga, fine arts, dancing, gymnastics, children classes etc) to festivals and night discos. The buildings in the territory are divided thematically so that the cinema or disco does not interfere yoga courses or children classes. UFA centre also own small eco-plots and an eco-café offering locally produced products. The centre creates it's own energy through windmills and operates by the principle of sustainable development. It is not an ecovillage as it is open only during daytime or nightly events.

- **Incubators**

The Amsterdam project **Broedplaats** envisages building of centres where young artists can rent studio space. They are usually created with intention of supporting young creatives and can be used by young artists with favourable renting prices for 5-10 years. After that they need to make space for new young artists.

- **Other thematic obligations**

There are also other similar themed culture establishments that share a territory and are working by the cluster principle. **Amsterdam Museum Square**, for example, is also called a cluster, as the most important museums of the city are intentionally positioned there. Their surroundings – parks, recreational grounds and gardens – serve the interests of the museums and host the outdoor events, museum nights and other thematic events.

Rotterdam has established a goal to locate all enterprises dealing with media and new technologies into the same district. For this, special buildings are designed for IT companies and older buildings in the vicinity are also restored accordingly. A hotel offering the best IT services and a thematic cafeteria will be also built into this district. All available space will be rented to enterprises and the whole complex will be managed by an office with only a few employees.

#### 4. Fine arts as part of the creative industries

When looking at various documents, it seems that fine arts are often not reviewed separately nor taken as part of the creative industries. It is more popular to refer to design and other divisions of creative industries. Many documents especially emphasize IT and new media, recommending to focus on the creation of computer games and various other fields utilizing technological advancements.

Fine arts are mainly discussed when the topic is the need to increase management or financial skills in national institutions. Many cities admit that large institutions being dependent of single funding institution is a problem. Amsterdam's solution has been the creating of numeral funds where companies may request support from to finance their international or more expensive projects. Existing legislation provides that all institutions, but especially performance establishments, are obliged to earn their own income and in some fields, even the income's percentage relative to the turnover is provided.

But it is also understood that there are institutions necessary for the city, acting as symbols. It is held that supporting and developing them is in the interest of the nation and in such a case it is important to develop them to compete in the international market. The opportunities of exporting high-value culture and advertising the whole country are to be supported. Large museums should be able to organise visiting exhibitions that also advertise the country and help in creating the city's image. National theatres should be able to attract visitors from neighbouring countries. High culture in this context works as a marketing project, creating positive image to the city and the state. The Netherlands understand that much more money should be directed to cultural exchange projects and increasing the mobility of creatives and that it needs also to be financed from the budgets of other ministries.

**Philanthropy** is another topic that the Netherlands have recently been focused on. As fine arts need support and can never function through ticket sales, it is important to find other means for financing them.

The Netherlands have many ministries working on creating supportive systems for philanthropy and culture. The Department of Justice is looking for opportunities to change the legislation in order to make supporting culture easier both for enterprisers and private persons.

**Copyright** law is another topic which shows increasing importance. Innovativeness and creativity are not valued highly enough at the moment because people are not used to measure it in terms of money. Many creatives are not used to assess their work in this sense and do not receive profits from what they should have rights to. At the same time, industries are not utilising the potential of creatives when designing or creating new products. Many industrial enterprisers do not use professional designers. But the statistics show that enterprisers or economic sectors that invest into design, innovativeness and creativity are more successful.

**As a conclusion**, it can be clearly seen that although fine arts and large culture establishments need to be supported also in the future, Europe shows tendency of requiring such institutions to find additional financiers. The number of private funders, funds and sponsors is increasing. In addition to the regular actions, state funded culture establishments often create smaller business associations or nonprofit institutions that carry out one-time projects. For example, many national museums in Amsterdam have created legal persons that produce international exhibition projects or organise events. Even if the national institutions do not become profit-creating enterprises, there is a tendency that it hosts a project organisation that is self-financing or even generates profit.

#### 5. Creative industries training and development of entrepreneurship

Tartu loomemajanduse strateegia

Several cities admit that creatives do not have sufficient experience nor skills to start their own enterprise.

Experience from England shows that even when artists are offered a chance to receive consultation by business advisers, the creatives do not use this opportunity. The companies created for supporting businesses and entrepreneurship do not usually know how to support creatives nor understand the viewpoint or situation of the creatives. In turn, Creatives usually do not receive enough support from advisers specialised in entrepreneurship.

Because of this, many cities have created special systems aimed at increasing creatives' knowledge of entrepreneurship and economy.

Some cities have chosen specific preferred fields that receive support or financing more often than others. For example in San Sebastian, the city supports young people who wish to work in audiovisual industries. The city is also supporting film festivals and film industries, holding the audiovisual sector as one of their priorities.

Many cities support young people who begin their own businesses (for example Amsterdam, Gijon, Birmingham) and have created special funds and programs for this. Valencia city in Slovenia has created special funding for young people who have studied abroad and wish to return to their home city. Several European cities have created grants and mentorship systems and established centres for tutoring creatives.

Kunstenaars & CO in Amsterdam is just the kind of centre that has the task of consulting or teaching creatives about entrepreneurship. It is created by the city and the state and its programmes and training projects are also funded by the state.

Existing legislation in the Netherlands provides that young creatives who have not entered the labour market, receive free tutoring or training through this organisation. During four years, they may take part of certain courses which grant them a professional certificate when finished. They are consulted when wishing to create their own enterprise. But Kunstenaars & CO is not organising art courses – rather, it teaches specific knowledge and business skills (negotiating with galleries, producers or printing houses, creating a portfolio, writing a CV etc).

In addition to the regular courses and trainings, Kunstenaars & CO also connects artists with enterprises, bringing together the business and creative sectors. Artists there have created business activity plans, designed buildings, organised events and helped enterprises to solve problems in creative and innovative ways. All such projects are financed by grants (Leonardo, Sokrates), national supports or by the enterpriser itself.

To develop entrepreneurship, several mentorship programmes have also been created. They enable the creatives to receive advice from the people who they hold as rolemodels. In other cases, the creatives are appointed an adviser who has completed the mentorship program and helps the creative to develop their enterprises.

### **III Socioeconomic overview of Tartu city and region**

The purpose of the socioeconomic overview is to map the different socioeconomic fields in Tartu. The following fields were analysed: (higher) education, enterprising and its current supportive organisations, employment and tourism. The following gives abstract explanations of the effect that these fields have on developing creative industries.

**Education** in the general sense and **higher education** in a specific sense are the defining factors of the number of people active in creative industries. At the same time one should recognise that there is a considerable number of people without professional skills active in the creative sector. The state of affairs in **enterprising**, **employment** figures and future prospects are significant factors

## Tartu loomemajanduse strateegia

determining the success of Tartu being the location for creative industries development. Positive environment for enterprising creates the conditions for rise of new enterprises and development of cooperativeness. The availability of people looking for jobs is in turn an important condition for creative industries. Presence and functionality of **supportive organisations** dealing with entrepreneurship are factors affecting the simplicity and length of the starting period of new creative industries enterprises. **Tourism** and **cultural tourism** create the conditions for direct sales of creative industries products and services. Tourism does not affect all fields of culture industries, it is most important only those offering the products or services to the end consumer. The general interest in cultural values by the local population is also held important.

The descriptive part of the document lists the important positive and negative factors and relative characteristics affecting the development of creative industries. These factors are referred to and discussed in more detail in later parts of the document. Concerning socioeconomic data, the current chapter focuses mainly on information relevant to the development of creative industries and does not provide much general statistics or other less relevant information.

### Population and employment

Tartu had 98.214 registered citizens in the end of the year 2006. The actual number of citizens was significantly larger because not all people living in Tartu are registered. The population is also considerably affected by the time of the year because of the presence of high school and university students. The people living in nearby regions but working in Tartu play also a certain role. The most important immigration in 2006 came from Tartu County. By the end of 2006, there were over 10.000 more females than males in the city. Female age in population graphs shows no significant differences, but for male age, the graphs show that most people are aged 25-29 and after these ages, the number of males is at a stable decrease. The district with largest population is Annelinn with its 28.000 citizens. Approximately 70% of citizens of Tartu are Estonians and 15% are Russians.

In recent years, the number of employed people in Tartu has been over 40.000. In 2006, the gross wage in most of the economic sectors of Tartu was a little below Estonian average, but the difference were marginal in most cases. According to the Department of Tartu of Estonian Labour Market Board, Tartu had 1556 unemployed persons. Most of the unemployed looked for work as unskilled labourers, while most of the employers searched for skilled workers or craftsmen. According to Statistics Estonia, the unemployment rate in Southern Estonia in the fourth quarter was 4.5% , which is considered a positive figure. During the same period, Southern Estonia's sectorial distribution of workforce was as follows: primary sector 8.5%, secondary sector 31.6% and tertiary sector 59.9%. Tartu County stands out because of a significant percentage of people with higher education in the labour market (24.7% in Tartu County, 18.5% in Estonia). According to the Estonian Institute for Future Studies, the people in creative industries account for 3% of total employed in Tartu. This gives an approximate figure of 1200-1300 persons working in the creative industries in Tartu.

#### Important aspects:

1. A significant part of the Tartu work force is aged 25-29, which is the most promising age group in terms of starting an enterprise. Those people often have professional experiences and this is one of the prerequisites for starting an enterprise.
2. Unemployment rate in Tartu is low and this had a two-sided effect on the creative industries. Low unemployment is good for employees, as there are many work offers and good salaries. This however does not motivate people to start enterprises. At the same time, low unemployment rate refers to a general good state of economy that makes the starting of enterprises easier, mainly due to favourable market conditions.
3. Tartu has less job offers than there are people seeking for, but a significant part of the unemployed people are looking for unskilled work. This could mean that the unemployed

## Tartu loomemajanduse strateegia

people are not the ones with higher education and in the creative sector. At the same time the need for skilled workers makes the office- or other salaried employment very attractive. As a result, it is often easier for creatives to accept the office employment and engage in creative work during their free time. This means that there is a need to also focus on fields where it is hard for creatives to find salaried work.

