

## TANULMÁNYOK /ARTICLES

### The presence and performance of cultural and creative industries in rural regions

#### *A kreatív és kulturális iparágak megjelenése és teljesítménye a vidéki térségekben*

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**ABSTRACT:** This paper examines the presence and performance of cultural and creative industries (CCIs) in rural regions, specifically using the example of the Vysočina Region, and compares it with other regions in the Czech Republic. The main objective is to reflect on the potential and limitations of CCIs outside metropolitan centres and to contribute to the discussion on the spatial specifics of the culture-based economy. The text is based on the assumption that the role of CCIs in the economic and social development of rural regions is often marginalised, even though it can be crucial for diversifying the local economy and strengthening community identity. The study uses a combination of methodological approaches and data sources, in particular mapping of CCI entities in the Vysočina Region, analysis of employment and the economic performance of individual industries. One important part is a comparison of the economic performance of CCIs within three different types of regions – metropolitan, old industrial, and other regions. The structure of the text includes an introductory theoretical section devoted to the spatial organisation of CCIs, an overview of data sources and methods of processing them, and an analytical section evaluating the presence and performance of CCIs. The two summary measures—structural importance and economic performance of CCIs—were constructed as composite indicators based on multiple sub-indices (e.g., employment coefficients, specialisation indices, average wages, revenues, and added value).



The main results largely confirm the theoretical findings, i.e. they identify a significant orientation of CCIs located in rural types of regions towards cultural and historical heritage and an overall relatively stable structural balance. At the same time, however, the expected overall lower economic performance of CCIs in rural regions is confirmed. On the other hand, it has been shown that certain industries (such as Books/ Printing and Performing Arts) consistently perform above expectations and their position is more significant in rural regions than in other types of areas. The text also suggests the causes and possible implications of this situation. The study points to the need for a regionally sensitive approach to cultural policy, emphasises the importance of so-called second-order cultural infrastructure, and recommends supporting locally based forms of cultural work with an emphasis on community cohesion and sustainable development. Finally, issues related to the effectiveness of public investment in the CCI segment and potential tensions that may arise in the case of merely mechanically adopting support concepts and instruments from other types of territories are also discussed.

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**KULCSSZAVAK:** kultúra és kreatív iparágak; vidéki régiók; foglalkoztatás; gazdasági teljesítmény; Csehország

**ABSZTRAKT:** Jelen tanulmány a kulturális és kreatív iparágak (KKI) jelenlétét és teljesítményét vizsgálja vidéki térségekben, különösen a Vysočina régió példáján, összehasonlítva azt a Cseh Köztársaság más régióival. A fő cél annak bemutatása, hogy milyen lehetőségek és korlátok jellemzik a KKI-kat a nagyvárosi központokon kívül, valamint hozzájárulás a kultúraalapú gazdaság térbeli sajátosságairól szóló diskurzushoz. A szöveg abból a feltételezésből indul ki, hogy a KKI-k szerepe a vidéki térségek gazdasági és társadalmi fejlődésében gyakran marginalizált, annak ellenére, hogy szerepe a helyi gazdaság diverzifikálásában és a közösségi identitás erősítésében jelentős.

A vizsgálat többféle adatforrást és módszertani megközelítést alkalmaz, többek között a Vysočina régióban működő KKI-szereplők feltérképezését, valamint a foglalkoztatás és az egyes ágazatok gazdasági teljesítményének elemzését. Fontos része a KKI-k gazdasági teljesítményének összehasonlítása három különböző régiótípusban – nagyvárosi, régi ipari és egyéb régiókban.

A tanulmány egy bevezető, elméleti résszel indul, amely a KKI-k térbeli szerveződésével foglalkozik. Ezt követi az adatforrások és a feldolgozás módszereinek áttekintése, majd egy elemző fejezet a KKI-k jelenlétének és teljesítményének értékelésével. A két összegző mutató – a KKI-k strukturális jelentősége és gazdasági teljesítménye – több almérőszám (például foglalkoztatási együttthatók, specializációs indexek, átlagbérek, bevételek és hozzáadott érték) alapján összeállított kompozit indikátorként került kialakításra.

A főbb eredmények nagyrészt megerősítik az elméleti megállapításokat, vagyis kimutatják, hogy a vidéki régiótípusokban működő KKI-k jelentős mértékben a kulturális és történeti örökségre orientálódnak, és összességében viszonylag stabil strukturális egyensúlyt mutatnak. Ugyanakkor igazolódik a vidéki térségekben működő KKI-k várhatóan alacsonyabb gazdasági teljesítménye is.

*Másfelől azonban kimutatható, hogy bizonyos ágazatok (például a könyvkiadás/nyomdaipar és az előadóművészetek) tartósan a várakozások felett teljesítenek, és szerepük a vidéki régiókban jelentősebb, mint más térségtípusokban.*

*A tanulmány feltárja e helyzet okait és lehetséges következményeit is. Rámutat a kulturális politika térben érzékeny megközelítésének szükségességére, hangsúlyozza az úgynevezett másodlagos kulturális infrastruktúra jelentőségét, és javasolja a helyi beágyazottságú kulturális tevékenységek támogatását a közösségi kohézió és a fenntartható fejlődés erősítése érdekében. Végül kitér a KKI-szektorba irányuló közberuházások hatékonyságával kapcsolatos kérdésekre, valamint azokra a lehetséges feszültségekre is, amelyek más térségtípusok támogatási koncepcióinak és eszközeinek mechanikus átvétele esetén merülhetnek fel.*

## Introduction

Cultural and creative industries are now seen as an important part of an economy based on knowledge, innovation and creativity. CCIs are among the „frontrunners” of the restructuring of social and economic forms of production (Krätke 2002), and academic and political discourse attributes growing importance to them, particularly in connection with the post-industrial transformation of economies and efforts to diversify the sectoral structure of a region (OECD 2025; Hesmondhalgh 2013; UNCTAD 2010). CCIs encompass a wide range of activities that combine cultural values, creative activities and economic production. Scott (2000) points to the interconnection between the cultural geography of place and the economic geography of production and captures how CCIs are highly differentiated and diversely categorisable: they include both traditional manufacturing industries whose production is oriented towards the creation of tangible products (clothing, furniture, jewellery), and, on the other hand, industries that transform information or ideas (symbols) into intangible final outputs (marketing, advertising, theatre), as well as products of a hybrid nature (music recording, publishing). The labour markets associated with these industries are extremely competitive, with many employees working part-time and the workforce (mostly highly skilled) organised around temporary projects (Grabher 2002). Companies in the creative industries are part of a highly volatile market with a high degree of risk and competition.

