



TONY BLAIR INSTITUTE FOR GLOBAL CHANGE

Ukraine's Creative Industries: A Strategic Asset for Resilience and Recovery

APRIL 2026

Scope & Approach | TBI's value analysis combines desk research with expert interviews and case studies

CI's contribute to UA's recovery through measurable economic output and holistic support for Ukraine's **identity, community and international standing**. This analysis treats both with equal rigor.

Quantitative evidence (financial & economic)

- 1 **Official GoU data** (SSS, NBU, MoC)
- 2 **Ukrainian Policy Analysis** (EU, Centre for Cultural Studies etc)
- 3 **UNESCO creative economy mappings**
- 4 **International comparators & case studies**

Qualitative evidence (institutional & societal)

Interviews across UA's creative sectors:

- **UA cultural experts:** Lanka, UCCF, RESPOL, Tetyana Teren
- **Key donors:** British Council, Robert Bosch etc.
- **Cultural actors:** Jam Factory, Culture Shock etc.

10+ detailed case studies:



Exec Summary | Culture is a pillar of UA's resilience, an engine of its recovery & ready for scaled support



Resilience Case

- **Culture is increasingly framed as national security** — by NATO, EU and at MSC
- **Culture anchors frontline cities, reinforces identity, and projects UA globally** — exports have pivoted to EU, incl. 24 countries via Team Europe
- With **1,700+ heritage sites & 2,500+ institutions damaged**, UA is testing this under fire & offers resilience lessons to allies



Recovery Case

- **Leading economies already treat CI as a strategic priority** (e.g., UK, DE) — a vision for Ukraine's future
- **CI grew from 2.6% to 4.3% of GVA (2015–21)**, outpacing key sectors like agriculture
- **Majority of roles held by u30s** (consistently **2.5x higher** vs. other major sectors); digital, capital-light, and services-led, the sector has rebounded faster than most



Way forward...

- **The Ministry of Culture is already moving** — through the CRA (28 members) and targeted sector support programmes
- Unlocking the sector's full potential requires **action on finance, workforce, regulation, and infrastructure**

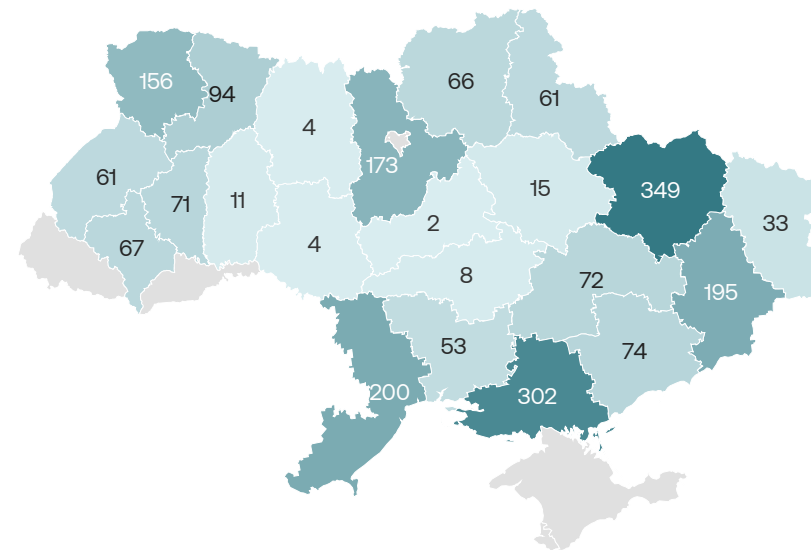
The full-scale invasion is an attack on identity as well as on territory

Physical destruction. Cultural and heritage sites have been deliberately targeted, with damage and losses concentrated in frontline regions and occupied territories

Linguistic and cultural suppression. In temporarily occupied territories, Ukrainian language and cultural production are being systematically replaced and reorganised around a Russian narrative

The war on memory. Ukrainian cultural production — oral histories, literature, 3D documentation, film — has become a counter-record: evidence that resists distortion and preserves truth for future generations

Cultural heritage sites damaged or destroyed (as of April 2026)



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~1,723
cultural heritage sites
damaged or destroyed

~2,524
cultural institutions
damaged or destroyed

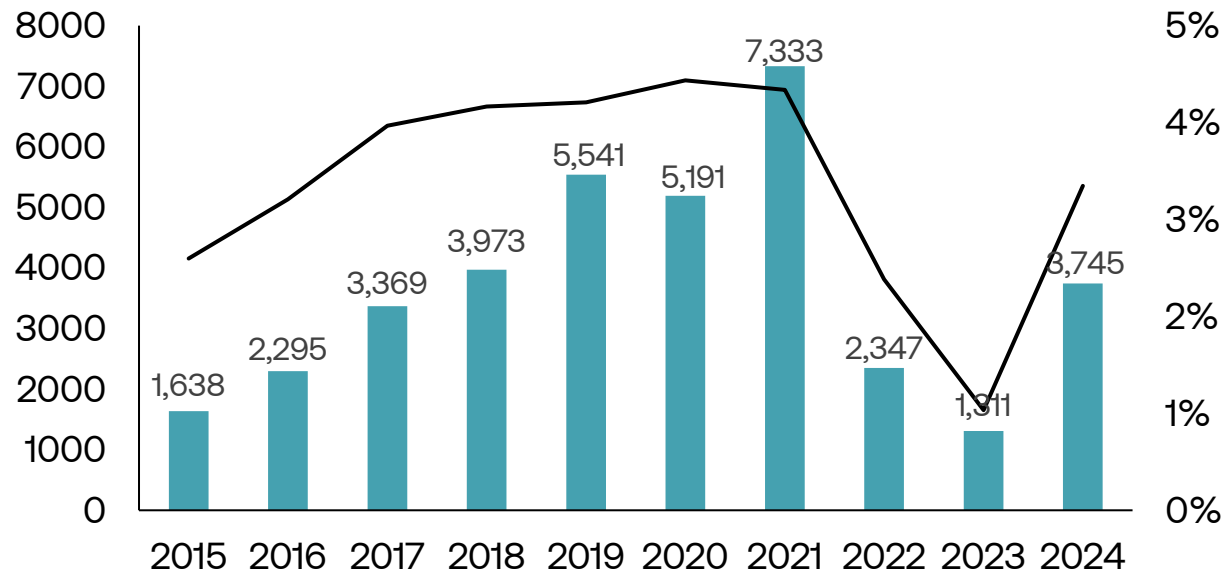
41%
of Ukraine's population
cut off from cultural life

Creative Industries were also severely affected, and recovery is underway, but incomplete

Creative industries are the sectors through which Ukrainian culture is produced, recorded, and carried into the world — **film, publishing, music, design, advertising, IP-driven tech, and the institutions that support them.**

Changes in GVA over time

Actuals (USD millions)/ % of total GVA



1

Significant pre-war growth. CI grew ~28% annually between 2015 and 2021, outpacing manufacturing and agriculture and rising from 2.6% to 4.3% of total GVA, adding nearly \$6bn of value.

2

Recovery underway, but not enough. CI GVA rebounded to ~\$3.7bn by 2024 thanks to digital delivery and capital-light foundations, but remains roughly half its 2021 peak

^T Note: Note: GVA (Gross Value Added) measures a sector's contribution to the economy and is the building block of GDP. Direct GVA excludes spillover effects, so the true economic value of Creative Industries is likely higher..

Source: State Statistics Service of Ukraine.

