

cultural relations

PLATFORM

REPORT ON THE IMPACT OF COVID-19 ON THE CULTURAL AND CREATIVE INDUSTRIES (CCIS) IN NORTH MACEDONIA



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REPORT ON THE IMPACT OF COVID-19 ON THE CULTURAL AND CREATIVE INDUSTRIES (CCIS) IN NORTH MACEDONIA

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List of Abbreviations and Acronyms

AV	Audio-visual
CAGR	The Cultural Heritage Protection Office
CHPO	Compound annual growth rate
CCI	Cultural and Creative Industry
CCS	Cultural and Creative Sector
CCW	Cultural and Creative Worker
CRP	Cultural Relation Platform
CSO	Civil Society Organisations
EC	European Commission
ESA	Entertainment Software Association
ESS	European Statistical System
ESSnet	European Statistical System Network on Culture
EU	European Union
FA	Film Agency
FB	Facebook
ICT	Information and Communication Technology
IPA	Instrument for Pre-Accession
MAKSTAT	State Statistical Office of the Republic of North Macedonia
MoC	Ministry of Culture
NACE	Coder, a pan-European classification system that groups organisations according to their business activities.
NATO	North Atlantic Treaty Organization
NS	National Strategy
OECD	Organisation for Economic Co-operation and Development
R&D	Research and Development
SME	Small or medium-sized enterprise
UNESCO	United Nations Educational, Scientific and Cultural Organization
VOD	Video on Demand

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FOREWORD

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The author

1. EXECUTIVE SUMMARY

This extensive study of the impacts of Covid-19 on the North Macedonia Cultural and Creative Industries took place between February 2022 and March 2022. It was delivered by a project team of three people and involved a combination of complementary methods. The team collected data via desk research and a related survey (with 161 respondents), and subsequently analysed the data thematically to highlight the most significant impacts of COVID-19 on the CCI in North Macedonia.

Key findings

According to the available data, the situation with the CCI in North Macedonia had significant challenges even before COVID-19; the crisis just accelerated these challenges and made them more visible, such as: political influence on the sector; partisanship; corruption in the public culture sector; non-functional judiciary having a direct impact on enforcement of copyright (difficulty to implement copyright rules); non-transparency; non-functional administration; lack of adequate laws and difficulties in terms of their implementation due to the lack of regulatory mechanisms; populist approach to the distribution of public funds (insufficient for everyone); lack of clear strategy; lack of responsibility in the public institutions; inadequate human resource management (incapable or insufficiently trained people, placed by a political party at a responsible position); and almost no support for the CCI for a long period.

In addition, the cultural and creative industries in North Macedonia have not yet been clearly defined. The Ministry of Culture has yet to develop a policy strategy addressing the specifics of the CCIs. No explicit instruments for support of this sector were developed so far at the governmental level. However, in general terms, CCIs are recognised by the public authorities as a potential growth sector that can be developed and which can positively influence the economy of the country. The exception in this respect is the film industry, given that since 2014 there has been an independent entity—the North Macedonia Film Agency—which stimulates and supports the development of this sub-sector with financial instruments.

There is a lack of a systematic approach towards data collection, classification, systematization, and analyses of the cultural sector, including the CCI sector, in North Macedonia. Without systematic and strategic data collection and analyses, no clear and adequate policy can be developed.

The majority of the CCIs in North Macedonia have been strongly affected by the COVID-19 crisis. At the time of writing, the economic and social impact of the pandemic has been rather high in the short- and mid-term and most probably for the long- term.

The subsectors most affected by the COVID-19 crisis, according to the available data, are the performing arts; recorded music; museums and historical sites; film; crafts, and libraries. Both enterprises and individual CCWs who work in these subsectors were strongly influenced by the COVID-19 crisis.

The CCWs who work part time or as freelancers in the creative and cultural sector were also strongly affected by the COVID-19 crisis, for example by losing their jobs or the cancelling of their contracts, and thus many of them have been left without basic financial income and are forced to work elsewhere.

Employees in the public sector in the CCI were shielded and received secured income during COVID-19. Even more, they entered into a collective bargaining agreement and their income increased during the COVID-19 crisis.

The sectors involving computer programming and games, design, advertising and marketing communication, consulting and related activities, information service activities, management activities, management advice, and creative, artistic and entertainment activities have displayed positive economic trends during the COVID-19 crisis (2020). This growth and the associated positive trends in these subsectors were present also before COVID-19, so the new situation is only a continuation, and is in some part an accelerating force for the growing of the existing trend.