4. Many people are working or studying in Tartu without being registered citizens. Thus the possible number of people who could engage in entrepreneurship is considerably larger than one could predict from the official number of citizens.
5. The level of workers with higher education is higher than the Estonian average, which is a strong factor facilitating entrepreneurship.
6. There is already a considerable number of people working in the field of creative industries, demonstrating that creative industries in Tartu have potential, and also creating economic competition..

## Educational environment

The unique property of Tartu is its educational environment – an important factor in connection with establishing of a creative industries incubator. Education in creative fields does not only concern universities or colleges, but also to the preceding educational levels. Noteworthy educational establishments of the latter category include Tartu Children's Art School (260 students), I and II Tartu Music Schools (325 and 210 students, respectively), Tartu Vocational Educational Centre, H. Eller Tartu Music School (1309 students), and Tartu Art School (320 students). Some high schools are also strongly focused on creative fields – Tartu Karlova Gymnasium (music) and Art Gymnasium (design and painting). In addition to those, the city has also several private schools supported by the city – Vanemuise Dance and Ballet School, Arsis School of Bells etc. Although the teaching of creative arts before higher education is remarkable, the current document does not focus on it in greater detail, as this education takes place as an addition to general education and does not aim to specialise or grant professional work opportunities. In any case, it remains clear that the pre-higher educational institutions unlock and broaden the creative potential of young creatives.

Tartu hosts the following national institutions of higher education: University of Tartu, Estonian University of Life Sciences, Tartu Branch of Estonian Academy of Music and Theatre, Tartu Aviation College, Tartu Art College, Tartu Academy of Theology, Tartu School of Health Care, Estonian National Defence College, Baltic Defence College, Tartu Branch of Tallinn University of Technology. In addition, Tartu has many private institutions of higher and complementary education institutions, such as the Tartu Folk High School.

Tartu Art School deserves a special mention. It offers the courses of furniture and restoration, painting and restoration of paintings, sculpture, photography, textile, leather design and restoration, media and advertising. University of Tartu and Estonian University of Life Sciences also offer various creative courses.

In academic year 2006/2007, Tartu Art School had 300 students receiving professional higher education and a half of them were from Tartu County. One third of Tartu Art School professional higher education consists of practical work and the school is constantly improving the workshops, laboratories and studios in order to for these to qualify as modern study/experimental production environments. Working together with the commercial sector and various employers, the art school offers students additional chances to conduct professional practice in work environment. Due to active cooperation with various companies, museums, professional unions and educational institutions, students are given opportunities to take part of study trips, seminars and lectures in addition to the regular school courses.

## Tartu loomemajanduse strateegia

### Important aspects:

- There are various possibilities to study in creative fields already before entering an institution of higher education and young creatives entering the university might already possess motivation and development to start their own enterprise – especially if supported with additional knowledge of practical economics.
- Being an entrepreneur without any practical knowledge is difficult because of the increased risk of making financial miscalculations.
- Many creative fields curricula lack education concerning economy or teach it with uncertain quality, making the understanding of entrepreneurship difficult. This can be compensated with consultation and additional training programmes that would take place in the incubator or mediated by it. This possibility is also better than forcing economics into the study plan, as there will always be students who do want to work as entrepreneurs.
- Students of creative fields make up a relatively small percentage of the total number of students in Tartu, making it possible to promote enterprising through individual consultation.

## **Tourism and cultural tourism**

Tartu is an important destination for domestic and international tourism. Tourism in general has shown a steady increase during the recent years. Tartu is hosting only 3% of the international tourists when measured by the data received from accommodation establishments. The same data for domestic tourism puts Tartu in similarly marginal position, showing that using this kind of data for evaluating tourism is not the best choice. Cultural tourists of Tartu (and especially domestic tourists) often use other possibilities than the registered accommodation establishments. The Tartu Tourism Development Plan 2008-2013 mentions Finland, Germany, Latvia, Sweden, Russia and Norway as primary sources of international tourists in Tartu.

Main factors facilitating tourism have been local sights of interest, different culture- and entertainment events, and also academic events (academic conferences etc.). In recent past, Tartu has begun to systematically host various culture events - these could provide a suitable environment for selling products of creative industries. The events comprise largely of various large exhibitions and fairs. Most important site for exhibitions and fairs have been the Tartu Fairs centre and city centre (including town square).

Tourism creates good opportunities for marketing products with small production runs – something very characteristic to production of creative industries. Domestic tourism depends on certain traditional events with a specific image and organising of those events has become a norm.

### Important aspects:

- While tourism helps to market the production of creative industries, it remains very focused on specific products and services and creative industries should not be tied to or dependent of tourism.
- Tourism and cultural tourism should have a supportive role for creative industries - culture export and export of creative industries products should be considered more important.
- Increasing the attractiveness of Tartu city space holds an important opportunity for creatives to use their creative skills.

## **Entrepreneurship**

Entrepreneurship in Tartu is lively and active. Statistically, most of enterprises (85% in 2006) have less than 10 employees. Tartu enterprises made up 7.3% of all Estonian enterprises. There were 7340 enterprises in the end of 2006 (1 for every 20 citizens), of which more than three quarters were private limited companies. Main areas of activity were wholesale- and retail selling (2444

## Tartu loomemajanduse strateegia

enterprises); real estate, renting and business services (1911 enterprises); processing industries (640 enterprises), construction (558 enterprises); transporting, warehousing and communication (829 enterprises). There were considerably less enterprises operating in of other fields. At the same time, the number of enterprises is not a good indicator for discerning the sectorial preference of a sector as many of the enterprises are only registered as operating in a certain field and not active. The following table shows the ten largest employers of which most are manufacturing enterprises.

Enterprise	Number of employees
AS Falck Lõuna-Eesti	544
AS Tarkon	531
AS A-Selver	458
AS Tarmeko	431
TÜ Tartu Tarbijate Kooperatiiv	417
AS Kodumajatehase	414
AS A. Le Coq Tartu Õlletehas	390
AS Ilves-Extra	353
AS Sangar	339
AS Elektriteenused	324

In addition, it is also noteworthy that a very large part of citizens of Tartu work in the public sector.

Important aspects:

- Entrepreneurship in Tartu is statistically similar to Estonian average, meaning there is space for development.
- Creative industries entrepreneurs might have a good chance to cooperate with enterprises that have established their position on the market. For example, at least half of the 10 largest employers need various high quality design works – something that the creative industries can offer.

### Support organisations for entrepreneurship

Tartu has several business support organisations that could be utilised as partners of the creative industries incubator. **SA Tartu Ärinõuandla** offers various services both to starting and established businesses, but also to NPOs. The company's main services are consultation, including consultation about state support programs (including those of Enterprise Estonia). **SA Tartu Teaduspark** (Tartu Science Park) offers similar consultations, but it is more focused to innovative and science-intensive enterprises. The science park has created an incubation center that offers qualifying enterprises favourable terms for renting space. Many representative offices of various European Union support organisations (EAS, Innove, Archimedes, PRIA) are also located in Tartu.

Centre for Entrepreneurship of University of Tartu engages in various activities, one being the development of cooperation between Tartu and Southern-Estonian region to promote entrepreneurship. The centre has also created a special programme for starting a business, called **Ettevõtluskodu** (Entrepreneurship home). Students may complete certain courses of their curriculum through this programme, and the trainers of Entrepreneurship home are also coordinating and instructing their practice work in enterprises.

Through the Tartu Department of Estonian Labour Market Board, one can receive support for starting a business. The support for starting a business is monetary aid to an unemployed person (at

Tartu loomemajanduse strateegia

the moment, up to 20000 kroons), aimed to motivate the unemployed and to support starting of businesses.

People active in creative fields may request support from Cultural Endowment of Tartu, Department of Culture of Tartu City Government, Gambling Tax Board and various other organisations. Creative industries has therefore good opportunities to request support from both cultural and economic funds and support organisations - the current entrepreneurship development plan of Tartu also stresses the importance of supporting creative industries.

Important aspects:

- Tartu has many support systems for creative industries, offering both financial aid and consultation.
- Creative industries can request support both for cultural and economic aims, giving it an advantage over enterprises in other fields.

#### **IV Overview of the surveys**

An independent research company Turu-Uuringute As has conducted a mapping of Tartu creative industries and interviewed final grade students, alumnae and teachers of H. Eller Tartu Music School and Tartu Art School on the request of Tartu City Government. While the mapping was aimed at clarifying the needs of creative industries enterprises, the interviews were carried out to find out the potential these schools might have in development of creative industries.

School interviews showed clearly that students are ready to improve their knowledge of creative industries and ready to take part of the activities of creative industries centres.