Digital, young, EU-facing – Creative Industries are structurally built to recover



Digital and capital-light: built to absorb shocks

- Most CI output is **digital, IP-driven, and services-led**
- 48% of CI freelancers **rely on platform work**
- Digital delivery sustained exports during wartime, aligned with a **29% global rise in CI service exports** (2017–22)
- **AI adoption is increasing productivity** and income among digital workers



Youth-powered: retaining the generation Ukraine cannot afford to lose

- **Majority** of CI roles are filled by **Ukrainians under 30**
- **Structurally accessible to youth** through digital platforms, freelance work, and transferable skills
- **Wages track the national average**, with premiums in IP-driven tech
- In a shrinking workforce, CI helps **retain the generation** Ukraine most needs



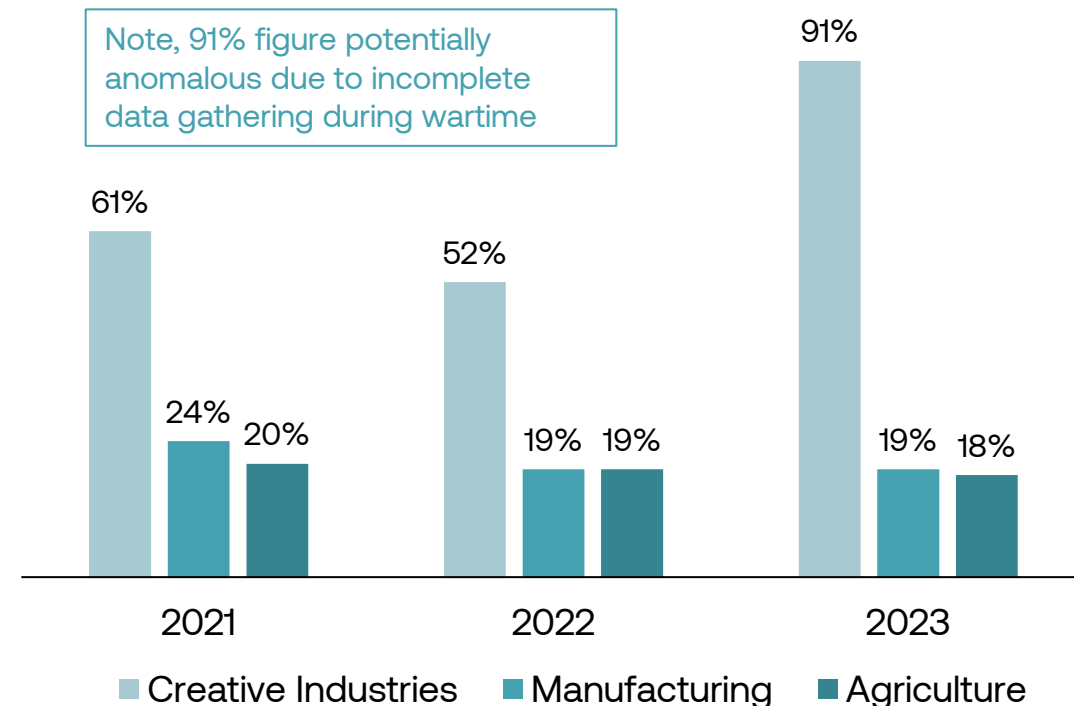
EU-aligned: the economic shift is already done

- The EU has displaced Russia as the dominant CI export market, **rising from 49% to 83% of total CI exports** between 2021 and 2025
- **Net increase of \$23.4m** across European markets, distributed across EU27 rather than clustered

Creative industries are significantly more youth-intensive than Ukraine's traditional sectors

Youth Share of Employment

% (2021-2023)



1

CI is structurally one of the youngest major sectors in Ukraine's economy. Even before the invasion, CI employed Ukrainians under 30 at 3x the rate of Manufacturing and Agriculture

2

The war deepened the divergence. CI's youth share dipped in 2022 (52%) as displacement and labour-market collapse hit young workers. In 2023 digital and remote work re-employed under-30s while older workers exited the sector

3

CI is anchoring the generation Ukraine cannot afford to lose. CI is one of the few sectors actively retaining under-30s in the domestic labour market

Beyond economics | From frontline anchor to global ambassador, culture is central to UA's recovery and story

1 Anchoring communities



Cultural institutions serve as **community anchors**, sustaining everyday life



Displaced people hosted and amplified through cultural programmes



Social cohesion stronger as culture connects fragmented communities across UA

2 Reclaiming UA identity



Strong drive for decolonisation



Cultural production creates **records that resist russian distortion**

2x increase in apps for translation into Ukrainian (from 84 to 179)

57% of music **consumed** in UA is now **Ukrainian** (33% pre-invasion)

3 Enabling UA to tell its story abroad



Cultural presence accelerates **EU integration**, embedding UA in European institutions



Positions **Ukraine as a cultural peer**

Diaspora driving **global demand for UA culture objects contributed to Europeana**

44

~600K

books **distributed to displaced children** across Europe

Ukraine has already built a working foundation for creative industries – now it needs to be scaled further

UA's government has recognised the **strategic value of its creative sector**, launching **targeted programmes to support** entrepreneurship and cultural infrastructure



Vlasna Sprava: Grants supporting small businesses, with a dedicated CI chapter. Projected to create 10,000 jobs in 2026



Ukraine Cultural Fund: State grant agency supporting culture & CI's across 7 sectors (~3,000 projects funded)



Ukrainian Book Institute grants: Funding for translation & publication of UA books abroad with ~100 projects in 33 countries



Thousand Spring: Programme launched to fund Ukrainian cultural content (film, music, arts) with 4B UAH



Mecenatstvo reform: Financial compensation mechanism returning 10% to patrons who invest in cultural institutions



CuRe & CRA: €570M+ committed across 28–29 European partners via the Cultural Resilience Alliance and Culture Recovery programmes

Creative industries are driving growth and resilience in some of the world's advanced economies



- **Creative sector grew 31%** (2010–2022) vs 22% UK average - **third fastest-growing sector**
- UK had the world's third-largest creative **trade surplus** in 2023 (\$31.3bn), up sixfold in 15 years
- Creative industries are a **top UK growth priority**, with investment targeted to reach £31bn by 2035



- **K-content exports** hit \$13.2bn in 2022 (+25% YoY), **surpassing appliances and Evs**
- Since 1999, **at least 1% of the national budget** has gone to the creative sector
- Korean Wave built through decades of **state policy**; now a key economic and soft-power asset



- **€106bn GVA**; 1.2m core workforce (1.8m incl. marginal employment)
- **Outperforms chemicals, energy, and financial services** in GVA
- Since 2007: **federal initiative** w/ annual reporting, sector lead, and innovation programmes

Partners can support Ukraine's cultural sectors – and learn from their experiences – through existing initiatives



What it is

Who it's for

Cultural Resilience Alliance (CRA)

Cultural diplomacy **platform** - **28 partners coordinating support** for Ukraine's cultural sector

Governments, national **cultural institutions**, **foundations**, **businesses**

Equipment for Culture (E4C)

Initiative **providing equipment** and **operational infrastructure** to UA cultural institutions

Bilateral **donors**, **businesses**, **foundations** focused on operational support

House of Europe

EU-funded programme for **culture**, **education**, **media**, **social entrepreneurship**

Ukrainian **cultural institutions**, **creative professionals**, **NGOs**

EU4Culture II

EU project supporting **culture as a driver of regional development** in cities across Eastern Partnership

CCS actors & organisations; **EU cultural networks** and **Member State cultural agencies** as partners

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10+ detailed case studies:



Exec Summary | Culture is a driver of UA's resilience, a pillar of Europe's security & a compelling investment case



Strategic Case for Creative Industries

- **Culture is increasingly framed as national security** e.g. by NATO, the EU, UNESCO, and Munich Security Conference
- **Leading economies are treating CI as a strategic priority** – including CI into core economic agendas
- Ukraine, with **1,700+ heritage sites** and **2,500+ institutions damaged** is where this shift is being tested under fire



Young, Digital & Built to recover

- CI's grew **from 2.6% to 4.3% of GVA** (2015–21), outpacing key sectors like manufacturing and agriculture
- **Strong majority of roles are held by Ukrainians under 30**; digital, capital-light, and services-led, the sector has rebounded faster than most



Culture at the frontlines

- Culture **anchors** frontline cities, reinforces UA **identity**, and **projects the country globally**
- Creative **exports have pivoted to the EU**, with Ukraine partnering with 24 EU countries through Team Europe for Cultural Heritage



What UA is building and how to support it

- **The Ministry of Culture is already moving** — through the Cultural Resilience Alliance (28 members), and targeted sector support programmes
- Unlocking the sectors' full potential requires **action on finance, workforce, regulation, and infrastructure**

The strategic case for creative industries

From soft power to hard security – culture is being recognised as a national security imperative

Munich Security Conference 2024 and 2025 featured sessions on the **link between security policy and culture**, addressing the role of **culture as resistance**

- MSC 2025 specifically addressed Ukrainian cultural heritage under Russian invasion



EU member states signed a joint declaration asserting **culture's necessity as a democratic safeguard**

- 24 EU countries already running Team Europe for Cultural Heritage in Ukraine



NATO now **treats identity and narrative as domains of adversarial warfare**. Cultural memory and heritage are identified as **explicit targets**

- “Weaponizing identity” and “weaponizing narratives” have entered NATO doctrine since 2023



The first-ever UNESCO Global Report on Cultural Policies framed **culture as central to peace, security, and sustainable development**

- UNESCO members propose making culture a **Sustainable Development Goal** post-2030