The subject of expert discussion is the evaluation of the contribution of CCIs to the development of the economy, society and individual regions. It must be said that the contribution of CCIs cannot be reduced solely to quantitative indicators such as contribution to GDP or number of jobs, nor can some of the simplified practical implications for supporting CCIs, as originally published in the works of R. Florida (2002) and others (for more details, see Peck 2005; Pratt 2008). In addition to economic effects, these industries also generate and influence broader social benefits, such as cultural participation, community cohesion, quality of public spaces, and innovative thinking in public administration and business (Throsby 2001). However, these aspects are difficult to define and quantify. This is related to many problematic aspects of measuring the performance and impact of CCIs.

Although there are a growing number of diverse attempts to map, quantify and evaluate benefits, such as the UNESCO Framework for Cultural Statistics (see 2025 version), methodological difficulties remain – how to quantify creativity, how to separate cultural activities from other types of economic activity that use creativity (creative industries), how to assess informal and community initiatives that are not an explicit part of the market economy, etc. (Healy 2002; Galloway, Dunlop 2007). In addition, aggregated statistics often obscure important regional and sectoral specifics, which can lead to misleading conclusions about the actual performance and contribution of CCIs. At the same time, the considerable heterogeneity of the industry cannot be overlooked – from highly commercial, technologically advanced and economically progressive industries (e.g. the video game industry) to cultural production with a low market return (e.g. independent theatre, literary creation). CCIs can therefore create a large disproportion between economic and social development, with spatial and sectoral differences in their location, performance and effects on the labour market (Oakley 2006). This diversity complicates the creation of effective public policies (Cunningham, Higgs 2009) and places considerable demands on truly effective, beneficial and relevant support strategies (Pratt 2005).

Despite the methodological and practical challenges described above, there is relative consensus in professional literature that cultural and creative industries play an important role in economic and social development, particularly in the context of large cities and metropolitan areas. They are associated with the urban environment, attracting talent, innovation and increasing the competitiveness of cities (Florida 2005; Glaeser 2011). But what if we move beyond these cultural-economic centres and exposed regions? What is the role of CCIs in rural regions with a predominantly rural character and rural settlement patterns? What is the position of CCIs in areas where there is no dense network of institutions, creative communities or significant demand for cultural content? In principle, we already have the following knowledge (e.g., Silva, Marques, Galvão 2024; Ženka, Slach 2018) that CCIs are less represented in rural or peripheral regions, both in absolute and relative terms, their economic structure is generally more diversified, we see a lower degree of specialization and, logically, in relation to the nature of the environment, a lower degree of agglomeration economies. We know much less about the details of their structure and character. Questions remain, in particular as to whether CCIs in rural areas really do create significant numbers of jobs, in what specific activities and in what types of industries in this environment. Do these aspects differ in different types of regions? Is it even possible that CCIs are more concentrated in rural regions or that rural regions specialise in them? Do the parameters of the economic performance of CCIs differ in different types of regions, for example when comparing a major metropolitan area with a typical rural example? Can we even find some CCIs in rural regions that are relatively more economically performing than the same sectors in metropolitan areas?

This study contributes to the advancement of research on CCIs on three key levels. Theoretically, it deepens the understanding of the spatial differentiation of CCIs by highlighting the distinct characteristics and dynamics of rural regions, which are often marginalised in the discourse dominated by metropolitan perspectives. Methodologically, the paper introduces a comparative framework that integrates structural and economic performance indicators across different regional typologies, providing a replicable model for future regional CCIs analysis. From a policy standpoint, the study offers recommendations for regionally sensitive cultural policy, emphasising the importance of second-order infrastructure, local facilitators, and support mechanisms tailored to the realities of non-metropolitan regions.

### **Spatial organisation of CCIs**

The spatial structure of cultural and creative industries (CCIs) is not random. A number of studies confirm that the location preferences of these industries are influenced by a combination of economic, institutional and cultural factors, which are reflected in their uneven geographical distribution (Lazzeretti, Boix, Capone 2008; Boix, Hervás-Oliver, De Miguel-Molina 2015). Theoretical approaches to the spatial organisation of CCIs emphasise three main dimensions: urbanisation economies, location economies and cultural-social context. The first of these, urbanisation economies, is based on the diversification of the sectoral structure, the labour market, infrastructure accessibility and institutional density. In an urban environment, this creates the conditions for synergies between different actors, reduced transaction costs and support for innovation processes (Lorenzen, Frederiksen 2008). The second dimension is represented by the classic concept of localisation economies resulting from specialisation, which facilitates the sharing of specific knowledge and promotes efficiency and productivity (Branzanti 2015). The third dimension is the cultural and social context of a given location – i.e. historical heritage, landscape and architectural values, but also so-called soft factors of development such as the atmosphere and aesthetics of the environment and civic amenities (Slach, Rumpel, Koutský 2013; Grodach 2017; Suchacek 2019). Similarly, we can say that the proximity, concentration and intensity of actors and activities leads to increased availability of skilled labour and services. This is the basis for business efficiency and flexibility, knowledge spillovers, formal and informal exchanges of information between entities, innovation and adaptation to change (Asheim, Boschma, Cooke 2011). Last but not least, cultural diversity and openness are important, as they attract the creative class and create conditions for cultural activities and entrepreneurial assets based on creativity (Florida 2002). The increased localisation of cultural infrastructure in the form of galleries, theatres, studios, co-working spaces

and business incubators provides both a base for creation and a space for presentation, enabling the emergence of so-called creative quarters, which can become a catalyst for broader urban regeneration (Evans 2009).