The film industry, recorded music, performing arts, museums, historic sites, and handicrafts have meanwhile exhibited negative economic trends during the COVID-19 crisis in North Macedonia. Specifically, the economic trends in these subsectors in North Macedonia could not be directly connected to the COVID-19 crisis, but the main reason for these trends could be due to a lack of systematic public support, lack of a legislative framework that could support the development of these subsectors; and the lack of skills, knowledge and ability to adapt to such a digital transition.

The biggest challenges that the CCI sector is facing during the COVID-19 crisis, according to the survey are as follows: lack of legislative instruments that can regulate the subsectors in crisis; lack of systematic and strategic approach towards the sector (such as not developing adequate mitigation instruments and support); limitations on traveling and mobility; decreased audience sizes; the cessation of most activities; changing the scope and content of the work; decrease in incomes, the lack of any kind of support from the public authorities, and limited skills in online communication and digitalization, including online banking.

The situations that have emerged because of COVID-19 have given rise to new opportunities and spaces for innovation and new business models, such as finding new ways to utilise public spaces; new methods for event management; new protocols for production; new technological solutions in live performances; online distribution (VOD), etc.

The forms of digital transformation that took place in the CCI sector in North Macedonia during the COVID-19 crisis are diverse, such as: using new communication tools, new models for operations, new audience engagement models, the digitalization of artistic processes, new models for distribution, online sales, and new business models. It should be stated that these trends were present even before the COVID-19 crisis, but this new reality just accelerated the existing trends.

The government of North Macedonia created general measures for mitigating the COVID-19 crisis, supporting all active enterprises and individuals in the country. The measures for mitigating the COVID-19 crisis in

North Macedonia related to the CCI sector were very limited, which is mainly due to the lack of clear policy for development of the CCI sector even before COVID-19, and the lack of analyses and understanding of the sector. Moreover, the specific needs of the sector were not taken into consideration when creating these measures. From the available data, no consultation with the CCI sector took place during the COVID-19 crisis and in creating the mitigating measures.

This limitation in the mitigating measures is related to the number of entities and individuals from the CCI sector that benefited from these measures (a rather limited number of entities and individuals received support). In addition, the measures were short in duration and mainly focused on individuals, without clear strategic orientation or previous analysis of the needs of both entities and individuals.

Very little support was given to the CCIs in the form of income-generating measures; cost/tax reductions; social security benefits and affordable financial credits. Almost no support was given for legal framework modifications; support for innovation and digital transformation and capacity-building programmes.

The measures did not meet the needs and expectations of the CCI sector during the COVID-19 crisis.

2. INTRODUCTION AND BACKGROUND

Covid-19 harmed many individuals and had (and still has) a tremendous impact on civil societies and their governments. Many countries had to endure lockdowns, extensive portions of society had to be put in isolation, thousands of people lost their jobs, healthcare systems were under extreme pressure, and the governments had to make serious decisions.

This crisis has tremendously affected the arts and cultural field as well, and in particular the individual and organisational operations in the cultural and creative industries (CCI) sector. Most of the arts and cultural organisations across the world made opted for lockdown, resulting in many festivals, exhibitions, concerts, performances, and other activities being cancelled or postponed. This situation led to great uncertainty for the sector and a resultant economic crisis with the prediction of long-term negative effects for it. At the same time, despite the negative effects, this crisis introduced new opportunities, as many of the artists and arts organisations tried to find a solution to this situation by shifting and adapting their normal functioning to digital platforms, new business models, and new approaches to audiences, sustainability, and ecology.

Many governments undertook various actions in order to provide financial assistance to the sector. National and supranational bodies worldwide undertook research intended to measure the impact of COVID-19 and its economic and social repercussions on the Cultural and Creative Industries sector.

For instance, according to UNESCO's study on the Cultural and Creative Industries in the face of COVID-19 (2021)¹, the cultural and creative industries (CCI) that are most dependent on physical experiences at venues and sites have experienced the most severe economic losses in relative terms, across many different national contexts.

Market analyses of the CCI sector in the EU (2019)² revealed that the economic importance of the CCI sector is like that of others, such as the Information and Communications Technology (ICT) and Accommodation and Food Services sectors. For example, the CCI sector accounts for EUR 413 billion in terms of added value i.e., 5.5%. The employment in the CCI sector and the number of companies in this sector have grown strongly at above 4.5% CAGR since 2013. At the EU member state level, the CCS employ on average 6.2% of the workforce. Moreover, CCI companies represent— on average—12.1% of companies across member states.

¹ United Nations Educational, Scientific and Cultural Organization (UNESCO) (2021) Cultural and Creative Industries, An Economic Impact Outlook. Retrieved on 10.03.2022 from <https://en.unesco.org/creativity/publications/cultural-creative-industries-face-covid-19>

² European Investment Fund (2019). Market Analysis of the Cultural and Creative Sectors in Europe. Retrieved on 10.03.2022 from https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/ccs-market-analysis-europe.pdf

According to KEA's report (2020) (The Impact of COVID on the CCS)³, the social impact of the crisis on cultural workers is significant, the precariousness of working conditions is specific to this sector and 33% of the cultural workforce is self-employed in the EU, compared with an average of 14% for the whole economy. This demonstrates that self-employment in the culture and creative sector is more than twice as high as the average for total employment (in the relative scale).