The main results of the mapping:

- Most of the creative industries enterprises in Tartu are either companies<sup>1</sup> (61% of the sample) or non-profit associations<sup>2</sup> (NPAs) (39% of the sample). Comparing to the total sample, companies are somewhat overrepresented and NPAs underrepresented. The analysis is based on comparing companies and NPAs in order to avoid inaccurate generalisations,
- Most of the creative industries organisations (41%) in Tartu are rather young (1-5 years). 21% of the organisations have been on the market for 6-10 years and 27% for more than 10 years.
- Most of the NPAs (40%) did not have a turnover. 55% of the companies had a turnover less than 1 million kroons in 2006 and 24% of the companies had a turnover larger than 1 million kroons.
- Most of the creative industries enterprises in Tartu pay salaries to 1-5 employees (55% of companies and 30% of NPAs. 44% of NPAs do not pay salaries at all.
- 20% of PLCs and 62% of NPAs employ volunteers. The average number of volunteers is 1-5, as only 31% of NPAs and 4% of companies employ more than 6 volunteers.
- The average age of employees in creative industries is under 40 (58% of companies and 55% of NPAs)

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<sup>1</sup> The term “company” includes private and public limited companies, general partnerships and limited partnerships.

<sup>2</sup> The notion “non-profit associations” (or NPAs) in the present report includes non-profit associations, foundations, local government’s institutions and state level institutions.

## Tartu loomemajanduse strateegia

- Most common fields of companies were design (38%), architecture (29%) events & festivals and event management (22%). Main fields of NPAs were recreational activities (72%), events & festivals and event management (64%) and performing arts (20%).
- While most of the companies produce / create (48%) or manufacture / reproduce (33%), most of NPAs train / teach (65%) or organize / present / intermediate (48%).
- 89% of companies and 83% of NPAs cooperate with other enterprises / self-employed people in their field. Most of the partners come from Tartu or other parts of Estonia.
- 48% of companies and 52% of NPAs cooperate with enterprises or self-employed people from some other field. While companies cooperate with creative industries fields of design (41%), advertising (37%) and architecture (32%), NPAs partnerships are usually born in the fields of events / festivals / event management (61%), recreational activities (69%) or music (33%).
- Companies reported that the most important qualities of business environment for them are: availability of qualified labour and good infrastructure, while NPAs added services and support granted by local government, target group proximity and quantity to the list. Tartu business environment for its safety, creative environment, culture & history and beautiful surroundings. The city earned the least points for the distance between cooperation partners and also the least points for infrastructure.
- The emphasized strengths of various organisations were qualified labour force, presence of a unique market niche and high-quality products and services.
- Financing problems, lack of ideas, misunderstandings between employees, problems emerging from the change of the board, flow of employees, poorly qualified labour and lack of space were mentioned as the primary problems within the organisations.
- Outside factors holding back the development of creative industries enterprises in Tartu were listed as: lack of working space, lack of support services, lack of financial support, the rising of prices, lack of investment possibilities, lack of cooperation partners, lack of qualified labour, lack of initiative from the municipality and small market size.
- Of all the support services, trainings were listed as the most necessary (listed by 42% of companies and 50% of NPAs), especially computer, finance, law, management and marketing related and professional training.

## **V Analysis of the state of creative industries in Tartu by categories**

### **VISUAL ART AND PAINTING**

The largest (visual) art centres in Tartu are Taru Art Museum and the circle of people connected with Tartu Art School and Tartu Art College. The role of Tartu Artist's Union importance has been on the decrease during the past years, and the union has lost its leading role both in organising exhibitions and standing for the rights of its members.

Tartu art life has greatly benefited from the creating of Department of Art in University of Tartu. Many of the department's young students have already become recognised and successful artists.

The Kursi School that has been active in Tartu for 20 years is probably one of the oldest regularly practicing schools in Estonia. Their exhibition traditions and mentorship activities have played an important role in introducing the creation of young Estonian authors to a wider audience. The general art audience in Tartu that used to be considerably larger years ago. Organising large-scale outdoor exhibitions has not been possible due to the lack of city's representative gallery. The present role of representative gallery has been take up by the gallery of Tartu Art Museum, but it is too small for organising many contemporary exhibitions. The real estate development company AS

## Tartu loomemajanduse strateegia

Linnaehitus has hosted an important exhibition and the temporary exhibition rooms of their building Tigutorn tower are suitable for the role of representative gallery, but the city is not interested in renting those rooms.

As copyright laws become an obstacle, visual art should use the *creative commons* model, that allows greater freedom in using original art.

As a rule, artists do not earn enough from their art and many artists in Tartu work as art teachers, carrying out creative work in their free time. An anonymous artists commented that the possibility to live off art requires having art galleries in United States, London and other places in Europe. Estonian art market is too small and does not provide enough buyers.

Tartu Artists Union has been trying to manage their two buildings and has been suffering because of internal problems for years. This has lowered the image of the union both for its members and the public.

### Strengths:

- Sound education on all levels (Tartu Childrens' Art School, Art Gymnasium, Tartu Art School, Tartu Art College, Pallas Art School, Department of Art in University of Tartu, Tartu Folk High School)
- High quality art library in Tartu Art School
- Strong legacy and tradition of the Pallas school
- Tartu Art museum
- Tartu Artists Union with its buildings and galleries
- Successful artists and Kursi school
- Small galleries and young enthusiastic gallerists
- Successful art shops
- A.Vabbe, A. Starkopf and AS Linnaehitus art awards
- Tartu Art Month
- Art sponsors and supporters

### Weaknesses:

- Lack of city gallery
- Tartu Artists Union does not support nor protect the rights of its members
- Artists do not survive only by selling their art
- Artists do not have social guarantees
- The public do not have an overview of the artists and buyers cant find them
- There is a lack of support from the city
- The use of Tartu Artists Union buildings is unpractical and economically unsound
- Artists do not know how to manage creative industries
- Artists have grown up in an environment telling that art is sacred and selling is blasphemy

### Possibilities for development:

- Greater cooperation between artists and various organisations
- Opportunities to exhibit art in public buildings
- Stipends for visiting and taking parts of international exhibitions and professional education
- Turning renting spaces with lower prices into studios
- Entrepreneurship training

### Risks:

## Tartu loomemajanduse strateegia

- Artists leaving Tartu
- The public is further disengaged from art
- Artists feel themselves as unworthy

### Needs:

Artists of Tartu need social security and guarantees. They also need space for exhibiting their works- there is an urgent need for a city gallery. At the moment, the city doesn't even have space for exhibiting the art school graduates' diploma works. In addition, the public of Tartu should be shown contemporary art – the exhibition possibilities for this are restricted to the halls of Tartu Art Museum. Tartu Art School needs also rooms to help sell the diploma works of the graduates.

Tartu could have an art-related information centre. It could function as a databank for sharing information about artists, galleries and exhibition areas, oriented towards the audience. The centre could also have a function for artists, offering information about foreign art exhibitions and fairs and also mediating international contacts. The information centre could also mediate artist's creative services to clients.

- Art information centre
- A shop for selling art school graduates' diploma works
- Studio spaces and social guarantees to artists
- Creativity stipends
- Art to public buildings, the 1% law
- Free semester to art teachers for professional training
- More information about copyright laws and protection
- Investment supports needed for renovation of several buildings

### Development prognosis for the next 3-5 years:

- The number of young people with art education is growing and they need opportunities for professional work
- The number of youth art groups will increase
- Rising need for international contacts and joint events
- Rising need for knowledge concerning entrepreneurship and financing
- Artists will cooperate more with other fields
- Young talents leave Tartu

## MUSEUMS

Tartu has over 20 museums that belong to various parties: to the state (Estonian National Museum, Estonian Literary Museum, Estonian Postal Museum, Estonian Sports Museum, Tartu Art Museum), to the city (Tartu City museum with its branches, Toy museum), and to the universities and science institutions (various museums belonging to University of Tartu, and K. E. Von Baer House Museum, for example) or private owners (Beer Museum belonging to A. Le Coq brewery). Such diversity of ownerships is enriching (and many of the museums of University of Tartu emphasize scientific work above others) but also hinders creation of large projects that involve all museums (shared ticket systems, free visits etc) as Museums need to make sure their costs are covered.

A general problem for museums is the lack of opportunities for changing. While the museum workers think that the main exhibition should be changed after every 3-5 years, the financiers do not

## Tartu loomemajanduse strateegia

provide means for this. The museums are obliged to organise events that attract large numbers of visitors and increase ticket sales, but the financiers are not willing to increase the budgets of exhibition activities. This situation could create a dilemma between quantity and quality in organising exhibitions and also when choosing the museum shop products. Tartu museums have a general good image, and many museums have moved to new buildings, changed their main exhibition or renovated their rooms in the past 5 years. The museums have become more open, attractive and host more events and programmes aimed at a more diverse audience. Some museums have stayed the same for decades and their historical installations have become a sight in itself (Zoology Museum of University of Tartu).

The main sources of income for museums are ticket sales, renting of their rooms, organising events, and selling of products or publications. The main source of income are different for different museums. Estonian National Museum and the Toy Museum earn their income from selling publications and museum shop products, the Sport Museum offers paid exhibitions to organisations and Tartu Art Museum earns income by depositing art. A problem for several museums is the lack of suitable rooms for a museum shop. In case the shop exists, the selection of products is often very small and these problems need to be solved, by developing and supporting related projects, for example those promoting the creation of souvenirs and products based on authentic artefacts.

Several museums lack parking space and general traffic system or public transport are not favourable in terms of reaching the museums. Tartu lacks a space for museums to advertise themselves. Most of the museums lack marketing advisers, but their importance is starting to be recognised. For example the creation of marketing department to Estonian National Museum drastically increased the selling numbers of publications and museum shop souvenirs. Most of advertising is done through free media (newspaper articles and free advertising in national TV channel) as advertising through more expensive media channels is out of reach for museums. Shocking or scandalous exhibitions are the ones that draw more visitors (such as the exhibition of torture devices in Estonian Sports Museum).