In line with the above, we can say that CCIs tend to be located in urban environments and in regions that are overall significant and attractive. CCIs can thus be found in metropolitan regions (Grodach et al. 2014; Boix, Hervás-Oliver, De Miguel-Molina 2015), their centres or inner cities (Dovey, Wood 2015) or in the hinterland of metropolises (Felton, Collis, Graham 2010; Gregory, Rogerson 2018). In metropolitan regions, CCIs are usually part of broader urban innovation ecosystems – they benefit from the availability of talent, university facilities, international networks and cultural infrastructure (Boix, Hervás-Oliver, De Miguel-Molina 2015). The inner parts of cities are mainly home to smaller entities focused on design, media, architecture or performing arts, while the metropolitan hinterland is home to creative activities focused more on craft production, local markets and cultural entrepreneurship (Felton, Collis, Graham 2010).

### **CCIs in rural regions**

While research into cultural and creative industries (CCIs) has long been dominated by a metropolitan perspective, much less attention has been paid to their function in smaller towns (Jayne et al. 2010) or rural and peripheral types of regions (Bell, Jayne 2010; Escalona-Orcao et al. 2016) – i.e. areas characterised by lower population density, weaker infrastructure, limited access to cultural institutions and lower institutional capacity. Silva, Marques, Galvao (2024) point to the diverse use of terms describing the peripheral nature of the territory and propose the consensual term „low density areas”. Nevertheless, it is precisely these places that make up a significant part of the geographical space and can play a key role in the diversification of the cultural economy, provided that suitable conditions for their development are created. Comunian, Chapain, Clifton (2010) state that in the case of creative industries, the spatial pattern of their location is much more complex; they can also be found in smaller towns and rural areas, mainly due to a suitable combination of local infrastructure, governance, soft infrastructure and markets.

Recent discussions on creative ecosystems and distributed creative networks in rural areas emphasize the need to research not only the initial motives for the presence of CCI in this type of area, but also to analyse the profiles of their representatives and, in particular, to monitor the factors contributing to their long-term establishment and stability (Townsend et al. 2017), which may be „more notorious for various reasons” in these areas (Silva, Marques, Galvao 2024, 6051.). In this context, however, it should be noted that our text focuses primarily on the initial debate associated with the initial

analysis of the presence of CCIs in the territory and their economic performance. The following interpretations, which focus more on the context and internal relations, should be part of follow-up research.

One of the main questions associated with CCIs in rural areas is whether and how these industries contribute to job creation. Research suggests that specific segments are active in certain types of rural areas, such as craft production, artistic creation, cultural tourism, local media, heritage preservation, and community culture (Gibson 2010; Duxbury 2021). These activities often create job opportunities, especially for people with ties to the area, outside the standard labour market – including women, seniors, and cultural entrepreneurs in hybrid professions. CCIs in peripheral regions also often take the form of micro-enterprises, leisure activities, or informal initiatives, which, although not included in official statistics, have a significant social and cultural impact. Cultural and creative activities here tend to be linked to the local community, memory and landscape, which distinguishes them from metropolitan communities (Balfour, Fortunato, Alter). The symbolic and cultural capital of the area plays an important role in this – the presence of historical monuments, landscape values, cultural traditions or local brands. An important condition for the successful functioning of CCIs in peripheral regions is the existence of so-called second-order cultural infrastructure – small galleries, libraries, cultural centres, creative workshops, co-working spaces or community centres that serve as a base for cultural production and consumption (Duxbury, Campbell 2009). Furthermore, the presence of cultural facilitators – individuals, associations or small organisations that connect various actors and ensure the transfer of knowledge, finance and inspiration from the external environment – is crucial.

Nevertheless, cultural and creative industries in peripheral regions face a number of barriers. These include low levels of support from public institutions, weak cultural policy at a regional level, limited funding, a lack of educational and professional networks, and a small domestic market (Bell, Jayne 2010; Cicerone, Crociata, Mantegazzi 2021; Viganò, England, Comunian 2023). Another significant problem is brain drain – young, creative people often leave to study or work in larger cities, from which they rarely return. Given these specificities, it is essential to understand the development of CCIs in peripheral regions as a qualitatively different process than in centres. It is not just a matter of reproducing metropolitan models, but of creating locally rooted forms of cultural production that are adapted to local resources, needs and identity. This context requires a regionally sensitive approach that combines economic logic with cultural planning, community initiatives and sustainable development.

Successful strategies for developing cultural and creative industries (CCIs) in peripheral regions differ fundamentally from metropolitan models – they do not rely on agglomeration effects or competitiveness based on the quantity of actors, but build on the specific qualities of a place and its ability to activate local

resources. This approach, known as *the place-based approach*, is based on the assumption that values are linked to a specific territorial context, which shapes their meaning, acceptance and development potential (Barca, McCann, Rodríguez-Pose 2012). In rural areas, this approach is based on several key pillars. These are primarily the cultural landscape and cultural heritage as a source of inspiration and authenticity – local content in the form of unique landscape features, historic buildings or elements of industrial heritage provide a narrative and aesthetic framework for creative activities (Ray 1998). Cultural events, festivals set in listed sites or cultural trails linking natural and cultural heritage can also be an effective platform for cultural consumption and production. The place-based approach is very important – symbolic, historical or emotional stories associated with a location help to create cultural identity and also serve as creative content (Richards, Wilson 2006) – as is community spirit – strong local ties, participation and cooperation between residents, which compensate for the absence of formal structures. The community dimension is particularly important for cultural sustainability: public involvement in co-creating cultural content increases its legitimacy and relevance (Imperiale, Vanclay 2016). Last but not least, we see digital technologies as a tool for overcoming spatial isolation – the use of social media, online platforms, e-commerce and digital tools enables cultural and creative actors to reach global audiences and markets, even though they operate in geographically remote locations (Gibson 2014).

In summary, cultural and creative activities in rural regions form a diverse and adaptive ecosystem based on local conditions and opportunities. Their strength lies in their ability to combine cultural values with community cohesion, economic sustainability and environmental context – in other words, something that cannot be easily replicated in other areas. In many cases, they are a pillar of economic diversification in the local economy (Lazzeretti, Capone, Boix 2012; Pato, Teixeira 2018). In terms of economic and entrepreneurial activities, we can expect the monetisation of cultural heritage and culture-based tourism, such as the operation of museums, guide services, historical reconstructions, themed festivals or performances of folklore and ethnographic traditions, etc. Furthermore, there are traditional and artistic crafts (Bell, Jayne 2010). These include, for example, ceramics, glassmaking, weaving, blacksmithing, woodcarving or the manufacture of musical instruments – activities that are based on historical production processes and are closely linked to the material culture of a given place. Another typical element is community and independent cultural activities – from amateur theatre groups and choirs to art workshops and author readings. This work usually takes place in cultural centres, libraries, small galleries or community centres. Its importance lies not only in its cultural offering, but also in its ability to strengthen local identity and social cohesion (Duxbury, Campbell 2009; Balfour, Fortunato, Alter 2018). The importance of creative services such as graphic design, digital illustration, advertising and audiovisual content production is also growing. These

activities are often carried out as micro-enterprises or freelance activities, targeting local clients, the non-profit sector or public institutions. The advantages are lower initial capital requirements and the possibility of working remotely, but these activities may nevertheless encounter limitations in terms of networks, financing and professional support.