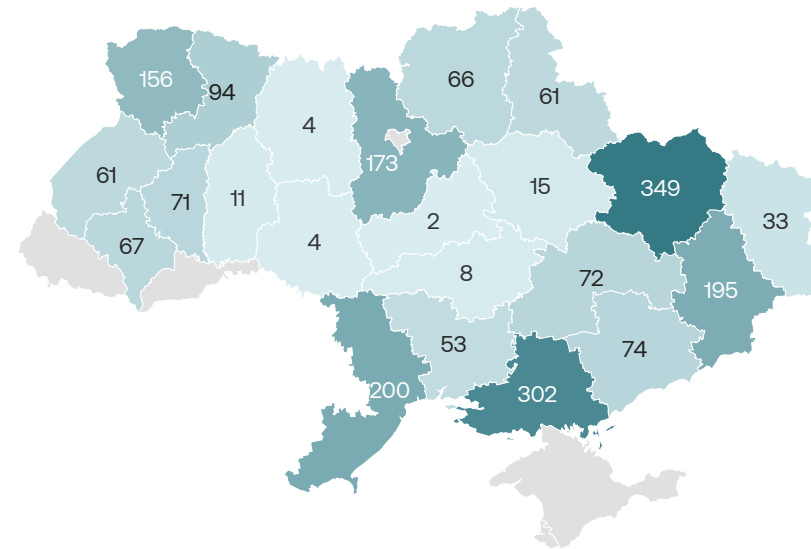
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Young, digital, and built to recover

Summary | Creative industries offer a capital-light, youth-led route to jobs recovery



Capital- light & digital

- 48% of CI freelancers **rely on platform work**, with high-value segments earning \$1,000–3,000+ monthly vs. ~\$640 national average
- Digital delivery **sustains exports** during wartime, aligned with a 29% global rise (2017–22)
- **AI adoption is increasing productivity** and income among digital workers



Youth-powered

- **Strong majority** of CI roles are filled by **Ukrainians under 30**
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- In a shrinking workforce, CI helps **retain the generation** Ukraine most needs



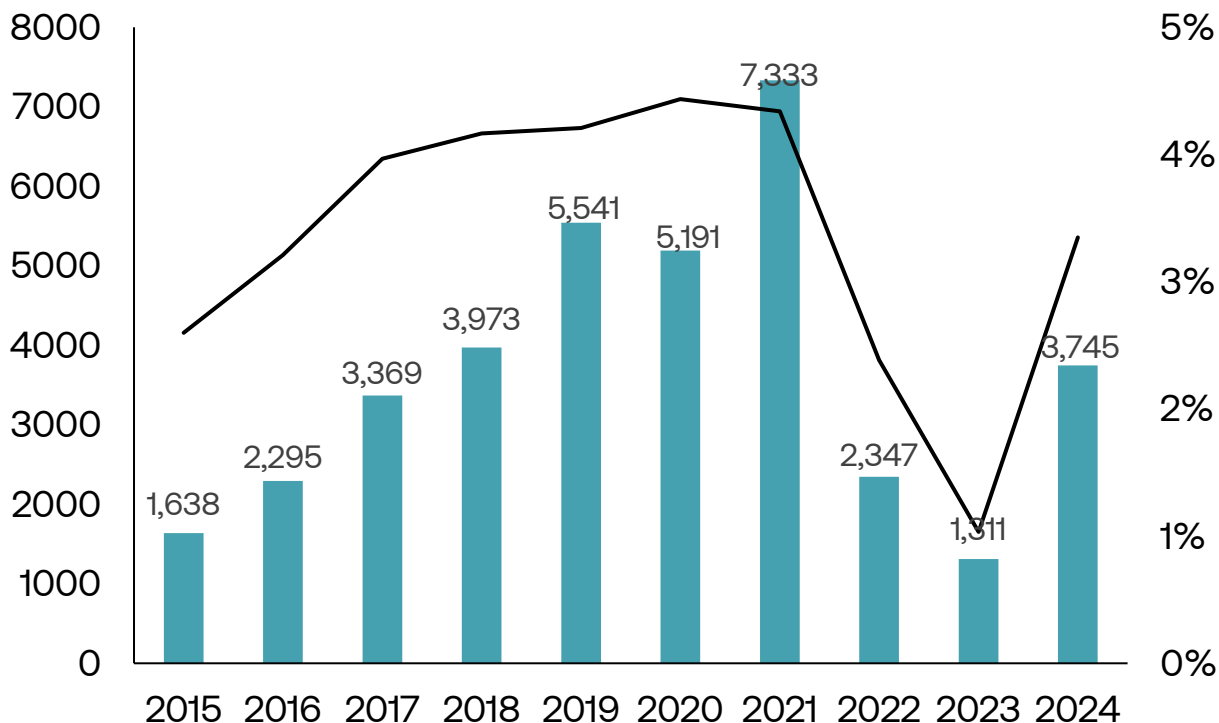
Built to recover

- **Sharp contraction in 2022**, followed by the **fast rebound**—driven by the same structural features
- **Three high-productivity clusters** (Kyiv, Lviv, Kharkiv) anchor the sector, with Kharkiv showing remarkable resilience even under bombardment
- The **EU has replaced russia** as the **main CI export** market (+\$23.4m since 2021), reflecting Ukraine’s broader reorientation

Creative industries have proved resilient, rebounding toward pre-invasion growth rates

Changes in GVA over time

Actuals (USD millions)/ % of total GVA



- 1 Rapid pre-war growth**
CI grew ~28% annually (2015–21), outpacing other sectors, with its GVA share rising from 2.6% to 4.3% - adding nearly \$6bn of value
- 2 Sharp wartime contraction**
CI GVA more than halved in 2022—the second-steepest sectoral drop—**driven by demand shocks and concentration** in urban hubs
- 3 Fast rebound**
The same **structural features drove recovery** - digital delivery, geographic flexibility, and minimal physical capital needs

Note: Note: GVA (Gross Value Added) measures a sector's contribution to the economy and is the building block of GDP. Direct GVA excludes spillover effects, so the true economic value of Creative Industries is likely higher..

Source: State Statistics Service of Ukraine.

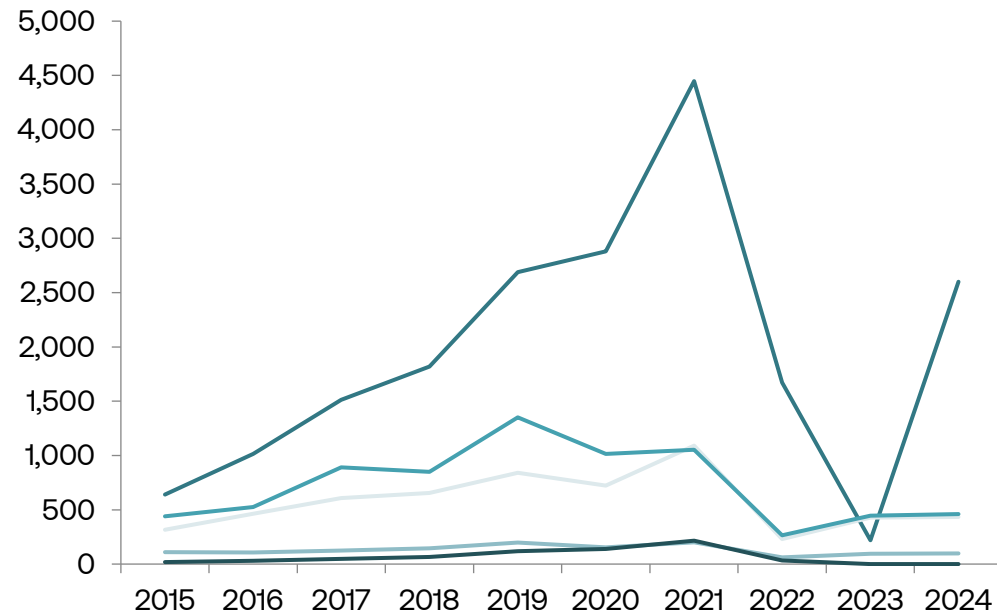
IP-driven tech still anchors the sector, while services-led subsectors lead the post-war rebound

CI GVA grew rapidly pre-war before contracting in 2022...

... with a rebound of +26% post-war recovery, nearly matching the pre-war pace

CI GVA by subsector

(USD millions)



Note: No data available for Design post-2021
Source: State Statistics Service of Ukraine.