### Strengths:

- Many different museums
- Most of museums in Tartu are located in central parts of the city and are easily accessible to pedestrians.
- Most of the museums have modern main exhibitions
- Most of the museums have rooms for hosting cultural events
- Professional employees
- Installations of older buildings have become historical values
- Museums of Tartu have a respected and positive image
- Opportunities to earn income by renting museum rooms, organising events and selling publications.
- Museums are starting to employ marketing and PR experts
- National television enables to advertise museums for free
- Most of the museums are members of pan-European museum organisation ICOM

### Weaknesses:

- Lack of parking space
- Tourists expect museums to change their exhibitions, but this is not possible due to low funding
- The funders expect museums to steadily increase their visitor numbers and self-financing
- Lack of space and bureaucracy hinder the creating of museum shops
- Museum shops have too small a selection of products

## Tartu loomemajanduse strateegia

- There are not enough opportunities for motivating the employees of museums
- Museums do not have enough employees with marketing skills
- Internet home pages of museums need constant upgrading and information there needs to be presented in different languages
- Obsolete ideas and clichés about museums are still alive because media reproduces them

## Possibilities for development:

- Development of museum shops
- Supporting enterprisers that produce souvenirs and products to museum shops
- A space for museum advertisement in Tartu city center
- Museums of Tartu should appear in TV during the Year of the Museum
- Newspaper insets for advertising museums
- marketing training for museum employees

## Risks:

- The general interest of museums decreases
- Opportunities to advertise museum events decreases and information does not reach the target groups
- Tourists take lesser interest in museums
- Motivation of museum employees decreases

## Needs:

A discussion concerning museums needing an incubator or supportive unit, it was agreed that the most important need for museums is a marketing advice. If possible, museums want to train their own employees instead of purchasing professional marketing services.

The museums need a shared multilingual advertisement leaflet that is on sale throughout the year. Museums' home pages need upgrading and translation into various languages.

Year 2009 is termed the Year of the Museum and this would benefit from a shared advertisement campaign comprising also of newspaper insets, advertisement in the fairs held in countries bordering Estonia (Riga and St. Petersburg), and also TV shows. Museum advertising could be combined with advertising the Tartu city.

Museums need also to cooperate with other fields (entrepreneurship, tourism etc) in Estonia and other countries. Museums are ready to participate in project-based and long-term networking to follow their goals:

- Carrying out children and hobby programmes (networking with craftsmen etc)
- Creating attractive souvenirs and tools used in museum programmes or work
- Organising events, concerts and plays aimed at families (networking with hobby schools, small enterprises etc)
- To offer entertainment packets (networking with housing, catering and culture

## Development prognosis for the next 3-5 years:

- Museums will have a larger part in organising culture events and festivals in Tartu, and these will gain popularity
- The educational programmes of museums will develop and gain popularity
- Museums will create more joint projects, events and exhibitions
- The number of projects funded by EU and cooperation with museums in other countries will increase

Tartu loomemajanduse strateegia

- Museums cooperate with other fields of culture and entrepreneurship to broaden their services, created joint service packages and increase the selection of products in museum shops

## **APPLIED ART, HANDICRAFT AND FASHION DESIGN**

Handicraft, applied art and fashion design related education is well developed in Tartu mainly due to Tartu Art College. The school is viewed as having a high status, international connections and general intellectual atmosphere and several of its graduates have successfully taken part of Estonian and international fashion design contests (Triinu Pungits, Kaire Kukk, Janika Terasmaa, Maru jt). Fashion design is also popular in Tartu because several high school students have been successful in Supernova Fashion Show, a popular and regularly held fashion designer contest in Estonia. There are also popular and highly motivational contests “Moeke” and festival “Mood, Performance. Tants” for secondary school students.

Tartu craftsmen are skilled and original and could sell their products internationally, if Tartu had professional culture managers with skills to organise this. Several artists reported needing a manager, who would help selling their art both internationally and in Estonia.

Young people are interested in applied art and fashion design and graduates want to continue education or work in the same field. One opportunity for young artists is working in the St. Anthony’s Guild and also renting its studio. For several years, Tartu Art College and St. Anthony’s Guild had an original incubation project, which enabled graduates of the school to rent the guild rooms with a favourable price. The school helped to pay the rent and the young artist working in the guild had an opportunity receive other guild benefits, such as shared costs for maintenance, advertising and marketing, bookkeeping and to take part of guild events.

One of artists being part of the incubation project was Triinu Pungits, who reported that working together with older professionals was very useful and helped her to develop more quickly. During the three years she was working in the guild, Pungits took part of several fashion design contests and became well-known. She left the guild after three years for a more private space.

Many young artists feel constrained by the guild acceptance conditions. The guild operates as a tourist attraction and requires its members to wear medieval clothing and be present at certain times – conditions not suitable for all young artists. At the same time, the guild functions as an effective center popularising applied art and artists in Tartu. Most of the guild workers have their regular clients and they receive most of their income by doing work ordered by their regular clients. The greatest weakness of applied art is the lack of clients with buying power in Tartu. Original art is often sold with its base price (product materials and artists working time), the idea is not charged as otherwise the product wouldn’t be bought.

Young artists state that selling art could cover their basic needs, but they wouldn’t be able to support their family with it. The more professional an artist becomes and the greater becomes his or her market, the greater will be the price of his or her art. For example, the collections required for taking part of some international contests could cost ten times the material and working time as the collections required to take part of contests in Estonia. The present grants (mainly from Cultural Endowments of Tartu and Estonia) do not allow artists to take part of international contests.

Strengths:

- Applied art, handicraft and fashion design is taught on different levels of education
- St. Anthony’s Guild operates as an applied art centre
- contest “Moeke” and festival “Mood, Performance. Tants”
- Successful young fashion design artists

## Tartu loomemajanduse strateegia

- Internationally know artists and professional teachers in Tartu Art College
- Many young and talented artists with international ambitions
- High skills of handicraft
- Local originality and hand made products
- Some clients find that buying fashion and handicraft is an investment
- University students consume fashion products

### Weaknesses:

- The consumers lack buying power
- Young artists do not have the money or resources to buy or rent tools needed for their creative work
- There is a lack of studios for beginning artists
- Original art is sold with its base price (product materials and artists working time), the idea is not charged as otherwise the product wouldn't be bought.
- There is no connection with international market
- There is a lack of managers
- Tartu does not have materials for producing fashion or other art products in bulk
- Media does not follow news of Tartu often enough

### Possibilities for development:

- Creating studios for young artists
- Free studios and use of tools for qualified artists to create textile and leather art
- Stipends or grants for international trips, making international contacts, taking part of fairs and internationally important field events, international education and for organising exhibitions.
- Creating an art and fashion design house to offer working space for young artists, coordinate fashion design with related fields of art (photography, graphic design, textile design, leather design), make international contacts and organise events, seminars, exhibitions and trainings.
- Greater advertising of original production runs and young artists
- Informing of and advertising young designers to entrepreneurs.

### Risks:

1. Young people leaving Tartu
2. Buying power of consumers decreases
3. Income from selling creative work is not enough to support a family, people choose to have children later or reduce their creative ambitions
4. Consumers cannot find the young artist and do not pay high enough prices for original products.

### Needs:

To support young fashion design and applied art artists, an environment needs to be created, one that draws young artist from various creative fields (photography, fine and applied arts, fashion design etc). For international export of applied art products to be more effective, there is a need to educate and motivate culture managers or respective marketing professionals.

Many applied art artists miss more expensive tools and therefore cannot create what they wish. There is a need for free studios equipped with tools and open for all interested people and St. Anthony's Guild wishes to create such a studio for leather and textile artists in a building at Lutsu street 3.

## Tartu loomemajanduse strateegia

- Stipends for international self-improvement, taking part of fairs, festivals and contests
- Free studios with opportunities to rent tools
- Training of culture managers
- Broadening the selling of applied art and supporting its export
- An possibility to rent private studios at a discount price
- Bringing together designers and producers

### Development prognosis for the next 3-5 years:

- number of young artists and art organizations/groups in Tartu increases
- Cooperation with other fields increases
- Many young people leave for Tallinn or to work abroad
- The need for entrepreneurial training increases
- The number of cooperating enterprises and designers increases

## **ADVERTISING, IT AND COMPUTER GAMES**

Tartu design and advertisement enterprises are relatively small and are mainly producing graphic design, doing preparation for printing, street advertisements, homepages and different design works. The enterprisers do not produce advertisements for TV or radio, because they lack the required skills and/or technology.

Tartu has several successful IT enterprises, including Playtech. The company employs around 300 creative people, of whom many have studied in University of Tartu. While it is one of the largest creative industries enterprises in Tartu, it does not take part of organising city events or festivals. Though the company supports city's culture events and helps to create national professional standards.

Several artists of Playtech have worked in the company for 5-6 years and it may be predicted that they start to look for new possibilities for creativity – move to work in Tallinn or start their own enterprises. Already a first designer group (called “Baas”) has emerged in Tartu, they rent a space in the centre of the city for private working space and hosting events.

The main problem identified in the field was the large number of artists in Tartu facilitating dilettantism or unprofessional ity. Many young people who have had some art education start to offer design services or creation of homepages for a very low price. This leads to a situation where mediocre art and design are abundant, making it hard for highly skilled designers to sell their work. Good designers leave to work in Tallinn, because it offers better salaries and possibilities for work.. The low buying power of customers of in Tartu means they cannot afford quality products, and advertisement agencies in Tartu need to focus on quantity rather than quality (or increasing quality), making them unable to offer products for clients seeking for high-quality products.