### **Data, methods and geographical dimension of the research**

CCIs can be understood and analysed in a diverse range of ways across many economic sectors and activities. Our study is based on the international typology published in the Study on the Economy of Culture<sup>1</sup> in Europe (European Commission 2006). This three-sector classification has been slightly modified by NIPOS (National Information and Advisory Centre for Culture) to better reflect the reality in the Czech Republic and is commonly used in CZSO publications (CZSO 2023). Therefore, below we generally understand CCI as a combination of the traditional and artistic sector, the audio-visual and media sector, and the creative sector, which includes the industries of architecture, advertising, and design.

The data used in this text is based on two basic sources, or methods of data collection. For the first part of the analysis, which focuses on presenting the presence of more or less the entire CCIs sector in the monitored territory, the outputs from the mapping of entities falling under CCIs carried out in the Vysočina Region in 2023 and 2024 are used. The data was generated in connection with CCIs mapping projects carried out in all regions of the Czech Republic in 2023–2024 in connection with a call announced as part of the National Recovery Programme.<sup>1</sup> In the case of the Vysočina Region, the mapping and verification of data provided by the Czech Statistical Office (CSO) was carried out using internet searches, e-mail surveys, structured interviews and questionnaire surveys. The mapping verified more than 6,000 entities provided by the CSO, of which 2,388 were classified into one of the sub-industries of CCIs based on their activities (i.e. approximately 40%).

The second part of this text presents and compares data on employment and economic performance of individual Statistical Classification of Economic Activities in the European Community (NACE) areas in different types of regions, which were provided in aggregated form at the level of individual NACE areas and regions by the CSO for 2023. However, unlike the above-mentioned set of entities (2,388 entities for the Vysočina Region), the aggregated data does not include data on entities classified as public sector (e.g. national cultural monuments, monuments financed by cities or regions, theatres, primary or secondary art schools, associations financially supported by more than half of public administration organisations, etc.). These are therefore only commercial entities in private or foreign ownership. On the other hand, the CSO also included in the aggregation those companies and self-employed persons for

which it was not possible to obtain any information during the mapping process in the regions, but whose main economic activity (according to CZ-NACE listed in the Register of Economic Entities) was in one of the CCIs. Due to further ambiguities or the negligible representation of certain CCIs in the Vysočina Region, for which no information was provided as it would have been individual data, the CCIs categories „Arts and Crafts”, „Design”, „Television”, „Radio”, „Video Games” and „Film and Video” were omitted from the following analysis. Due to the low number of entities, the categories of „Art Education” and „Music” were combined under the category „Other” in the tables. After this reduction, the number of entities included in the analysis for the Vysočina Region decreased to 2,082.

The comparative analysis tracking employment and economic performance of selected industries of the commercial sphere of CCIs is based on the presentation of two summary indicators. The first, a summary indicator *of the structural importance of individual CCIs in the regions*, combines three commonly used sub-indices in regional sectoral employment analysis:

- employment coefficient –  $EC_{ij} = (E_{ij}/E_j) * 100$  (%), where  $E_{ij}$  – number of people employed in the  $i$ -th given industry in the  $j$ -th region,  $E_j$  – total number of CCIs employed in the  $j$ -th region. This figure indicates the share of a given industry in total CCIs employment in the region. It measures the internal importance of a given industry within the overall CCIs sector in the region;
- specialisation index –  $SI_{ij} = (E_{ij}/E_j)/(E_i/E)$ , where  $E_{ij}$  is employment in the  $i$ -th industry and in the  $j$ -th region,  $E_j$  is total employment in the region,  $E_i$  is employment in the  $i$ -th industry in the higher territorial unit (the Czech Republic) and  $E$  is total employment in the higher territorial unit (the Czech Republic). In other words, it is the ratio of employment coefficients in a given CCIs industry in a selected territory and in the Czech Republic. It expresses the degree of focus of a given region on a specific industry in comparison with the national average;
- concentration index –  $CI_j = EC_{ij}/KO_j$ , where  $EC_{ij}$  is the employment coefficient (see above) and  $PC_j$  is the population coefficient:
  - $PC_j = (PO_j/O) * 100$  (%), where  $PO_j$  is the population of the  $j$ th region,  $O$  is the total population (the whole of the Czech Republic). The figure indicates what percentage of the total population lives in the given region.

The concentration index then expresses the intensity of the presence of a given industry in the region in relation to the number of inhabitants, i.e. its demographically related proportionality.

The second, summary indicator *of the economic performance of CCIs in the regions* integrates four basic sub-indices:

- average gross monthly wage per full-time equivalent – wages paid by employers to employees on the payroll, including bonuses, wage supplements, remuneration, wage compensation and other wage components, but excluding other personnel costs (e.g. severance pay, bonuses provided based on agreements concluded outside the employment relationship, bonuses paid to members of company and cooperative bodies from costs and profits) per average number of employees converted to full-time equivalents (in thousands of CZK);
- revenue per entity – revenue from the sale of products and services per enterprise that was active for at least part of 2023;
- income per entity – income other than sales includes, for example, income from the rental of movable or immovable property;
- accounting added value (AAV) per entity – sales of products, services and goods reduced by intermediate consumption, change in inventories from own activities and capitalisation.<sup>2</sup>

Each of these variables captures a different aspect of the economic functioning of a given industry – from individual remuneration (wages) to the performance of entities (sales and revenues) to their real contribution to the creation of economic value (AAV). Together, they form a multidimensional profile of the industry, which makes it possible to assess the economic strength or weakness of a given CCIs area. The sub-indices are commonly used, but their combined use in the concept of both indicators is unique and has not yet been published anywhere. The sub-indices are used with equal weighting, which can also be found in other regional analyses. The use of weighting was considered, but the results were essentially very similar. Both of the above-mentioned summary indicators were converted using min-max normalisation to a uniform scale from 0 to 100 in order to ensure the comparability of the variously defined input indicators. This eliminated differences in scale and allowed them to be aggregated using arithmetic means. In terms of innovativeness, attention needs to be focused on the results themselves, as the economic indicators within the CCI must be interpreted separately from the rest of the region's economy due to the significant representation of the non-profit sector and the nature of the CCI's contribution beyond the usual economic categories and thus also aspects such as the cultivation of society, the promotion of identity and belonging, etc.