Subsector	Pre-war CAGR (2015–21)	Post-war CAGR (2022–24)	GVA share (2024)
Design	+49%	N/A	N/A
IP-driven tech	+38%	+25%	69%
Advertising, marketing, PR	+23%	+37%	12%
Other	+20%	+34%	4%
Audio & Audiovisual	+16%	+32%	12%
Publishing	+11%	+27%	3%
Total CI	+28%	+26%	

Today, freelancing and remote work are absorbing Ukraine's wartime labour market shock

Ukraine's wartime labour market is being absorbed by freelance platforms...



43%

of freelancers entered the market during war



48%

now rely on freelancing as their sole income source



\$1,000–3,000+

monthly income for high-value segments (IT, marketing) vs. ~\$640 national average

...reflecting structural features of the European cultural economy

1

Platform work is absorbing displaced workers

as freelancers moved online during wartime disruption

2

UA's high freelance share reflect broader sector norms

- ~32% of EU cultural workers are self-employed vs ~14% economy-wide

3

AI adoption is boosting productivity and income among digital freelancers

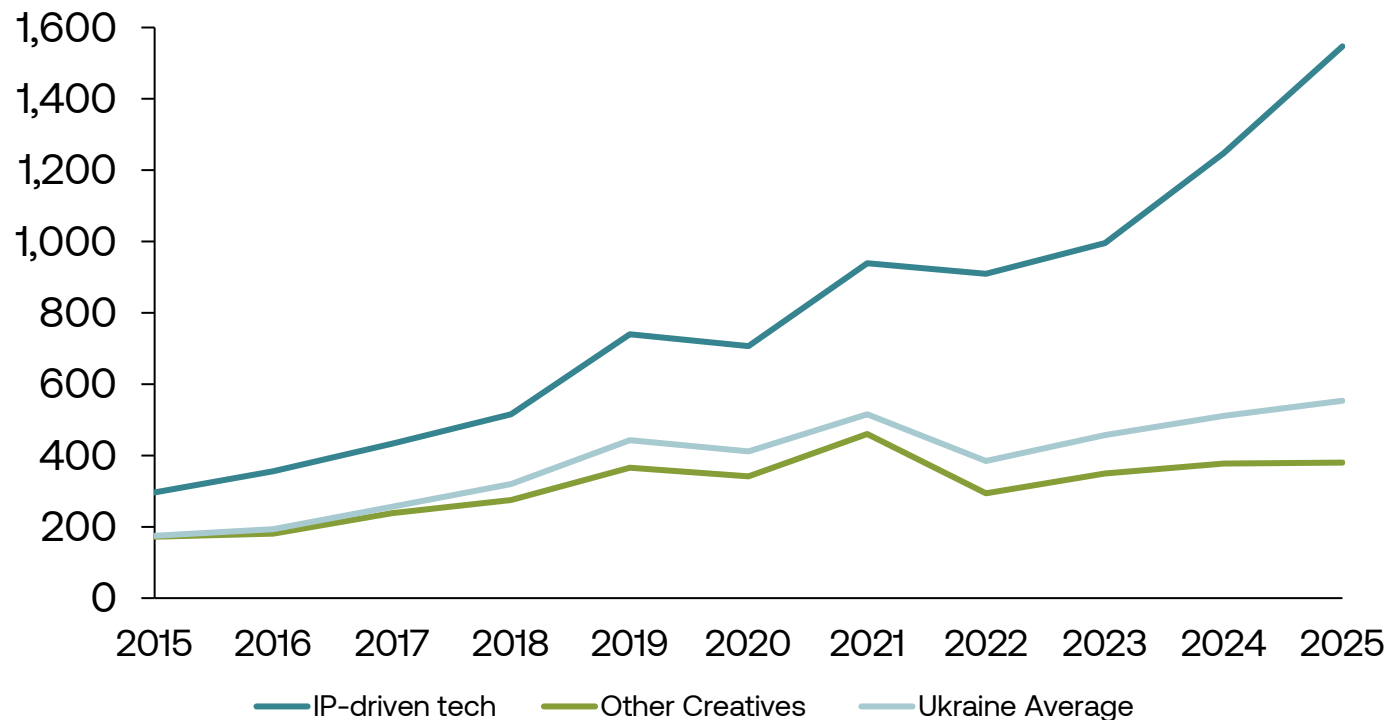
in line with a 29% global rise in CI service exports (2017–22)

Note: Survey of platform-based freelancers (n=960); not nationally representative

Source: Freelancehunt Research Centre, ILO Digital Platforms (2021), OECD Handbook (2023), Eurofound (2023), UNCTAD Creative Economy Outlook 2024, Eurostat (2025), State Statistic Services of Ukraine (2025)

Wages have tracked broadly with the national average, with tech roles commanding a significant premium

Average Wages in Creative Sectors vs. Ukraine
(USD)

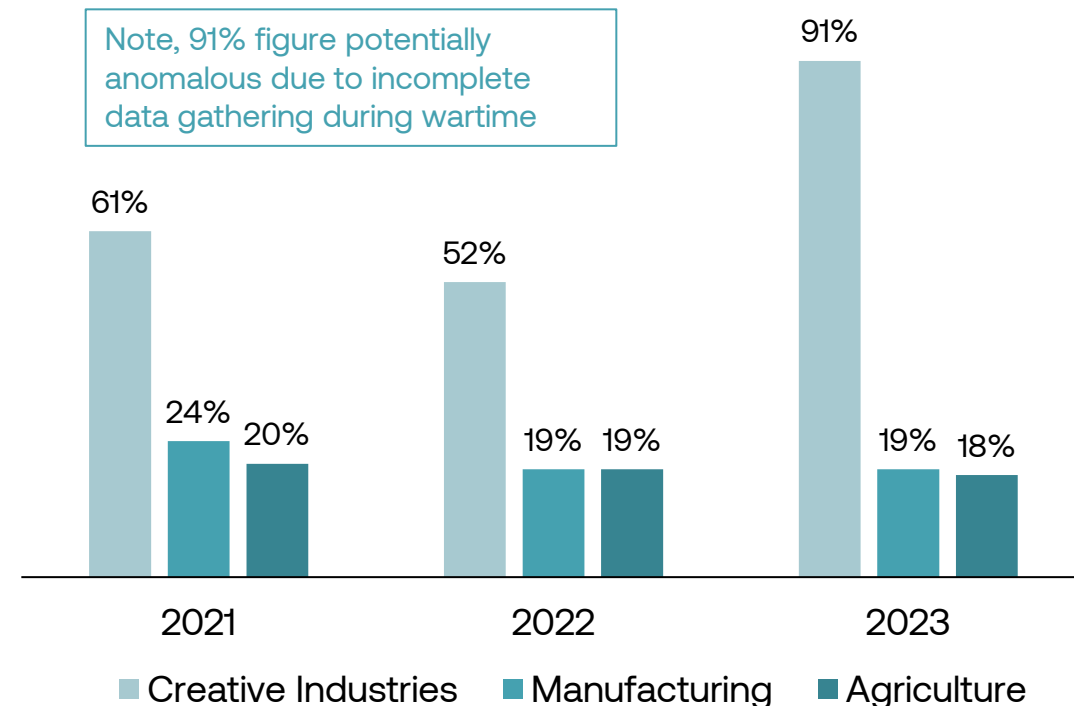


- 1 Wage resilience for IP-driven tech post-2022 suggests **sustained demand** for creative/digital skills
- 2 Wages in **other creative subsectors dropped** in 2022 but have stabilised above the 2015 base, suggesting that the **sector remains competitive**

Creative industries are significantly more youth-intensive than Ukraine's traditional sectors

Youth Share of Employment

% (2021-2023)