### Strengths:

- Very many possibilities of visual art education for all ages
- Students from different schools meet and exchange information
- Online gaming company Playtech
- Designers find work already before finishing their education
- Experienced employees of advertisement agencies are ready to work as mentors

### Weaknesses:

- Many artists or designers with unfinished or inadequate education are offering their services and lowering the general quality of the market

## Tartu loomemajanduse strateegia

- Tartu Art School and Tartu Art College do not have the design curricula
- Few employers that offer professional work to a good designer
- Low buying power of clients

### Possibilities for development:

- Favourable renting prices for young starting enterprises
- Funds to support networking between young artists
- Various marketing and other trainings
- Teaching of game design

### Risks:

- Young people leaving Tartu
- Enterprises created by young artists go bankrupt or are not viable

### Needs:

Fields of advertisement and design need to use the experience of the workers of Playtech to educate young artists. Creating computer games and teaching game-making could be supported by special grants or support schemes, or through other various projects. For example the Kultuuriaken web page („Culture Window”) could have a game room created by young people. Youth centers should also have studios for creating computer games.

There is a need for training of entrepreneurship financial planning and marketing. There is also a lack of programmers in advertising and design agencies.

- Studios, workshops and other environments for creating computer games
- Entrepreneurship training
- More programmers needed

### Development prognosis for the next 3-5 years:

- The number of young creatives starting their own business increases
- Young creatives seek possibilities for independent development and work

## **MUSIC**

In year 2007, Tartu hosted around 1300 concerts and 160 of them took place in December (meaning more than 5 concerts in a day). These statistics show that Tartu audience loves music. Tartu has many large institutions of education supported by the state or city (Vanemuise Theater and Concert Hall, H. Eller Tartu Music School) and also various children's music schools and private schools.

Because of various regular musical activities, the number of school choirs and students in choirs is constantly high.

There are many exclusive music festivals (Rainbowjazz, Mürtsub pill, Vanamuusikafestival, Mailaul, Maa ja Ilm), but music is an important part of almost all festivals.

Tartu has many professional musicians who work as performers and educators. Music is almost the only field of Tartu that does not lack active managers. A weakness is the homogeneity of musical education, as most of it values classical music - other genres and improvising should be more emphasized.

There are few very successful musicians and highly rated concerts regularly present the same of

## Tartu loomemajanduse strateegia

those few musicians. At the same time, the salaries of professional and successful musicians are not that high, meaning many of them leave to Tallinn or abroad. It is also practically impossible for them to appear in newspapers as media does usually not cover events in Tartu. A musician who wishes to stand out needs to work in Tallinn and take part of larger projects.

Most graduates of the music schools find work, but often not in their special field. Some instruments are taught every year, but need for them is not that high. For example an accordion teacher cannot find professional work since Southern-Estonian schools already have such teachers.

Producing music records is not profitable as Estonian market is too small and international marketing is not working. While Vanemuise Theatre and Concert Hall are contributing to the musical side of Tartu, they are also hindering smaller collectives or freelance music managers, as the latter ones cannot compete with large institutions funded by the state. Smaller concerts and festivals are often left unnoticed, do not receive enough attention from the media nor financing from the local government and are therefore not capable of development.

### Strengths:

- Vanemuise Theatre and Concert Hall operate as musical centres
- Many opportunities for musical education for all ages
- Many choirs and orchestras ( 9 brass bands)
- Organisations that organise regular music festivals, concerts and folk singing festivals
- Several places suitable for performing
- The city supports musical activities of children, students and senior citizens
- Managers are common in music industry

### Weaknesses:

- More improvising musicians needed
- homogeneity of musical education, improvising and arranging should be more emphasized
- salaries of professional and musicians are too low
- Young talented musicians leave Tartu and Estonia
- Estonian market is too small for producing records
- Buildings of music schools are not planned to be used for this purpose and their rooms are often not suitable
- Tartu lacks a space or community cultural centre meant for (folk) dancing
- Media coverage of Tartu is low
- Concert visits are not part of school programme because the ticket prices are too high
- Notes are very expensive

### Possibilities for development:

- Creating of new more attractive curricula
- Support programmes for financing study trips

### Risks:

- Musicians leaving Tartu
- Some musical events and festivals are discontinued

### Needs:

- Support funds for schools to make international contacts
- A stipend fund for musicians
- Training courses for writing projects
- Young people interested in becoming a manager should be taught writing contracts,

Tartu loomemajanduse strateegia

- budgets, and other financial skills (including investing)
- Musicians should be taught skills related to self employed entrepreneurship
- Study trips to international events and organisations

Development prognosis for the next 3-5 years:

- Young creatives seek possibilities for independent development and work

## FILM AND PHOTOGRAPHY

Film and photography are taught on a hobby level (in Anne Youth centre and Tartu Folk School) but also on professional and higher education level in Tartu Art School and Tartu Art College. The latter acts as an important base organisation in developing photography in Tartu. The art school has only blackbox in Tartu. Its lecturers, teachers and students have a strong influence on the general level of photo- and cinematography skills in Tartu. The school also offers several opportunities for continued or additional education in photography. The office of “Cheese” (the only photography magazine in Estonia) is also located in Tartu.

Several older and younger internationally known photographers are also working and living in Tartu. The photographers of Tartu are in contact with European photographers.

One of the main strengths of cinematography in Tartu is the fact that young people are very interested in filmmaking and the student film importance in the past few years has increased - films is more popular than photography exhibitions.

Tartu film festivals (Tudengifilm TARTUFF, PÖFF, Maailmafilm) are popular and enterprisers are also supporting film making. Young film makers have no problems using space of enterprises as filming sites and owners of such spaces are generally very supportive. Student film makers are connected and actively cooperating.

Amateur filming and photography equipment is cheaper, but professional equipment costs a lot and both creation of films and organising photography exhibitions are expensive. While there are relatively few film makers in Tartu and they are able to show their films in festivals (for example the Student Film festival) or film clubs, the photographers lack possibilities to exhibit their creation. There is no gallery specialised to photography in Tartu nor any known photo exhibitions/events. One participant of the survey reported that photography faded from media interest when the photo gallery Illegaard and regular biennial exhibition “Woman in photographic art” stopped its activities in the 80s.

The lecturers of Tartu Art School and Tartu Art College are internationally recognized and original. But photographers of Tartu need more international contacts and comparison, to avoid becoming secluded and single-school-oriented. For example, the successful photography magazine “Cheese” tends to be too Tartu Art College focused and sometimes becomes the schools almanac.

As the tradition of valuing photographs as art has faded in Tartu, selling them has become harder and photographers work mostly on a contractual basis. There are also problems with copyright laws- one of the photographers told that after uploading photographs to internet, one could discover them being used in newspapers or other media without being referred to, while source of the photo is labeled as a private collection, archive or internet.

Nonexistent media cover of photography in the is also a problem – photographers are unknown, and they are not written about.

Strengths:

### FILM

- Cinematography education in Anne Youth Centre
- Cinematography and animation courses in Tartu Art College
- Film festivals (TARTUFF, PÖFF, Tudengifilm, Maailmafilm jm)

## Tartu loomemajanduse strateegia

- Cinemas Athena and Ekraan
- Film makers cooperate

## PHOTOGRAPHY

- Photography courses in Tartu Art College
- Several internationally successful photographers
- Photography magazine CHEESE
- Several possibilities for further education

## Weaknesses:

### FILM

- further education of cinematography is not sufficient
- There is a lack of studio spaces
- Showing films is expensive because of the high renting prices of equipment and rooms
- Making films is expensive
- Film makers leave Tartu
- There are no possibilities to rent filming equipment in Tartu

## PHOTOGRAPHY

- It is hard to sell photos and most of the work is contracted
- Tartu advertising agencies practically not order/buy photos
- There is no city gallery to exhibit photos
- There is lack of possibilities to rent equipment
- Media coverage is low
- Organising exhibitions is expensive
- Too many dilettante photographers

## Possibilities for development:

### FILM

- Creating of a suitable loan system would allow young film makers to by needed equipment
- Developing and equipping present film making base draws young people towards film making
- Present young film making enthusiasts with experiences should be used in cinematography education and work with school or university students
- Anne Youth Centre film making equipment should be modernised and the scope of film making enlarged
- Film festivals and events need more support
- Stipend system increases independence of film makers
- Film festivals need more student films, to draw more international attention and help create (inter)national networks

## PHOTOGRAPHY

- Creating of a suitable loan or grant system would allow young photographers to by needed equipment
- Visiting fairs and festivals is needed to evaluate international competition level and motivate artists for self-improvement
- The Tartu annual photography exhibition stimulates photographers for self-improvement and facilitates audience to value photography even more

## Risks:

## Tartu loomemajanduse strateegia

### FILM

- Film makers leaving Tartu
- Too few opportunities for young creative people who are interest in film making
- Film making in Tartu stays at the amateur/hobby level

### PHOTOGRAPHY

- Audience alienates from photography art if there are no opportunities for exhibiting it
- Selling photography in Tartu becomes even harder
- Photographers focus on contracted work and do not exhibit their work
- Young photographers leave to Tallinn or Europe
- Young photographers become unmotivated and stop improving
- Creating photos is easy and the need to order photos from professional s disappears

#### Needs:

- A city gallery
- International photography exhibitions
- A loan system to buy photography equipment
- A film club with favourable renting prices of rooms and equipment
- International contacts and information networks
- Opportunities to receive practical experience working in an international team or with professional s
- Visits to exhibitions and festivals

#### Development prognosis for the next 3-5 years:

- Increasing number of young photography professional s with no possibilities in Tartu
- Popularity of photography and number of respective exhibitions or events increases
- Greater number of young film makers, but possibilities for film making is viewed as even less satisfactory
- More groups or circles of young independent creatives who wish to exhibit their work internationally
- More contracts for photographers from Tallinn
- The need for free photo studio with blackbox and white room increases

### THEATRE AND PERFORMING ARTS

Tartu is a fine place for hosting theatre festivals as it is sufficiently large and diverse, accepting and having audiences for very different plays and also sufficiently small for the festival not to remain unnoticed.