In terms of spatial framework, the analysis deliberately works with a typology of four distinct regional categories representing the different conditions in which the cultural and creative industries (CCIs) in the Czech Republic are developing. The typology of regional categories (metropolitan, old industrial, rural, and other regions) was developed to reflect contrasting spatial, economic, and structural conditions relevant to the development of CCIs. The classification takes into account population size and density, historical industrial profiles, urbanisation levels, and functional roles within the national economy.

In this context, the Vysočina Region is seen as an example of a predominantly rural region that is not a natural cultural or economic centre and therefore represents a suitable environment for examining the resilience and structural diversity of CCIs in less exposed areas. The capital city of Prague, on the other hand, represents a type of metropolitan centre where a high concentration of cultural institutions, entities and infrastructure can be expected, as well as significant specialisation in certain CCIs (e.g. publishing, advertising, creative industries linked to international markets). It is precisely this dichotomy between metropolitan and rural areas, and the different perspectives for the development of CCIs within them, that largely forms the logical line of the theoretical part of this text. A special group is formed by the so-called old industrial regions (Karlovy Vary, Ústí nad Labem, Liberec and Moravian-Silesian regions), which represent specific areas with a historical focus on mining and manufacturing, with structural and social problems, but also with potential for cultural revitalisation and conversion of industrial heritage. In these regions, the development of CCIs may be one of the ways to diversify the economic base and restore identity. The last comparative category is the other regions of the Czech Republic, which form a more general reference framework that can be used to imagine the average state and level of CCIs in the Czech Republic.

### **The presence of CCIs in a rural region – the Vysočina Region**

The Vysočina Region is located in the central part of the Czech Republic between the two most important agglomerations in the country – Prague and Brno (Figure 1). Despite this fact, it is a purely rural region, which has never undergone any significant industrialisation or related urbanisation. In terms of the nature of its settlement and regional economic profile, the Vysočina Region is clearly a rural region, with Jihlava still considered a weak regional centre that is unable to functionally integrate the whole territory of the region. It is the most rural region in comparison with other regions in the Czech Republic. It is characterised by low population density, weaker urbanisation and limited transport accessibility, especially in its peripheral areas. Nevertheless, there are significant economic activities here, especially in the manufacturing industries. The region has the highest employment in the primary sector in comparison with other regions of the Czech Republic. The secondary sector is also above average. Foreign direct investment by suppliers of components for the automotive industry plays a large role in this.

Figure 1.: The location of the Vysočina Region in the Czech Republic  
 A Vysočina régió elhelyezkedése a Cseh Köztársaságban



Source: Authors' construction

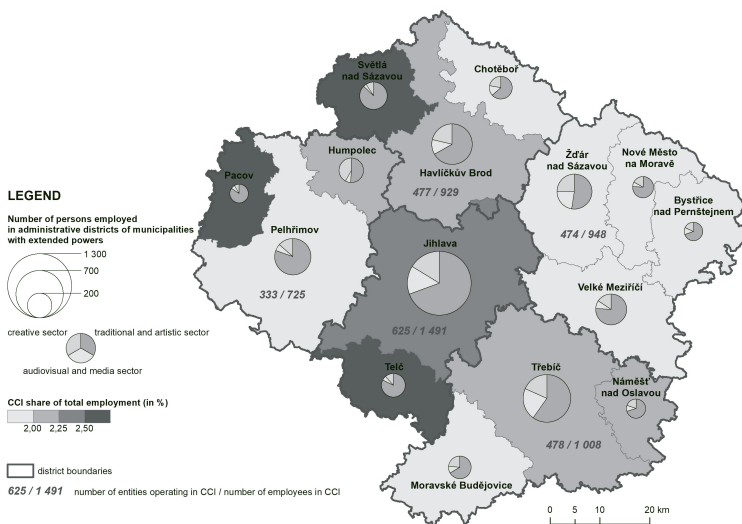
The potential of the cultural and creative industries in the region can primarily be expected to be in connection with the cultural and historical heritage, local monuments, specific landscape and rural character of the region (Figure 2). Despite its smaller size compared to regional centres in other regions, Jihlava plays a role as a platform for cultural innovation, cooperation and concentration of cultural and creative actors in a predominantly rural region. There are three UNESCO World Heritage Sites in the region – the historic centre of Telč, the pilgrimage church of St. John of Nepomuk on Zelená hora and the Jewish town with the Basilica of St. Prokop in Třebíč – which are of exceptional importance in a European context. In addition, the region hosts cultural activities of national importance such as the International Documentary Film Festival, and there is also the Horácké Theatre and the Vysočina Regional Gallery in Jihlava. These institutions and events create an environment for professional cultural production, creative collaboration and the development of cultural infrastructure with spillover effects into other sectors.

Of the 2,388 entities included in the CCIs mapping in the Vysočina Region, most fell into the „Performing Arts” category (357, i.e. 14.9%) and only slightly fewer into the „Advertising” category (351, i.e. 14.7%). Over 300 entities were concentrated in the industry of „Books and Printing”, which also includes translators and interpreters, and „Fine Arts”, which includes not only painters, sculptors, etc., but also a large number of photographers. More than a tenth of entities belonged to the „Arts and crafts” (279, i.e. 11.7%) and „Cultural Heritage” (263, i.e. 11.0%). Other industries were represented by a lower share („Architecture”,

„Design”) and less than 5% of entities were concentrated in the industry „Art Education” (93, i.e. 3.9%), which, however, employed the most workers of all CCIs due to the large number of primary and secondary art schools (an estimated 1,000 individuals, i.e. one-fifth of all persons employed in CCI entities identified during the mapping<sup>3</sup>). The mapping also found that a negligible number of entities from the audiovisual and media industry, i.e. from the industries of „Film and Video”, „Music”, „Radio”, „Television” and „Video Games”, are based or operate in the Vysočina Region – a total of 44 entities, i.e. 1.8%.