1

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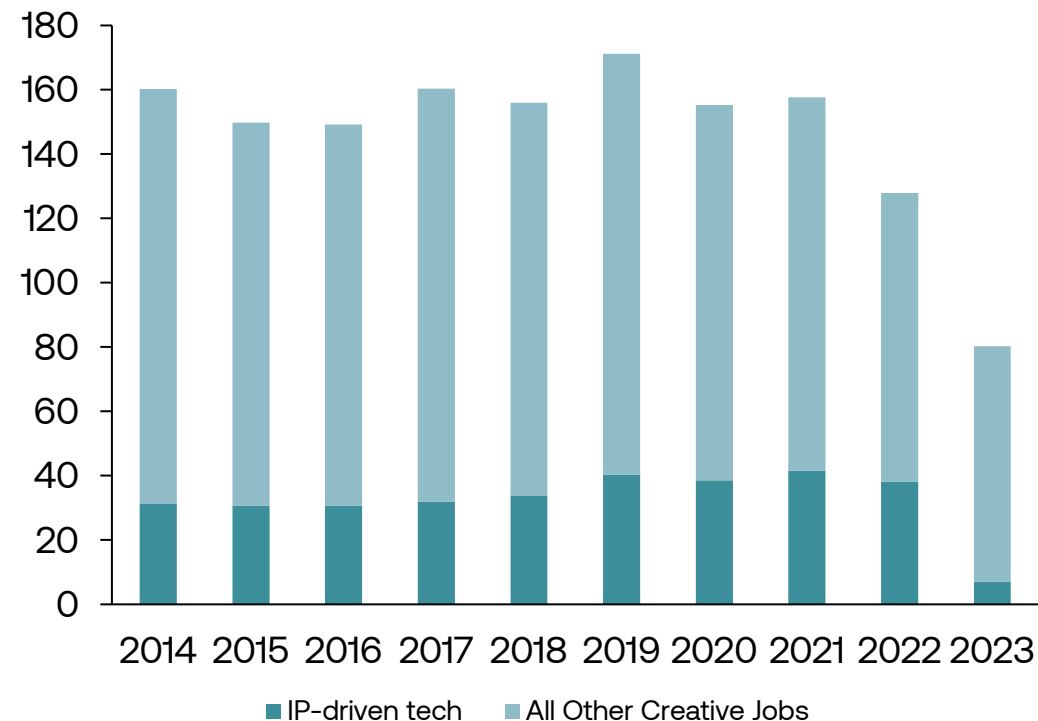
3

CI is anchoring the generation Ukraine cannot afford to lose. CI is one of the few sectors actively retaining under-30s in the domestic labour market

Culture generated a significant number of skilled jobs before 2022, but labour force has contracted sharply since

Total Number of Jobs in Creative Sectors

(000s)



1

CI employment remained stable at ~150k pre-2022 but GVA grew heavily, suggesting **significant productivity gains**

2

Labour force contracted **-18.9% in 2022** – **2nd sharpest decline** of any sector & **significantly above the average** (-15.8%)

3

By 2023, recorded employment had fallen **-53%** vs. peak, though this likely overstates true losses given **data limitations**

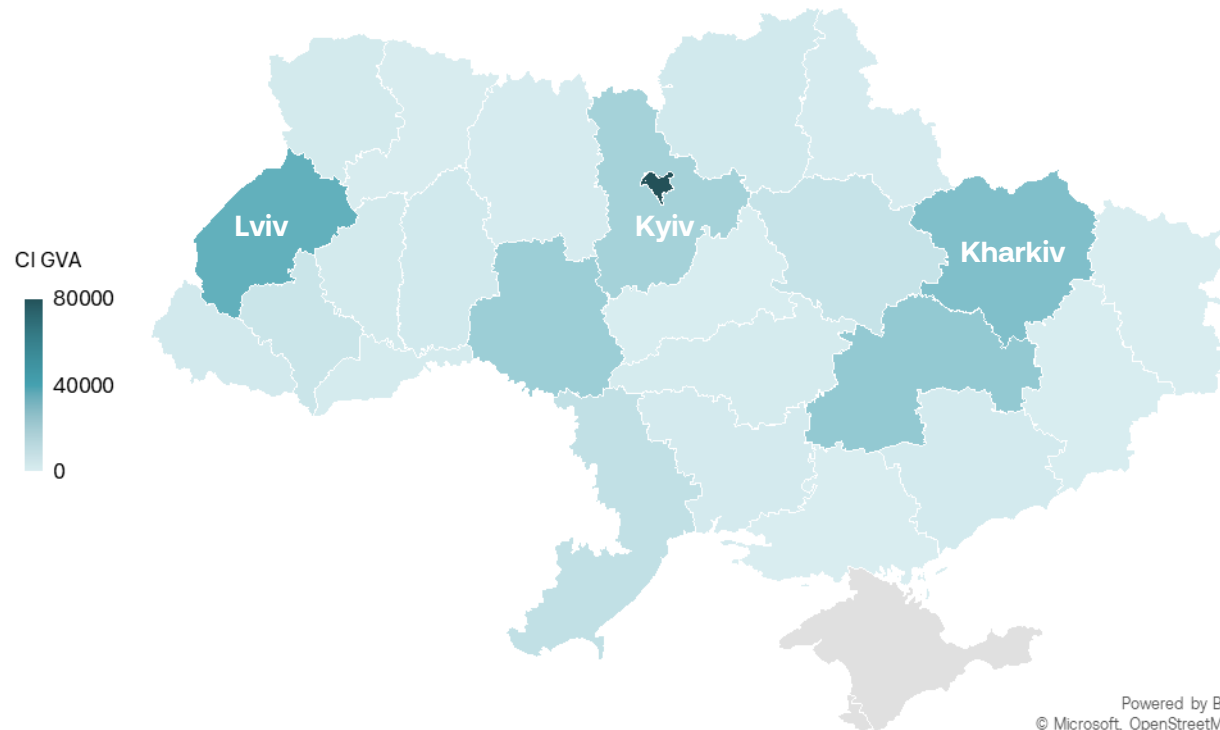
4

Recorded employment **excludes much freelance and platform-based work**

However, in driving recovery, the creative industries will continue to rely on three high-productivity clusters

Creative Industries GVA by Oblast

Actuals (000s USD)/ Absolute (2024)



- 1 CI activity **concentrated in geography** - highest output in **Lviv, Kyiv, Kharkiv**
- 2 Each hub has **unique recovery profile**
 - Kyiv **dominates CI output**
 - Lviv **deepens EU integration** (ECoC 2030 shortlist)
 - Kharkiv demonstrates culture can **thrive even during active conflict**
- 3 Hubs are a **structural strength**
 - remote work means **firms pay salaries across country**
 - **cluster spillover effects compound value** for economy

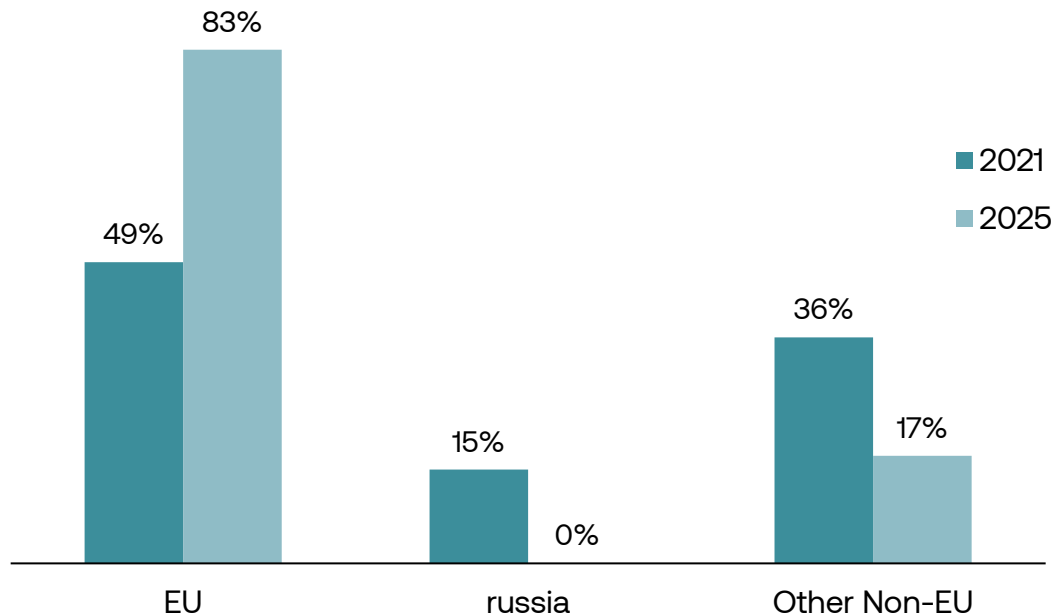
Note: Registration location may not reflect where value is created as CI firms often operate remotely; Data unavailable for some temporarily occupied territories, including Crimea; Kyiv City value exceeds scale, ECoC – European Capital of Culture
Source: State Statistics Service of Ukraine

CI's have pivoted decisively to the EU, an economic shift that mirrors Ukraine's broader reorientation

EU has displaced russia as dominant CI export market, supporting decolonisation...