Several theatre halls and different small theatres are part of the unique values of the city. They are diverse and have their own audiences.

Vanemuise Theatre acts as a centre for the theatre life and is essential for all other theatres, that use or rent its equipment, technical staff or rooms. The main problems of theatres are lack of performing space and minimal possibilities to pay their employees.

Small theatres' need for space is more serious as most of them (Tartu Üliõpilastetaer, Vilde teater, Ida Tantsukool) lack a rehearsal hall, office spaces, and storage rooms. Vanemuise Theatre and Emajõe Suveteater lack storage and rehearsal rooms. The smaller building of Vanemuise Theatre needs renovating and modernisation of water, electricity and heating systems. Athena cinema hall does not suit for theatres as their stage is small but rent expensive. The hall does not have ascending

## Tartu loomemajanduse strateegia

positioning of chairs, making it suitable only for plays aimed at small audiences that generate low income. Athena also lacks storage rooms.

Paying employees is another problem and most of small theatres do not have managers. Vilde theatre needs two additional stage directors. IDA Dance School employs two teachers but manager works as a volunteer and without a salary. Vanemuise Theatre's main problem is inability to pay actors salaries that would meet the average earnings rate and they need to do additional work to support their families. This might lead to overworking and tiredness that do not have a good effect on actors' professional ity.

Theatres of Tartu would be internationally successful, but they don't have opportunities to perform abroad. Vanemuise Theatre has decided that performing abroad is possible once a year. Tartu Student Theatre is often invited to competitions but they have very limited possibilities to take part of these competitions. Students theatre would invite student theatres from other countries to perform in Tartu, but they lack financial means to do so.

There are also problems with advertising – the webpage Tartu Kultuuriaken is a good advertising channel but theatres also need to advertise themselves on the city streets but they have limited possibilities to do so. For example, it is not easy to place advertisements into city shopping centres, because the people who may allow this are in Tallinn and they need to be specifically “persuaded” for every separate advertisement as there is no regular contract. Even other media channels have too high advertisement prices and even 70% more favourable prices are too high for smaller theatres. Vanemuise Theatre financial director states that an advertisement that stands out in the newspaper costs ca 300'000 – and this is a lot more than small theatres could afford.

Theatres can earn their own income – for example, main sources of income for Vanemuise Theatre are ticket sales, renting of rooms, equipment and buses and also advertising. Vilde theatre is project-based and main income comes from tickets. IDA Dance School finances itself from tuition and capitation fees. SA Estonian Theatre Festival receives ca 25%-33% of their income from ticket sales and other income from state funds, endowments, grants, sponsorships and publishing activities.

### Strengths:

- Capacities: Vanemuise Theatre halls with 700 and 400 seats and a blackbox for 150-300 visitors; Athena theatre hall for 50 -150 people and a cinema hall, and smaller capacities at Emajõe Suveteater, Genialistide klubi, Üliõpilasmaja.
- Many good and interesting spaces for outdoor plays (churches, inner courtyards)
- All theatres (including hobby and student theatres) have skilled actors
- Vilde Theatre has a Russian Studio
- IDA Dance School and Vanemuise Dance and Ballet School are popular
- Vanemuise Theatre actors are invited to play also in other theatres
- Estonian Theatre Festival and its events such as “Draama” and other theatre festivals

### Weaknesses:

- Lack of rooms and spaces both for smaller and larger theatres
- The smaller building of Vanemuise Theatre needs renovating and modernisation of water, electricity and heating systems
- Renting equipment required by theatres is expensive
- Actors' salaries are lower than average
- Small theatres need managers and most of them don't employ one. Vilde theatre has a single stage director but needs three. IDA Dance School employs two teachers but their manager works without a salary. Estonian Theatre Festival has a manager but it is hard to pay her a suitable salary.
- Insufficient possibilities for inviting internationally known theatres and plays from other countries to perform in Tartu
- International communication is not sufficient

## Tartu loomemajanduse strateegia

- Insufficient possibilities to advertise theatres in Tartu city

### Possibilities for development:

- Creating an activity support system for smaller theatres
- Developing international contacts and taking part of competitions
- Training theatre managers

### Risks:

- Small theatres end their activities
- Audience receives too little information concerning theatres and their popularity drops
- Quality of theatres decrease

### Needs:

Theatres need new rooms, increased funding, and more advertising. The topic of creating “Tartu Wall of Culture” (a place for advertisements and information) has been around for years. Similarly, there have been talks of connecting the Culture Window directly with Tartu shopping centres. Such modern means for advertising are very important. Theatres wish to increase their international communication, for example, the IDA Dance School wishes to create an international childrens’ and ballet dancers festival in Tartu. Estonian theatre is so diverse that there is no need to bring in foreign experts, as their recommendations are often not suitable.

- Grants for international education
- Funds for smaller theatres that would cover salaries for managers and office space rent
- Better advertisement possibilities in public spaces
- Training courses to actors and other theatre employees
- A need for a stage with smaller rent

### Development prognosis for the next 3-5 years:

- Successful theatres and organisations become more successful and others less successful
- Many actors get tired of working in several places and wish to receive appropriate salary
- Ticket prices increase
- Renting prices of rooms and equipment increase making it even harder to small theatres to continue their work

## FESTIVALS

Two distinctive qualities of the festivals of Tartu are their content and originality. Almost all festivals ( Kunstikuu, Prima Vista, Mürtsub pill, Draama, Eclectica) have their own target groups and very devoted organisers. Most of the festivals in Tartu are very young (3-6 years) but have already gained stability and become popular. The largest festivals in Tartu are the Hansapäevad (“Hanseatic Days”) and Draama theatre festival. Several smaller festivals (Maailmafilm, RainbowJazz, IDA tantsufestival, Tartu Tudengipäevad) take place thanks to support and organising by larger cultural establishments. This has its positive sides but there is a risk that some funds and endowments do not wish to support the festival because it is already supported by the large establishments.

“The Syndrome of Tartu” is that funds regard events in Tartu as local while events in Tallinn are regarded as national. Most of the festivals have reached the stage where development requires additional funding. During the first years, most of the energy was spent on creating teams and an image, and now it should be spent on development. For example, most of the festivals need an active festival manager or organising team working throughout the year. Several festivals have

## Tartu loomemajanduse strateegia

created an NPA and hired one or several managers. Many ambitious festivals wish to become international and make long term plans, but the annual or project-based financing does not favour this.

Many festivals are held several times a year (Draama, Vanamuusikafestival) or are planning to become a linked chain of smaller festivals (Eclectica). Such changes are positive because the number of festivals held in Tartu has reached it's maximum and events are already competing for audience. Although the organisers try to position/separate them in time, most of the festivals still take place during early summer or autumn.

The largest problem of festivals is the constant change of their organisers. While the core organisers usually stay the same, others are constantly changing. Festivals are carried out by very many young people and volunteers inspired by the idea of the festival. Such events also educate young people as culture managers. Most of the festivals need constant funding to support their team of organisers with the exception of Tartu Student Days, which is exclusively organised by volunteers.

Enterprises in Tartu readily support Student Days events as they are popular and have an attractive target group. Other smaller festivals do not receive such support from businesses. One reason for this could also be the lack of skills of organisers to negotiate with enterprises. The businesses might also be just too far from culture and do not realise the long-term benefits of such partnerships.

Most of the festival directors in Tartu have self-educated themselves through practical work and festival directors also prefer to train their staff rather than hire expensive services from outside. Multifunctionality has it's limits and larger festivals usually need some professional services from outside their team.

Marketing the festivals of Tartu is difficult because their budgets are too small to afford advertising in traditional media channels. The budget analysis of several larger festivals and establishments of culture show that in order to stand out and reach the audience, an advertisement budget costs should be around 300 000 kroons. Most of the festivals receive up to or considerably less than 300 000 kroons from the city but the following festivals of 2008 have been granted more:

Eesti Kooriühing	V Põhja- ja Baltimaade Koorifestival	500 000
Tiigi Seltsimaja	Jõululinn Tartu 2008	300 000
Tiigi Seltsimaja	III Emajõe festival	300 000
Mittetulundusühing Pimedate Ööde Filmifestival	TARTuFF	500 000
Sihtasutus Eesti Teatri Festival	Eesti Teatri Festival 2008	500 000
Mittetulundusühing Kirjandusfestival Prima Vista	Kirjandusfestival Prima Vista	300 000
Sihtasutus Tartu Muusikafestival	Tartu Hansapäevad 2008	1 700 000
Mittetulundusühing Üliõpilasmaja	Tartu Tudengipäevad 2008 - Tartu Kevadpäevad, Tartu Sügispäevad	300 000
Osaühing ERP	Festival Klaaspärimäng 2008	300 000

### Strengths:

- Festivals are centered around good ideas, drawing audience and volunteers
- Most of the festivals have their own target groups and regular audiences
- Festivals are supported by large institutions
- Festivals are organised by devoted directors and teams

### Weaknesses:

- The largest festival in Tartu is Hansapäevad ("Hanseatic Days"), that is more of a tourism and commerce than culture event.