Figure 2.: Spatial distribution of entities operating in CCIs sectors and the number of people employed in them in the Vysočina Region in 2023

*A kulturális és kreatív iparágakban működő szervezetek térbeli eloszlása és az általuk foglalkoztatottak száma a Vysočina régióban 2023-ban*



Source: Strategy for the support and development of CCIs in the Vysočina Region until 2035, Authors' processing

Table 1 shows the structure of entities from the CCIs according to *size categories* of number of employees. A problem when working with the Register of Economic Entities (RES) is the high proportion of entities that do not specify their number of employees (in the file resulting from the CCIs mapping, this was 531 entities, or 22.2%). The proportion of entities without employees, i.e. mainly self-employed persons, was 63.2% among SMEs in the region. These two categories were combined into one in the following table. The remaining SMEs can be classified into three size categories: 202 entities, or 8.5% of all entities, had 1–5 employees; 42 entities, or 1.8%, had 6–9 employees; and the remaining 105 entities, or 4.4%, had more than 10 employees. It can therefore be stated that individuals and micro-enterprises (fewer than 10 employees) accounted for more than 95% of CCIs in the Vysočina Region.

Table 1.: Structure of entities by CCIs and employee number category  
 A szervezetek szerkezete KKI-k és alkalmazotti létszám kategóriák szerint

CCIs/number of employees category	No employees and not specified		1-5		6-9		10 and more		Total
	abs.	%	abs.	%	abs.	%	abs.	%	
Architecture	167	86.6	18	9.3	6	3.1	2	1.0	193
Design	153	89.0	14	8.1	1	0.6	4	2.3	172
Books and print	292	89.3	25	7.6	1	0.3	9	2.8	327
Cultural heritage	188	71.5	47	17.9	9	3.4	19	7.2	263
Advertising	319	90.9	25	7.1	3	0.9	4	1.1	351
Performing arts	325	91.0	12	3.4	7	2.0	13	3.6	357
Arts and crafts	219	78.5	39	14	5	1.8	16	5.7	279
Art education	39	41.8	10	10.8	10	10.8	34	36.6	93
Fine arts	301	97.4	7	2.3	0	0.0	1	0.3	309
Other	36	81.8	5	11.4	0	0.0	3	6.8	44
Total	2,039	85.4	202	8.5	42	1.8	105	4.4	2,388

\*Other CCIs include the industries of „Artistic Education”, „Music”, „Film and Video”, „Radio”, „Television” and „Video Games”.  
 Source: Mapping of CCIs entities, Vysočina Region, 2023–2024, Authors' calculations

In terms of the evaluation of entities by industries and employee category, it was found that entities with more than 10 employees mainly operate in the industry of “Artistic Education” (more than a third of all entities in this industry have more than ten employees). Their share is also higher than 5% in the industry of „Cultural Heritage”, in the total of „Other”, and also in „Arts and Crafts”, where, however, entities without employees and the smallest entities (1-5 employees) otherwise dominate. There were very few entities with 6 to 9 employees, and they did not form a significant group in any industry (only in „Artistic education” do they exceed 10%).

Assessment of employment and economic performance of selected industries of the commercial sphere of CCIs – rural regions versus other types of regions

The assessment of the contribution of selected industries of the commercial sphere of CCIs in different types of regions is expressed by two summary indicators, a summary indicator of the structural importance of individual industries and a summary indicator of economic performance.

For the first summary indicator, the sub-indicators used are the employment coefficient in individual industries (hereinafter EC) in a given region, the specialisation index (hereinafter SI) and the concentration index (hereinafter CI), for details see Table 2. According to the employment coefficient, the Vysočina Region had an almost identical share of people employed in the industries of „Cultural Heritage” and „Books and Print”, each of which accounted for more than a quarter of all people employed in CCIs. This was significantly more than in the old industrial regions and other regions of the Czech Republic, and in the case of „Cultural Heritage” also in Prague. In the Vysočina Region, the SI also confirms the exceptional role of „Cultural Heritage”, for which specialisation can be demonstrated according to these criteria (SI = 1.66). However, this is only one industry, although above-average employment was also found in the region in „other industries including „Music” and „Artistic Education” as well as „Performing Arts”. The concentration index comparing the employment coefficient in the industry with the share of the Czech population in individual territories is clearly best for Prague, where an above-average concentration was found in all sub-industries of CCIs; in the Vysočina Region, it was again only the „Cultural Heritage” industry, while in the old industrial regions, the CI did not exceed 1.0 in any sub-industry. In the other regions, there was a very slight concentration in the case of the CCIs sub-industries „Architecture”, „Other” and „Performing Arts”.

Table 2.: Sub-indicators – employment coefficient in the industry (EC), specialisation index (SI) and concentration index (CI) of selected industries of the commercial sphere of the CCIs in the regions of the Czech Republic in 2023  
 Almindkátörök – foglalkoztatási együttható az iparban (EC), specializációs index (SI) és koncentrációs index (CI) a Cseh Köztársaság régióiban működő KKI-k kereskedelmi szférájának kiválasztott iparágai esetében 2023-ban

CCIs	Capital City of Prague			Vysočina Region			Old industrial regions			Other regions		
	EC	SI	CI	EC	SI	CI	EC	SI	CI	EC	SI	CI
Architect	5.6	0.32	1.10	15.9	0.89	0.63	24.9	1.40	0.76	29.3	1.64	1.12
Books and print	52.9	1.69	5.85	26.3	0.84	0.59	11.6	0.37	0.20	14.3	0.46	0.31
Cultural heritage	14.2	0.85	2.95	27.6	1.66	1.17	16.1	0.96	0.52	18.8	1.12	0.76
Advertising	20.0	0.97	3.37	16.4	0.79	0.56	30.5	1.48	0.80	18.3	0.88	0.60
Performing arts	1.9	0.29	1.02	6.7	1.06	0.75	11.5	1.82	0.99	9.4	1.50	1.02
Fine arts	3.4	1.04	3.64	2.1	0.65	0.46	1.9	0.57	0.31	3.6	1.10	0.76
Other	2.0	0.5	1.75	5.0	1.26	0.89	3.5	0.88	0.47	6.3	1.58	1.08
Total	100.0	-	3.47	100.0	-	0.71	100.0	-	0.54	100.0	-	0.68

Source: CZSO 2025 (unpublished data), Authors' processing

In summary, we can see differences between the defined regions not only in terms of the dominance of different industries, but also in the ranking of industries according to their importance for employment. In the Vysočina Region, the industry of greatest importance for employment in the CCIs is „Cultural Heritage”, closely followed by two other industries, namely „Other”, which includes music and arts education, and „Books and Printing”. However, the overall employment indicators are much more balanced in the Vysočina Region than in Prague, and this is also the case in the other two regions.