Top CI Export Destinations

% of Total CI Exports



...with growth across European markets

- 1 Ukraine's CI exports to the EU rose from 48% to 83% of total exports between 2021 and 2025 - a **net increase of \$23.4m** across multiple **European markets**
- 2 The uplift spans **both commercial buyers and diaspora communities**, across EU27 rather than clustered in one or two markets
- 3 UA's creative sector is **already embedded in European supply chains, audiences and institutions** - making the formal political accession a matter of recognition, not transformation

Culture at the frontline, culture in the world

Summary | From frontline anchor to global ambassador, culture is central to Ukraine's recovery and its story



Anchoring frontline communities

- Cultural institutions serve as **community anchors**, keeping people in frontline cities
- Buildings **reinvented** as cultural spaces — theatres, bookstores, museums **operating under bombardment**
- **Displaced people hosted and amplified** through cultural programmes



Reclaiming Ukrainian identity

- **Strong drive for decolonisation** — 57% of music consumed in UA is in Ukrainian, 2x translation apps
- Cultural production creates **tamper-proof records that resist russian distortion**
- Diaspora driving **global demand for Ukrainian culture**, embedding UA identity worldwide



Enabling Ukraine to tell its story abroad

- **~2,500 cultural projects** abroad in year one; **~1M people** at UA exhibitions
- Cultural presence accelerates **EU integration**, embedding Ukraine in European institutions
- Positions **Ukraine as a cultural peer**, not an aid recipient, shifting terms of engagement

Creative industries support frontline regions, serving as community anchors during active conflict



“We decided to stay [in Kharkiv] and we decided consciously to create the space for those, who will be here after us”

- Nina Khyzhna, Theatre Nafta

Note: Photos are of Theatre Nafta in Kharkiv



Kharkiv Literary Museum has been forced to **place its collections in storage**, but continues to **host readings, writers’ residencies and events**



In Kharkiv, the reimagined BookShelter functions as a bookstore and a community hub, bringing people together and **providing a place to gather during blackouts**



Theatre Nafta is one of the few independent theatres still operating in Kharkiv, **staging performances & training emerging practitioners**



Fabrychna 12 has transformed a 120-year-old family home in Chernihiv into a creative hub for the local community - **sustaining cultural life near the frontline**

Culture strengthens social cohesion across the country by integrating displaced UAs & fostering collective belonging



“Traditional culture makes us stronger — it is power from our roots. It connects people.”

- Natalia Zhyzhchenko (Onuka) – Founder, Fabrychna 12



Museum of Terror **hosted a displaced Luhansk museum for two years**, covering housing, re-registration & rebuilding their exhibition programme



In Lviv, **Jam Factory supported frontline regions by hosting displaced people** from areas under threat and **amplifying their voices through contemporary art**



In a town in Chernihiv oblast, liberated after russian occupation, **cultural networks sent 300 books from Lviv to replace the destroyed local library collection**

Strong drive for decolonisation has accelerated the reclamation of culture inside Ukraine and abroad

57%

of music consumed in UA is now Ukrainian-language, up from 33% before the full-scale invasion

2x

increase in apps for translation into Ukrainian (from 84 to 179)

~600K

books distributed to displaced children across Europe



Molodist Film Festival:

has increased the share of UA films in its programme and promoting UA filmmakers internationally



YermilovCentre:

has reclaimed Ukrainian avant-garde heritage and sustaining contemporary cultural production in a frontline city



Jam Factory Art Center:

functions as a cultural space, where revitalise architecture in merged with reinterpreting Ukrainian art

“Many Ukrainian cultural figures were perceived as russian, now we are reclaiming them for Ukraine”

Oleksandr Savchuk – Head,
“Publisher Oleksandr Savchuk”

Internationally, Ukrainian cultural institutions act as informal ambassadors, mobilising global awareness

Cultural institutions have transformed into agents of advocacy, amplifying Ukraine's voice abroad...

~2.5K

cultural projects implemented abroad in the first year of war

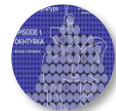
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objects contributed to Europeana

~1M

people attended UA exhibitions abroad

Source: Interviews conducted by TBI



Wounded Culture Project:

Shifted from heritage preservation to documenting wartime experiences, using testimony as an advocacy tool



Ukrainian Book Institute:

Shifted from domestic publishing to a global presence at major book fairs



Pixelated Realities:

Retrained displaced journalists as 3D operators to showcase cult. destruction



Oleksandr Savchuk Publisher:

Has expanded its int'l reach through publishing bilingual books & global platforms (e.g. the Frankfurt Book Fair)

...rendering Ukraine a more assertive actor within global discourse



Sustaining global visibility through continuous presence, ensuring Ukraine is at the top of the int'l discourse



Cultural exchange is generating **durable partnerships**, embedding Ukraine within global ecosystems



Expanding soft power by building recognition and affinity through culture, keeping the war high on int'l agenda

From Oscars to Europeana, UA culture is defining its own story on the world stage as a peer to global cultural leaders

1M+

S.T.A.L.K.E.R. copies sold within 2 days of release

800+

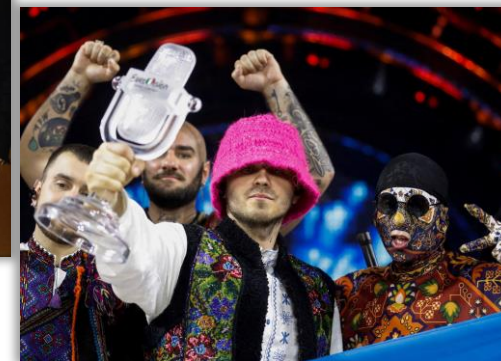
UA books are now translated into multiple languages

190M

people reached via UA cultural programs* in 2022

55

Countries reached by UA cultural events



“We are showing a culture that was hidden for hundreds of years behind the wall of imperialism”

Olena Odynoka – Deputy Director, Ukrainian Book Institute

Source: Ukrainian Book Institute (2025), Ukraine World (2025), UK/Ukraine Season of Culture Publication (2023)

Note: Cultural programs received over 630 media mentions, reaching an audience of 190 million people in both the UK and Ukraine

Cultural activities support Ukraine's diplomatic objectives, including deeper integration with Europe

Every exhibition, publication, and event places Ukraine in the world's consciousness...



Accelerates EU integration by embedding Ukraine in EU cultural infrastructure, signals membership of a shared cultural space



Sustains donor and political support by keeping Ukraine's story human and present in the countries whose backing matters most



Positions Ukraine as a cultural peer, not just a recipient of aid, shifting the terms of international engagement to partnerships

...which translates into tangible support for the Ukrainian culture and creative industries

~€50M

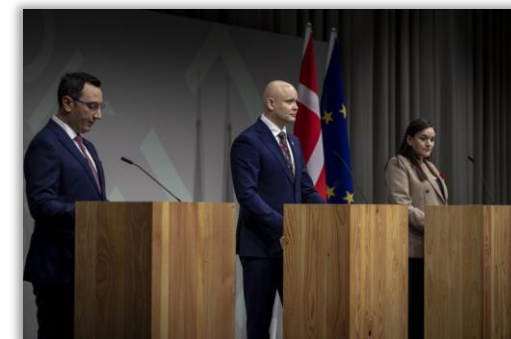
has been committed by the EU to Ukraine's culture since 2022

100+

cooperation projects under Creative Europe programme

28

European partners support UA culture as part of Cultural Resilience Alliance



What Ukraine is building, and how to support it



Creative industries are driving growth and resilience in the world's advanced economies



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- **Outperforms chemicals, energy, and financial services** in GVA
- Since 2007: **federal initiative** w/ annual reporting, sector lead, and innovation programmes

Ukraine has already built a working foundation for creative industries – now it needs to be scaled further


UA's government has recognised the **strategic value of its creative sector**, launching **targeted programmes to support** entrepreneurship and cultural infrastructure




Vlasna Sprava: Grants supporting small businesses, with a dedicated CI chapter. Projected to create 10,000 jobs in 2026




Ukraine Cultural Fund: State grant agency supporting culture & CI's across 7 sectors (~3,000 projects funded)




Ukrainian Book Institute grants: Funding for translation & publication of UA books abroad with ~100 projects in 33 countries



Thousand Spring: Programme launched to fund Ukrainian cultural content (film, music, arts) with 4B UAH



Mecenatstvo reform: Financial compensation mechanism returning 10% to patrons who invest in cultural institutions



CuRe & CRA: €570M+ committed across 28 European partners via the Cultural Resilience Alliance and Culture Recovery programmes

Partners can support Ukraine's cultural sectors – and learn from their experiences – through existing initiatives



Cultural Resilience Alliance (CRA)

What it is

Cultural diplomacy **platform** - **28 partners coordinating support** for Ukraine's cultural sector

Who it's for

Governments, national cultural institutions, foundations, businesses



Equipment for Culture (E4C)

Initiative **providing equipment and operational infrastructure** to UA cultural institutions

Bilateral **donors, businesses, foundations** focused on operational support



House of Europe

EU-funded programme for **culture, education, media, social entrepreneurship**

Ukrainian **cultural institutions, creative professionals, NGOs**



EU4Culture II

EU project supporting **culture as a driver of regional development** in cities across Eastern Partnership

CCS actors & organisations; EU cultural networks and Member State cultural agencies as partners

Appendix

Our approach starts from Ukraine's official definition of CI and adapts it to align with international frameworks

Each sector grouping captures a broad range of activities...