## Tartu loomemajanduse strateegia

- The city has not clearly defined which are its so called “image creating festivals”. Their list is too long and their priority cannot be seen from the financial support they receive.
- Media is more interested in Tallinn
- All festivals cannot generate income from ticket sales
- Many festivals’ have total budgets as large as they should have advertising budgets
- A year based funding system creates insecurity for organisers
- Festival organisers keep changing and a lot of resources are spent on training
- Renting of equipment is too expensive

## Possibilities for development:

- Creating a center offering supporting services (public relations, financial expert, project writing, copyright advice, accounting, contracts, marketing)
- Better cooperation between public services and city government - for example, when reorganising traffic or using parks and streets
- Festivals become partly or completely chains of linked events or culture programmes
- Cooperation between festivals concerning advertising, marketing and negotiating with enterprises
- A databank of volunteers and organisers
- A board consisting of representatives from all festivals taking place in Tartu

## Risks:

- Risk of becoming too commercialised
- Organising festivals could become too expensive
- Festival organisers become exhausted and leave if paid too little

## Needs:

The principles regarding the funding of festivals must be agreed upon to guarantee their sustainable development. (The city) Image festivals should receive sufficient funds for having the effects expected from an image festival, and should be able to develop further. Image festivals should have the right to receive free advice from the city government’s experts. It would be good for the festivals to be divided/positioned throughout the year.

- Festivals’ center
- Joint discount offers and cooperation agreements between different festivals, supporters and sponsors
- Some festivals should receive free advice from city government expert.

## Development prognosis for the next 3-5 years:

- Festivals attract more international attention and join pan-European networks

## LITERATURE

Literature culture in Tartu is strong and supported by successful organisations. The Library of University of Tartu and Tartu Public Library with it’s branches cover the whole city also operate as cultural centres. Tartu department of Writer’s Union is a strong organisation protecting the interests of it’s members and proposing changes to the existing legislation. The department supports both it’s members and non-member writers, also starting projects benefiting writers and helping to popularise literature in schools.

Tartu has a web-page Kirjanike kodu (“The writers’ home”) and a youth literature magazine Värskke Rõhk. Some freelance writers (1/3 of total) in Tartu are able to concentrate on creative work

## Tartu loomemajanduse strateegia

because of the various stipends but most of the writers cannot support themselves by creating work alone. It is not easy for writers to find professional work in Tartu because they need to compete with a large number of philologists. While writers in Tallinn often work and create texts for advertising agencies, the writers in Tartu do not have these possibilities because of the lack of such agencies.

Tartu shares a problem common in all parts of Estonia - while literature is popular, the share of quality literature is decreasing. This might be connected with marketing strategies favouring commercialism and shows that new means to advertise quality literature are needed. Also, several publishing houses that concentrate on publishing quality literature, focus too little on marketing. Advertising literature through media is complicated. While radio stations connect with literature more readily, Estonian TV channels have stated that literature does not pair with TV – there are practically no shows or programs reviewing or popularising literature.

There are problems with copyright as Estonian authors have discovered several times that their works have been used in schoolbooks without asking them first. As Estonian market is very small, publishers try to keep their costs as low as possible and hope that authors' royalties will be covered by cultural endowments. Opportunities for receiving financial support from culture endowments are even smaller for translators and editors. This has led to a situation where writers feel that publishers do not value their work highly enough.

International communication of Estonian literature is difficult because it depends mainly on translating. Writers can share their experiences and exchange skills but for their works to reach another culture they need to be translated. There are several languages that lack good Estonian translators and too little of Estonian literature reaches other languages and cultures. Teaching Estonian in other countries and in Estonia as extra language courses in universities is one possibility for solving this. European Union translation projects need to be better used and more funds for translating literature need to be requested.

Writers' skills develop when they communicate with writers from other countries, but possibilities for this are not that good in Tartu because of the lack of funds. One option would be to better use existing possibilities, for example, to include Tartu to the Nordic poetry festival programme. Internationally, it is important for Estonian authors to take part of literature fairs and Estonian literature to be available on the net. The successful literature festival Prima Vista (part of the image festivals of Tartu) is working on making contacts with foreign writers and has invited them to Estonia on several occasions. But the festival has reached the point where it needs larger funding from the city to keep developing.

Another problem is the lack of distribution or marketing centre for books in Tartu. Writers wishing to sell their books need to transport them to Tallinn. Writers depend on stipends and funds, but also articles and reviews in the media.

### Strengths:

- Many libraries
- Free WIFI in libraries
- Tartu department of Writer's Union is a strong organisation connecting more than 80 authors from South-Estonia.
- Ca 30 of the writers work as freelancers and are supported by various stipends
- Writer's Union initiates projects that give work to writers and help to popularise literature in schools
- Writer's Home is a web address managed from Tartu and visited approximately by 100 people a day (20 000 people in year 2007)
- Presence of Estonian Literary Museum
- Literary festival Prima Vista
- Literary youth magazine Värske Rõhk
- Literature is popular
- Gustav Suits prize for Tartu-related collections of poetry

## Tartu loomemajanduse strateegia

### Weaknesses:

- The legislation concerning creatives is obsolete and needs modernisation
- In Nordic countries, writers often earn their living by giving lectures, but Estonia does not have such a tradition. Schools are the main institutions inviting writers to give lectures, but these institutions lack possibilities for paying.
- There are writers living in very poor conditions
- Writers leave Tartu to go to Tallinn, Amsterdam and, for example, Muhu island
- Quality literature is not valued or popularised well enough
- Connection with schools is weak and literature teachers are overburdened
- Writers do not have enough professional jobs and they must compete with the many philologists in Tartu
- The creation of writers' house in Ristikivi House is difficult
- Too little international communication

### Possibilities for development:

- Better cooperation between writers, libraries and other fields (enterprisers, tourists managers, etc.)
- Introducing, reviewing or advertising literature in TV
- Cooperation with philanthropic entrepreneurs
- Writers' exchange projects and including Tartu to the Nordic poetry festival programme
- Writers' studios with favourable renting prices
- Cooperating with writers when choosing and selecting books for libraries

### Risks:

- Writers leaving Tartu
- Quality literature, reading in general, and libraries could lose popularity

### Needs:

The literary organizations need space to work in and various support services, including accounting, project writing and advice on copyright laws, taxes and entrepreneurship. These services could be provided by other literary institutions, such as libraries.

In addition to the material infrastructures and support, writers would like to see that prizes, contracts and salaries comparable to work in other fields would reflect respect towards their work and skills. A master writer shouldn't be less paid than a medical worker or a lecturer in university. To facilitate contacts with foreign writers, Tartu needs a visitors' studio or a writers' house. There is a plan to create such a studio into the K. Ristikivi house museum and use it to host estophiles, translators or foreign authors.

- A centre supporting writers and literature teachers and mediating Estonian literature to Europe
- Certain services (copyright laws, contracts, legal and financial advice etc) should be offered to writers at a discount price
- Stipends for creative work and self-improvement outside Estonia
- Tartu needs a visitors' studio or a writers' house for foreign guests
- writers should be offered working spaces with favourable prices

## **VI Proposals to develop creative industries**

## Tartu loomemajanduse strateegia

Several topics and problems were common in different creative fields but there are also themes where opinions of the work groups or representatives of the fields didn't agree upon.

For example, the work groups did not agree on which creative industries' fields should be the top priority. It was agreed that currently all fields of culture should be developed equally – Tartu has its strengths, for example music and applied art, but the difference is not that great.

It is also possible to prefer the least developed field that needs the most support. In such a case, it should be investigated if such a strategy would be financially reasonable, as several fields (for example, cinematography and film making) need significant financial investments to develop over a certain level, and it is not guaranteed if such investments are possible. Another good option for determining the priority field is to wait for a few years in order for the most successful ones to stand out even more. Additional research would be still needed to make the choices that are also financially sound. When evaluating culture, both qualitative research and advice of the experts and opinion-leaders of Tartu needs to be listened.

The following gives an overview of the main problems and possible solutions. The conclusions and solutions have emerged from the 10 meetings of the work groups. 82 people gave their opinion during the meetings.

### **1. Problems with space**

Almost all fields needed more working space. This includes everything from private working or office spaces and studios to public studios, galleries, rehearsal halls and storage spaces. Although Tartu has many theatre halls, there is still a need for a space with favourable renting prices operating like the theatre/club Genialistide Klubi. Allotment of space similar to that of the Von Krahl theatre/club in Tallinn would be suitable.

Proposed solutions:

- There is a need for a larger multifunctional centre similar to culture factories. It should be open to the public and contain space for the city gallery and several studios for creatives from different fields. The centre should also have a hall which would be suitable for theatres or concerts but would have favourable renting prices for smaller cultural organisations.
- Existing buildings and free space should be better utilised as studios.

### **2. Problems with skilled labour**

Because most of the salaries of creatives are too low, two tendencies emerge. The first one shows that people leave Tartu to work in Tallinn, where they have better salaries and opportunities to create. The second is that creatives in Tartu often have several jobs to support themselves – this overburdens them and the quality of their creative work may decrease.

Almost all fields need more professional managers or organisers. To maintain professionalism and keep developing, creatives need to communicate with foreign colleagues and take part of international events, competitions or other programmes.

Proposed solutions:

- Creating a system of stipends for the creatives to make study trips abroad and develop international cooperation
- Organising training courses for creatives – both for increasing professional development and culture management
- Creating mentorship programmes and finding experts, instructors and mentors from Estonia and other countries
- Cooperation and exchanging experiences between creatives and entrepreneurs

### **3. Young people do not have enough possibilities for creative self-realisation**

Tartu has many schools and a high number of annual graduates. Many of those young people would like to do creative work in Tartu, but the city does not have enough possibilities for professional work in all creative fields. Most renting prices of studios or working areas required by creative work are too high for them. In addition, young people value very highly the possibility to feel independent and not belong to any large organisation.