Table 3.: Summary indicator of the structural importance of selected industries of the commercial sphere of CCIs in the regions of the Czech Republic in 2023  
*A KKI kereskedelmi szférájába tartozó kiválasztott ágazatok strukturális jelentőségének összesített mutatója a Cseh Köztársaság régióiban, 2023*

CCIs	Capital City of Prague	Vysočina Region	Old regions	Other regions
Architecture	3.7	33.9	74.1	100.0
Books and print	100.0	44.0	11.3	13.9
Cultural heritage	34.7	100.0	43.6	56.9
Advertising	44.2	28.0	84.2	42.9
Performing arts	0.0	33.2	77.9	66.1
Visual arts	36.9	0.0	9.2	36.6
Other	10.1	44.1	25.0	66.8

Source: CZSO 2025 (non-public data), Authors' processing

The assessment of the economic performance of selected industries of the commercial sphere of CCIs is based on the use of a summary indicator of economic performance. This indicator combines the individual indicator of average performance. This indicator combines the individual indicator of average wages and aggregated data providing an overview of CCIs in terms of sales, revenues and accounting added value (AAV).

Unlike structural importance, the summary indicator of economic performance does not show a clear dominance of any sub-industry of CCIs in any of the regions monitored (no industry reached a value of 100). However, in the Vysočina Region, the significant position of „Cultural Heritage” was also demonstrated in this way, exceeding all other regions in terms of the summary indicator. A similar lead was also found in the Vysočina Region in the industry of „Books and Printing”, especially in comparison with other regions of the Czech Republic, where this industry is significantly underdeveloped, and also in „Performing Arts”, where, on the contrary, the situation in the region is comparable to other regions of the Czech Republic, including old industrial regions, but significantly exceeds the values for Prague.

The industries of „Architecture” and „Advertising” have an almost identical and moderately high contribution to the economy of the Vysočina Region in the

summary evaluation, with the former clearly dominating in old industrial regions and other regions of the Czech Republic and the latter, albeit not by such a large margin, in Prague. Although average wages and sales were relatively high in the Vysočina Region in the aggregated industry „Other”, this industry was the second weakest in the summary indicator, in contrast to the situation in old industrial regions, where it was the second strongest, and in Prague (the third strongest). As with employment, „Fine Arts” remains without significant economic impact in all regions.

Table 4.: Summary indicator of the economic performance of selected industries of the commercial sphere of CCIs in the regions of the Czech Republic in 2023  
*A KKI kereskedelmi szférájába tartozó kiválasztott ágazatok gazdasági teljesítményének összesített mutatója a Cseh Köztársaság régióiban, 2023*

CCIs	Capital City of Prague	Vysočina Region	Old industrial regions	Other regions
Architecture	27.0	39.8	94.6	79.8
Books and print	35.3	50.0	31.6	6.2
Cultural heritage	54.7	56.3	44.3	50.0
Advertising	64.9	39.4	46.1	48.1
Performing arts	12.5	42.5	39.1	41.2
Visual arts	3.4	4.5	0.1	14.6
Other	52.0	32.8	60.1	40.2

Source: CZSO 2025 (unpublished data), Authors' processing

### Discussion of results from the perspective of the position of CCIs in rural regions – Vysočina Region

The results of the analytical part largely correspond to theoretical findings that link the character of the territory, in this case a rural region, with expected activities and profiling types of CCIs. The cultural and creative sector in the Vysočina Region is closely linked to local specifics – natural and cultural heritage, community culture and small businesses. This place-based orientation enables stable, albeit rather extensive, development of CCIs without significant dependence on external impulses, infrastructure and networks. However, the key challenges remain the overall low employment in many sub-industries as well as their low economic performance.

In the case of the Vysočina Region, we can also confirm the general assumption about the tendency of CCIs to have a high proportion of natural persons and micro-enterprises (95% of entities have fewer than 10 employees). This also corresponds to the nature of the region's business environment, which is based on trade, crafts and the non-profit sector. A specific feature is

the importance of cultural heritage, which is exceptional in the region. This is not only due to the three UNESCO sites of supra-regional importance (Telč, Třebíč, Zelená Hora), but also thanks to a network of smaller museums, memorials and cultural institutions evenly distributed throughout the region. „Cultural heritage” is the most structurally significant industry in the region and also the only industry that achieves the absolute maximum within the Czech Republic (a value of 100 in the structural significance indicator), which clearly distinguishes the region from other regions, where more technically oriented industries such as „Architecture” or „Advertising” dominate. Assessing the importance of cultural heritage from the perspective of economic performance is more complex, as we see a paradox in the form of a relatively strong position in terms of total revenues and added value, but with very low average wages. This is due to the internal nature of the industry, where the cost of labour is not as high as in other industries.

In terms of the overall assessment of the economic performance of selected industries of the commercial sphere, the region lags behind the capital city, which is understandable for many reasons, but in relation to other areas of the country (old industrial regions or other regions of the Czech Republic), it achieves solid results in some areas. For example, in the „Books and Printing” industry, which includes translation and publishing activities, the region shows above-average wages and performance – this may be related to skilled professions that are often carried out remotely (e.g. freelance translators), which are not dependent on the location of production and allow for a loosening of the traditional spatial relationship between work and housing. Similarly, the „Other” industry (music and arts education) achieves relatively high levels of wages and revenues. We can therefore see confirmation of the assumption that highly specialised professionals may prefer naturally attractive and quieter locations for their individual lives (in terms of both work and housing). Beyond housing, this can be explained by more complex processes of innovation diffusion in some areas of the CCIs from cities to rural areas, as well as by high competition in cities; growth in demand for high-quality cultural events and professional performers bringing high-quality live art to rural areas; an established base of volunteers in rural regions willing to introduce cultural and artistic innovations into their own cultural and leisure activities. The pioneers in the field of creativity in the region are therefore primarily the creators themselves, qualified professionals, art school students, associations, but also employees of subsidized organizations focused on culture and arts education. Another reason may be the existence of vacant spaces that are more affordable than in large cities, which can be provided to professional creatives, e.g., within the framework of partnerships, or used to create so-called creative/artistic residencies.