TBI Sector Grouping	Activities Included
Audiovisual	Film & TV; TV broadcasting; Photography
IP-driven tech	Game & Software publishing; Programming; IT consulting
Audio	Sound recording; Radio broadcasting; Musical instruments
Advertising, Marketing & PR	Advertising agencies; Media placement; Public relations; News agencies
Publishing	Books, newspapers, magazines & other print; Translation
Arts & Theatre	Performing/ visual arts, individual arts, theatre, concert hall
Architecture & Design	Architecture; Specialist design (graphic, product & fashion)
Craft Production	Jewellery & similar products; Imitation jewellery
Cultural Heritage	Libraries & archives; Museums
Research & Education	R&D in social sciences & humanities; Cultural education

...with some corresponding limitations in domestic data quality



UA definition includes IT in CI; **we limit IT to IP-driven activities**



This analysis **limits goods to clear cultural or IP-based products**



Digital platform revenues uncaptured; freelance platforms do not appear in official trade statistics



GVA and employment data **excludes temporarily occupied regions**, understating true CI scale

UK's Creative Industries are world leading, with their growth driven by policy consistency and deliberate clustering



Shape & Profile of CIs

- CIs contributed **£145.8b in GVA in 2024**, having **grown 19.7% since 2019** vs. 4.4% for the broader economy
- The sector employs **2.4m workers (~7% of workforce)**
- **IT, software and computing services are ~43% of CI jobs**, with London/ South East having 28% of employment
- The UK is 3rd largest **creative services exporter** globally



Key government interventions

- 1 **Sector-specific tax reliefs:** Creative businesses get cash credits at higher rates than general corporate tax relief
- 2 **Gift Aid & charitable status:** cultural institutions reclaim tax on donations and pay no VAT on admissions
- 3 **IP-friendly commissioning:** public broadcasters must commission from independents & let them keep the IP
- 4 Government **funds creative hubs** across the UK to drive growth beyond London



Key drivers for success

- **Policy consistency across 6 govs over 18 years:** predictability unlocks long-cycle creative investment
- **Deliberate clustering :** strategic choice to build hubs across the UK vs. concentrating in London
- **Long-term investment in talent and skills:** sustained funding for creative HE & conservatoires

Note: DCMS - Department for Culture, Media and Sport;

Source: DCMS, *Creative Industries Sector Plan*; DCMS, *Economic Estimates: GVA 2024 (provisional)*; HMRC, *Creative Industries Statistics*; Arts Council England, *National Portfolio 2023–26* funding data; CIPEC, *National Statistics on the Creative Industries*; UNCTAD, *Creative Economy Outlook 2024*

South Korea has translated sustained state commitment into the world's leading content export industry



Shape & Profile of CIs

- Korean content industry had ~\$112b revenues in 2024 across **11 official sub-sectors**¹
- Content exports reached a record **\$14.1b in 2024**, with heavily concentrated in **gaming (\$8.5b)**
- The sectors employ **~700k workers across 120k firms** (2024) - comparable to employment in automotive (~350k) industries



Key government interventions

- 1 **Public investment funds:** dedicated funds (e.g., **K-Content Fund**) channel direct equity & co-investment into content production
- 2 **Global network of 25 KOCCA business centres** and **42 Cultural Centres across 34 countries** handle export support & market access
- 3 **A talent pipeline and R&D infrastructure** runs through KOCCA-operated academies for gaming, music and content production



Key drivers for success

- **Institutional architecture:** MCST (est. 1994) & KOCCA (est. 2009) have survived 5 administrations unchanged
- **5-year Cultural Promotion Plans** bridge elections, with new govts. adopting predecessors' plans
- **Cultural diplomacy embedded in foreign policy:** K-pop creators deployed as cultural envoys

Germany's CI's success is anchored by a professional approach to sector management, with economic impact first



Shape & Profile of CIs

- CI sectors generated **€123.2b GVA (2023)** - a contribution larger than chemicals, energy or financial services
- CIs employ **~2m workers** (4% of workforce, comparable to pharmaceuticals industries)
- Activity spans **11 official sub-markets¹**, dominated by **Software/Games** and **design**



Key government interventions

- 1 **Cultural infra. subsidy:** Public spending on culture is **~€15b/year** (among the highest per-capita globally)
- 2 **Sector monitoring & SME advisory:** a federal monitoring report tracks sectors, while a competence centre runs advisory services for SMEs
- 3 TV production incentives are offered at **30% of production costs**, with total federal film support doubling from 2026



Key drivers for success

- **Federalism as design choice:** Culture is a state-level competency, creating competing cultural economies
- **Treating culture as a measurable industry:** Germany professionalises sector mgmt., making the sector legible to federal economic policy.

Note: music, books, art market, film, broadcasting, performing arts, design, architecture, press, advertising, software/games

Source: Federal Ministry of Economic Affairs / Prognos, *Monitoring Report on Cultural and Creative Industries 2024*; Federal Statistical Office, *Cultural Finance Report 2024*; German Federal Film Board (FFA), *DFFF and GMPF 2024 at a Glance*

Deep dives: Case studies

Wounded Culture Project documents UA's cultural frontline, preserving testimony for future generations

Cultural support to **frontline regions and heritage preservation**

Executive Snapshot

Captures **lived experiences of cultural workers during war**. Launched a week after the full-scale invasion, it **documents resistance through firsthand accounts**

Core Activities



Interviews & Exhibitions



Digital edu. courses



VR reconstruction



Peer support

“People come to the museum as part of their life, as therapy, as community”

Founded | 2022

Location | Lviv

Type of institution | Civil society

Contribution to Ukraine's recovery

- **50+ institutions documented** across Ukraine
- **3 full field expeditions** (Odesa)
- **1 displaced institution** hosted for 2 years



Building Pride: Oral histories & reconstructions create tamper-proof records of Ukrainian culture



Rallying International Support: Exhibitions in Cologne generated visibility, with Ukrainian cultural resilience expertise now readily sought



Supporting Dignity & Community Wellbeing: Field expeditions provided isolated cultural workers with visibility and solidarity

Pixelated Realities documents heritage through 3D digitisation, reaching ~1 million people across 55 countries

Digital **preservation of Ukrainian cultural heritage**

Founded |
2015

Location |
Odesa

Type of institution |
Civil society

Executive Snapshot

Pixelated Realities create **3D digital records of UA cultural heritage**. Since 2022, they **document wartime damage** & train displaced journalists as operators

Contribution to Ukraine's recovery

- **~1 million people reached** across 55 countries
- **44 objects** contributed to **Europeana**
- **Exhibitions** at Harvard, Tokyo, Yokohama, Germany, Margate

Core Activities



3D
photogrammetric
documentation



International
exhibitions &
academic
partnerships



Building Pride: 3D models with verified photography create tamper-proof records



Rallying International Support: Directly facilitated with EU. Ukraine is now a pilot contributor to Europeana as a result



Supporting Dignity & Community Wellbeing: When the Scovoroda Museum was damaged, pre-destruction digital records enabled the community to begin rebuilding what was lost

"Without identity, we do not feel like ourselves. We do not feel at home"

Ukrainian Book Institute places Ukrainian literature in libraries and publishing houses worldwide

Promoting UA literature internationally and strengthening the domestic book market

Founded | 2016

Location | Kyiv

Type of institution | State institution

Executive Snapshot

UBI is Ukraine's **primary state body** for **book publishing policy, market development**, and international **literary promotion**

Contribution to Ukraine's recovery

- **326 translations published in 36 languages**
- **~600,000 books distributed** to displaced children across Europe
- **1,400+ public libraries upgraded**

Core Activities



Translate Ukraine



Books w/out borders



Tales of Ukraine



Reading promotion



Building Pride: The removal of russian books created space for UA authors with book festivals growing during the war