Proposed solutions:

- Equipment and rooms with favourable renting prices for young creatives, the latter to be used both for working and living
- Programmes for training and involving young people in creative industries

#### **4. Low economic, financial and entrepreneurship skills or skills needed to operate on an international level**

The economic, financial and entrepreneurship skills and knowledge of creatives are usually very low. The people working in establishments of culture do not often know how to write even the simplest of projects nor establish budgets.

Ministry of Culture does not receive enough support and encouraging from EAS because the consultants and advisers of EAS often do not have the skills required to give advice to cultural establishments. Starting creative enterprises need help and support from other creatives and successful creative enterprises need help to reach new levels of development.

Proposed solutions:

- Entrepreneurship trainings and a respective information centre for creatives
- Creating a mentorship system that provides advice to starting creative enterprises and organisations wishing to expand to operate at the international level
- A system that enables creatives to receive consultation on project writing, legal issues, accounting and other similar topics at a reduced price.

#### **5. Too little cooperation between creatives, cultural institutions, the city, and commercial enterprises**

Current main role of the city government for creative industries is awarding grants and asking for various permissions. At the same time, Tartu has many creatives who have good proposals for the development of the city and who are ready to present them. It would be also good to popularise the concept of enterprises using ideas of the creatives to solve problems or even make long-term plans. For example in Amsterdam, creatives are invited to take part of the companies' work groups that write business plans.

Proposed solutions:

- The city government should use creatives as experts and advisers in work groups that deal with design, development and cultural planning of the city
- The city government should initiate meetings where entrepreneurs and creatives could cooperate and benefit each other

#### **6. International communication is not sufficient**

While cultural establishments of Tartu have international contacts and creatives also draw inspiration from outside Estonia, there are still too few of such opportunities. Only a small number of organisations in Tartu are part of European or international networks or have reliable partners

Tartu loomemajanduse strateegia

outside Estonia.

Proposed solutions:

- More stipends for self-improvement outside Estonia
- Support for organisations wishing to join European networks, for example by paying the membership fee

#### **7. Skills of writing international projects and applying for grants from European funds are too low and funds remain unused**

Europe has several funds that could be used to help develop the cultural life of Tartu. They do not need to be specifically culture funds – the funds that support education, social life and science could be also used for supporting culture. Such opportunities are only minimally used in Tartu. Consumers and large markets can be reached through internet and young people recommended creating a web-based Creation Studio that is free for all and provides an opportunity to reach international audiences.

- Creating a project centre for supporting cultural activities in Tartu and employing experts to provide support services for creatives
- Use of opportunities provided by internet and IT to facilitate creative industries should be better utilised
- Information exchange environment in addition to the Kultuuriaken web page
- A web environment for creatives to exhibit and sell their works

#### **8. Current options to advertise cultural establishments or events are not sufficient**

There are practically no possibilities for hanging up advertisement posters at the Tartu city centre. There are some advertisement columns, but there are no specified spaces for advertisements supported by the city. Advertisements are currently taped to the walls of older houses or fences, resulting in an unaesthetic outcome. At the same time, the need for advertisement poster space is great. Festivals have tried to cooperate with largest shopping halls of the city, but this is an effort and time-consuming process.

Tartu city and its cultural events should be also more advertised in other parts of Estonia, for example, in TV.

Proposed solutions:

- Finish the Culture Wall of Tartu, the place where all cultural establishments of the city could hang advertisement posters of their events.
- Improve cooperation between Tartu and the main shopping centres with the goal of having information walls with cultural advertisements inside the centres.
- The quantity and quality of TV shows advertising Tartu should be improved

#### **Work groups had several proposals for city governments concerning the funding of culture events in the city**

The current annual and year-based financing regulations do not favour planning long-term and sustainable activities. International events and festivals that take place in the beginning of the year suffer the most because of this. The organisers of Kunstikuu (“The Art month”) face each year the same difficult problems because the information concerning the funding reaches them almost at the time when the festival begins.

The work groups proposed that decisions for the large scale funding of culture projects should be made quarterly (as in Estonian Cultural Endowment) but the deciding process should be much faster than in the Estonian Cultural Endowment, since the two months required to make decisions by the endowment seems unreasonably long for the organisers. It was also proposed that at least some of the grants from the city should be awarded through Tartu Cultural Endowment.

**The main needs and proposals agreed upon during the work group meetings are as follows:**

- **Developing creative industries in the next few years should not be focused on a specific field. A possible general focus could be strengthening cooperation between culture and education**
- **The support funds for image creating festivals of Tartu should be agreed upon at least a year before the festival takes place. Grants for organising smaller events should be available throughout the year through Tartu Cultural Endowment**
- **There is a need for information exchange environment in the internet, for example, a supplement to the Kultuuriaken web page that would contain the following:**
  - **databank of spaces that could be used by culture industries**
  - **databank of creatives and creative enterprises with their contact information**
  - **a section for buying, selling and bartering**
  - **forums for creatives, politicians and entrepreneurs**
  - **a section for introducing creatives and selling their work internationally**
- **There is a need for an organisation or a system that brings together creatives and entrepreneurs and creates projects and programmes beneficial for both parties.**
- **The city government should use creatives as experts and advisers in work groups that deal with design, development and cultural planning of the city**
- **There is a need to better advertise culture in the city – creation of the Culture Wall, cooperation with shopping centres and featured shows in media channels.**
- **Young creatives need a suitable centre to develop their skills and engage in creative work**
- **Artists need a city gallery that is easily accessible by the audience, for example, one that is located near the new library building**
- **Build a hall that smaller organisations could rent for their cultural events with favourable prices**

## **VII Recommendations for Tartu City Government**

The present document reflects the ideas of the representative of fine arts in Tartu concerning developing creative industries and the main needs during the coming years. The work groups devising the strategy were compiled mainly with respect to the list of creative industries fields provided by Estonian Ministry of Culture. Taking into account the special characteristics of Tartu, festivals and handicraft work groups were also included. The work groups also tried to find out the main needs of the young creatives in Tartu.

Tartu loomemajanduse strateegia

At the same time, there are several fields at the borders of fine arts, such as architecture, design, publishing etc. that need similarly throughout research to be carried out.

The ideas and proposals presented are a sum of ideas and proposals made by 82 experts from various cultural fields. Several of the topics have been discussed for years and some of them have also been mentioned in earlier development strategies of Tartu.

**One of the most important goals of creative industries is bringing creatives and enterprises closer together and initiating cooperation between them. Inviting the creatives and culture workers to be part of the planning of the city development is similarly important.**

**Changing beliefs and attitudes is similarly important for developing creative industries**

It is important to change the attitudes of creative and culture workers and motivate them to learn enterprising and economy skills. At the same time, it is important to adjust enterprisers' beliefs and attitudes about creatives and value of art. Culture, creativity and new ideas are gaining more and more importance both in economy and everyday lives of people, and therefore require higher social and financial respect and supporting.

**Experiences from European cities show that developing creative industries is possible and successful only when based on an open discussion involving different interested parties and stakeholder groups**

Such a discussion can be initiated by a local government or social initiatives, but it is important that it involves representatives from as many fields and professions as possible. Developing creative industries shouldn't be a single project of a single department of city government. It should be viewed rather as a general developmental plan and vision that involves different departments of the city government, universities, establishments of education, entrepreneurs, creatives and representatives from the third sector.

**The experience from other countries shows that the following steps must be taken:**

1. Introduce and explain the notion of creative industries to various groups, including the policy makers
2. The priorities for creative industries of Tartu must be agreed through discussions with politicians, opinion leaders and other stakeholder groups
3. Carry out all surveys and researches needed to determine and map out these priorities
4. Create a vision and an action plan for creative industries organisations and centres in Tartu and elaborate their goals, fields of activity and funding plans

Several cities have created a special department or other unit with authorization to cooperate with all departments of the city government or stakeholder groups in the city.

These organisations are usually created, funded and supervised by the city or state.

Experience from other European cities shows that field-specific centres are motivating and help to develop their field, but do not serve their main purpose – integrating different fields, facilitating contacts between creatives and enterprises, change attitudes of societies etc.

Attaining such goals and sustainable development of creative industries means a single larger centre needs to be created, one that mediates information flow between different fields, organisations and stakeholder groups, and helps with all other problems connected with creative industries.

**As a conclusion, the following important observations have been made:**

- The young people in Tartu are enterprising, initiatory and creative. During the recent years, several new phenomenon that demonstrate this have been created – groups of active young creatives (the Baas centre), Genialistide theatre/club, newspaper Müürileht etc. They have high potential of creating new creative industries enterprises but relatively small needs - mainly space with favourable renting prices and a minimal activity support.
- The meetings of work groups showed that the cultural workers and creatives have high hopes (sometimes too high) concerning the activities carried out by Tartu city government and its department of culture. People think that the department of culture is free to make culture policy decisions and development plans, assign funds and carry out others development actions. To avoid a contrast between these hopes and reality, the first step could be distributing the tasks connected with creative industries to different sub-organisations or field-specific organisations and provide them also with respective financial support.
- In a long-term perspective, creative industries should be managed by a special centre, incubator, culture factory or another similar special organisation.
- Creative industries' development should begin with research funded by EAS and various other creative industries' funds that are to be soon created. Research should investigate the following:
  1. Mapping creative industries in the field of architecture, design, advertising and publishing
  2. Mapping the activities and needs of self-employed creatives
  3. Mapping the needs of enterprises to determine, which creative services or skills they could need and if Tartu has sufficient possibilities to satisfy those needs

The authors of this document appreciate the fact that creative industries have received such attention and priority level.