Overall, it can be said that the cultural and creative industries in the Vysočina Region represent a structurally balanced and diversified sector, strongly rooted in local cultural and community conditions. Compared to other

regions of the Czech Republic, the region stands out in particular for the importance of its „cultural heritage” and the stable presence of traditional and educational forms of CCIs, while technically and digitally oriented segments (the audiovisual and media sector of CCIs) have minimal representation here. The Vysočina Region thus presents itself as a simple rural region, but one that is culturally and economically adaptable, drawing on historical and community resources rather than on agglomeration economies and knowledge spillovers associated with the urban environment and, in particular, large cities or metropolitan areas.

An analysis of the performance of the CCIs has shown that rural regions can compete with other regions. The same is true of overall economic performance, with the Vysočina Region certainly not among the economically weak regions of the Czech Republic. In 2023, it even had the fifth highest GDP per capita of all 14 regions. The region also has one of the lowest unemployment rates in the Czech Republic in the long term. In other words, the economic base in the Vysočina Region is in good shape, enabling CCIs to function well not only on the supply side but also on the demand side.

## **Conclusion**

The cultural and creative industries (CCIs) represent an important but geographically and structurally differentiated segment of the economy. In metropolitan areas, CCIs are integrated into broader innovation ecosystems, benefit from a concentration of talent, infrastructure and international links, and generally exhibit a high degree of specialisation, professionalisation and economic performance. In rural regions, on the other hand, their role is less prominent, but not insignificant. It is here that the diversity of the CCIs manifests itself in the form of strong involvement in community culture, crafts, heritage preservation and cultural tourism. Rural areas do not create agglomeration advantages, but they offer specific local resources – cultural landscape, historical heritage and social cohesion – which can be a valuable asset for the formation of alternative models of cultural economy. The successful development of CCIs in these areas depends primarily on the quality of second-order cultural infrastructure, the availability of facilitators and the ability to use digital tools to overcome spatial isolation.

In this respect, the Vysočina Region is a model example of a rural region where the cultural and creative sector does not reach metropolitan levels of concentration or profitability but nevertheless shows a stable presence and structural balance. The dominant role of cultural heritage is confirmed by both structural indicators and its strong anchoring in local conditions, thanks in particular to the presence of three UNESCO monuments and a network of regional cultural institutions. The economic performance of CCIs in the Vysočina

Region is lower than in metropolitan areas, but in some industries – such as „Books and Printing” or „Artistic Education” – the region achieves above-average results even in comparison with other regions outside Prague. CCIs here operate mainly in the form of self-employed persons and micro-enterprises, which reflects the general nature of the region's business environment. Overall, the Vysočina Region can be perceived as a culturally adaptable and resilient region whose cultural and creative sector draws on historical, community and landscape qualities and offers potential for sustainable development based on local resources and identity.

In terms of practical implications, the case of the Vysočina Region offers several important recommendations for supporting CCIs in rural regions. It is crucial to recognise the importance of cultural heritage as the core of the structural identity of the cultural economy, including its potential for job creation and economic value, albeit with low wage levels. Support should be directed primarily towards the development of second-order cultural infrastructure (libraries, community centres, workshops), which provides both a base for cultural production and access to participation in the region. Targeted support for micro-enterprises and the self-employed, who form the backbone of the cultural economy in rural areas, is also important, for example through grant schemes, education and counselling. Furthermore, it seems essential to develop digital skills and tools that enable creative actors in rural areas to overcome geographical isolation and connect to wider markets. Finally, it is necessary to support cultural facilitators and local leaders who play a key role in activating communities and connecting different actors across industries. The combination of these approaches can significantly contribute to the sustainable and locally anchored development of the cultural and creative sector outside major centres.

While the proposed recommendations highlight key levers for supporting CCIs in rural regions, their implementation may encounter structural limitations and potential tensions. The development of second-order cultural infrastructure often depends on the political will and financial capacity of local governments, which may vary significantly across regions. Similarly, support for micro-entrepreneurs and freelancers, although crucial, may clash with administrative barriers or insufficient policy instruments tailored to the cultural sector. Promoting digital competencies and remote access can help bridge spatial gaps, yet it also risks increasing dependency on platforms with uneven market dynamics. These aspects highlight the importance of designing interventions that are not only context-sensitive but also capable of negotiating the complex trade-offs inherent in cultural development. At the same time, it should be noted that individual CCIs differ significantly in terms of the extent to which it makes sense to support them with public investment or any other form of public support and intervention. On the one hand, sectors such as advertising, design, and architecture (in the sense of individual competition for contracts and projects) have a clear

market impact, and the rationale for public intervention is limited or even negative. On the other hand, sectors such as cultural and historical heritage activities, as well as book printing and performing arts, which have been identified as important in rural regions, have the potential for public support and stimulation without causing negative market effects. Moreover, policy interventions in the field of cultural and creative industries must account for the inherently organic and spontaneous nature of these activities. Overly formalised or top-down measures risk being perceived as artificial, and may fail to resonate with local actors or stimulate genuine engagement. As such, effectiveness often hinges on the ability to enable and support existing grassroots dynamics rather than imposing external models.

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### Notes

1. Call No. 0232/2022 for the submission of applications for support under the National Recovery Plan – Regional Cultural and Creative Sector Development Initiative for the creation of strategic materials in the field of development and support of cultural and creative industries.
2. The content of the previous three economic indicators corresponds by definition to the indicators of the same name in the Balance Sheet and Profit and Loss Statement as defined by Czech accounting regulations.
3. According to the Annual Report on the State and Development of the Education System in the Vysočina Region for the 2022/2023 school year and the 2023 calendar year, 621.47 people worked at 25 primary and 3 secondary art schools in the region.

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