Rallying International Support: At Bologna, two weeks after the invasion, a stand with the message "Stand with Ukraine" sparked solidarity



Supporting Dignity & Community Wellbeing: Bilingual books distributed to displaced children preserve Ukrainian language and identity abroad

"A book is a shelter for the brain... Access to literature is an effective method of therapy for a person forced to live in a harsh reality"

Fabrychna 12 revives traditional UA culture, blending folk traditions with contemporary creative practice

Cultural placemaking and heritage revival
in Chernihiv

Founded | 2022

Location |
Chernihiv

Type of institution |
Cultural space

Executive Snapshot

Community cultural space in Chernihiv
**preserving regional folk heritage,
traditional instruments, and cultural
placemaking** in a city under active conflict

Contribution to Ukraine's recovery

- **Khustka** is the first professional authentic Chernihiv regional song ensemble
- **"This is My City" volunteer fund** raised significant sums from Fabrychna 12

Core Activities



Singing workshops



3D printing of
instruments



Podcast series



Building Pride: Demand for UA self-identification grew immediately and the space filled this gap



Rallying International Support: Through ONUKA's int'l profile, Fabrychna 12 brings Ukrainian traditional music to global stages



Supporting Dignity & Community Wellbeing: Fabrychna 12 has become a gathering point for Chernihiv's cultural community, volunteers, artists, musicians, researchers

"People come to the museum as part of their life, as therapy, as community"

Suspilne safeguards decades of audiovisual heritage, digitising 70,000 film reels to preserve cultural memory

Public service **media and digital preservation** of UA's audiovisual heritage

Founded | 2017

Location | Lviv

Type of institution | State Institution

Executive Snapshot

A **public digital archive** of audiovisual content spanning decades of UA history. Since 2022 priority is the **digitisation of film reels at risk of physical destruction**

Contribution to Ukraine's recovery

- **~70,000 film reels at risk**, being digitised
- Archive spans **content from the 1950s onwards**
- **Int'l partners** include JICA, NHK, FIAT/IFTA

Core Activities



Public digital archive



Systematic digitization



Building Pride: Makes decades of UA audiovisual heritage public, reinforcing national memory and cultural continuity



Rallying International Support: International partnerships have drawn significant institutional support to Ukrainian archive preservation



Supporting Dignity & Community Wellbeing: Through publicly accessible digitised records, gives UA's access to a shared cultural memory

"We document testimonies of war so that the truth endures. Because true recovery begins not with bricks, but with identity."

Molodist Film Festival brings Ukrainian cinema to the world stage, screening 150+ films annually

UA's oldest international film festival, supporting emerging filmmakers

Founded | 1970

Location | Kyiv

Type of institution | Cultural Festival

Executive Snapshot

UA's international film festival accredited by FIAPF. **Focused on emerging and debut filmmakers**, it screens 150+ films annually & maintains a **Ukrainian national competition**

Contribution to Ukraine's recovery

- **2,000–2,500 film submissions** received annually
- **~150 films screened per edition since 2023**
- **Permanent UA programme at Mezipatra festival** (Prague and Brno) since 2022

Core Activities



Int'l & National Competition



Masterclasses & networking for emerging filmmakers

"There is a lot of division in society, but going to a cinema, going to a festival - it's a very communal experience. It unites people."



Building Pride: Since 2022, interest in UA cultural products has surged, with audiences actively rediscovering their own cinema & heritage



Rallying International Support: Exhibitions in Cologne generated visibility, with Ukrainian cultural resilience expertise now readily sought



Supporting Dignity & Community Wellbeing: For UA audiences, watching films together acts as a way of processing shared trauma

Yermilov Centre sustains contemporary art practice in a frontline city, providing a space for reflection and dialogue

Contemporary art centre in frontline city

Founded | 2013

Location |
Kharkiv

Type of institution |
Cultural institution

Executive Snapshot

Established with Kharkiv National University, it operates as a **multifunctional platform for contemporary art, international exchange, and cultural dialogue**

Core Activities



Exhibitions



Edu.
programmes



Artist residencies

“Thanks to the exhibitions and the messages that our projects carry, we influence important aspects of modern society”

Contribution to Ukraine's recovery

- **"Personnel" exhibition 2023 brought together 17 Kharkiv artists** drawing on their own wartime experiences



Building Pride: Continued operations is a statement about the distinctiveness of Kharkiv's artistic heritage, independent of Russian influence



Rallying International Support: Int'l artist residencies and cross-disciplinary exchange has built durable connections



Supporting Dignity & Community Wellbeing: Provides residents with a public space for reflection, discussion & collective processing

Jam Factory Art Center supports artists, veterans, and displaced communities during wartime

Multidisciplinary art centre **fostering critical dialogue & community cohesion**

Founded | 2023

Location | Lviv

Type of institution | Civil society

Executive Snapshot

Operating across visual art, theatre, music, cinema, and education, the centre **opens its doors to displaced people, artists relocated from conflict zones & veterans**

Contribution to Ukraine's recovery

- **EU community building programme**
- **Orientation programme for artists** relocating to Lviv

Core Activities



Contemporary art Exhibitions



Edu. initiatives



Performing arts



Artist residencies



Building Pride: Contemporary art creates space for dialogue on topics that are difficult to process



Rallying International Support: Active int'l exhibition programme throughout the war, connecting Ukrainian artists with global networks



Supporting Dignity & Community Wellbeing: A theatre play created with veterans drew the largest audience in the Centre's history

“Art exists because life is not enough. Art gives you something to think about more broadly, and to keep going”

Book Shelter (KnyhoUkryttia) rebuilds cultural memory through restoring intellectual heritage

Independent **publisher and cultural space** in frontline Kharkiv

Founded | 2022

Location | Kharkiv

Type of institution | Cultural space

Executive Snapshot

Oleksandr Savchuk **founded his publishing house** in 2010 **to restore suppressed UA cultural heritage**. The book shelter was founded as a bookshop-café & event venue

Contribution to Ukraine's recovery

- Core readership estimated at **~1,000 readers**
- Deliberately **analogue space sustaining physical continuity of memory**

Core Activities



Publishing programme



Lectures & book club



Bookshop-café / physical shelter



Archival recovery

"Our goal is to showcase Ukrainian heritage, books that restore what was taken and give people something to hold onto."



Building Pride: Publishing work is explicit for restoring intellectuals, architects, and artists whose names were erased from discourse



Rallying International Support: Publishing model with an int'l based designer demonstrates how cultural production has adapted to wartime



Supporting Dignity & Community Wellbeing: Functioning, as an institution that serves a social and community function, the bookshop is a space, where new identity is actively expressed

Kharkiv Literary Museum safeguards Ukraine's literary heritage from the frontline, preserving 30,000+ artifacts

Literary heritage institution

Founded | 2022

Location |
Kharkiv

Type of institution |
State Institution

Executive Snapshot

The museum holds **over 30,000 artifacts representing Ukrainian literary history** from the Ukraine's Renaissance to contemporary writers

Core Activities



Preservation and display



Edu. programmes



Exhibitions



Cultural residencies

"We packed museum objects in cardboard boxes labelled 'delivery of the future.' Literally every step seemed to shout with symbolism"

Contribution to Ukraine's recovery

- **30,000+ artifacts** incl. rare editions
- **Graphic novel "In the Name of the City"** published February 2025
- **Residency programme** exploring local art



Building Pride: Core mission is reframing memory, recovering voices that were erased



Rallying International Support: The residency brings together cultural practitioners to explore what culture of the future could look like



Supporting Dignity & Community Wellbeing: Created programming specifically for young people searching for identity

Nafta Theatre uses performance as a tool of resistance, community cohesion, and cultural diplomacy

Independent experimental theatre

Founded | 2018

Location |
Kharkiv

Type of institution |
Civil society

Executive Snapshot

Performances on postcolonialism, war, and identity; runs training programmes and **tours internationally** positioning UA theatre in the global conversations

Contribution to Ukraine's recovery

- **Performed at Edinburgh Festival Fringe** with "Someone Like Me"
- **Trained two cohorts** of lighting and sound designers

Core Activities



Theatrical productions



Int'l tours



Nafta labs



Community building

"We decided to stay and create a space for us and for the people who will be here after us. If everyone leaves, then who will remain?"



Building Pride: Showcases stories and identities on stage to reflect community experiences



Rallying International Support: Brought UA narratives to international audiences through performance - humanising the story



Supporting Dignity & Community Wellbeing: Through the Nafta labs programme, Nafta is investing in the next gen. of theatre practitioners to ensure the sector survives