In addition, according to the 2021 study titled "*Rebuilding Europe: The cultural and creative economy before and after the COVID-19 crisis*"⁴, the cultural and creative economy lost approximately 31% of its revenue, and with this loss, this sector is one of the most affected in Europe. According to the same study, the most affected fields are performing arts (-90%) and music (-76%), while the less affected are the visual arts, architecture, advertising, books, press, and AV activities (-20% – -40%), and the only industry that retained a positive outlook and growth is the games industry (+9%).

Similarly, according to the IDEA Consult et al. report (Cultural and Creative sectors in Post-COVID-19 Europe: Crisis Effects and Policy Recommendations, 2021)⁵, the impact of the COVID-19 crisis was not equal for all activities and workers, where the most negatively affected were the performing arts and the heritage sector. One group in the CCI sector that appears to have been particularly exposed according to the same report are the many non-standard workers. Although the crisis is still ongoing, many efforts are underway to address and measure the impact and challenges associated with COVID-19 on the national level.

North Macedonia is no stranger to these global trends and thus this study's main goal is to explore the impact of the COVID-19 crisis on the North Macedonian CCI sectors.

This study has as its objectives to: better understand the current situation of the CCI sector in North Macedonia in overall terms and in the various subsectors, to determine the impact of COVID-19 on the CCI sectors, as well as the biggest challenges and opportunities; to identify policy measures adopted to mitigate such impact and enable affected sectors to recover; identify trends due to technology and market development and to provide general and specific policy recommendations in light of consequences of COVID-19 in the short-, medium- and long-term.

The report, in line with the study's objectives, presents the current situation of the CCI sector in North Macedonia in overall terms and in the various subsectors, the impact of COVID-19 on the CCI sectors, as well as the biggest challenges and opportunities, and the trends due to digitalization and market development alongside policy measures adopted to mitigate such impact.

3 KEA (Council of Europe) (2020) The impact of Covid on the CCS. Retrieved on 10.03.2022 from https://keanet.eu/wp-content/uploads/Impact-of-COVID-19-pandemic-on-CCS_COE-KEA_26062020.pdf

4 The European Grouping of Societies of Authors and Composers (GESAC)(2021) Rebuilding Europe: The cultural and creative economy before and after the COVID-19 crisis Retrieved on 10.03.2022 from <https://www.rebuilding-europe.eu/>

5 IDEA Consult et al. (2021) Cultural and creative sectors in post-Covid-19 Europe: crisis effects and policy recommendations, European Parliament, Policy Department for Structural and Cohesion Policies, Brussels Retrieved on 10.03.2022 from [http://www.europarl.europa.eu/thinktank/en/document.html?reference=IPOL_STU\(2021\)652242](http://www.europarl.europa.eu/thinktank/en/document.html?reference=IPOL_STU(2021)652242)

The Cultural and Creative Industry sector (CCS) is understood here, based on UNESCO's definition⁶, as an organised activity sector whose purpose is to produce or reproduce, promote, distribute and/ or commercialize cultural goods, services, or activities, of a cultural, artistic or heritage nature. Cultural and Creative Industries (CCI) in this research include architecture, film, radio, and television, recorded music, video games, computer programming activities, archives, libraries, museums and historical sites, books, and press, performing arts, visual arts, and other culture and creative activities.

The public cultural institutions are not the priority target of this study.

The overall study has called into question the statistical models that are traditionally used in North Macedonia. Therefore, the process of data collection and systematizing and analysing of the available data was one of the biggest challenges. The availability of the data varied from subsector to subsector as there is lack of clear and systematized information on the sector and subsectors; therefore, the views presented in this report cannot provide a complete overview in absolute numbers of the cultural and creative industries, but it can highlight the general trends in the sector.

More detailed information about the challenges in this respect is given in the research limitations section.

3. METHODOLOGY

3.1. Research approach

3.1.1. Data collection: Scope of research

Considering the objectives of this study, the data collection consisted of four main parts:

1. **Desk research:** includes data collection and the systematisation of existing data related to the CCI sector in North Macedonia before and during the COVID-19 crisis. In addition, reviews of key documents, literature reviews, previous reports and research, websites, and articles which provide an understanding of the impact of COVID-19 were carried out. This includes secondary data analyses of the main area of action in relation to the: number of stakeholders in the CCI per subsector, participation of CCI in the gross domestic product, added values, turnover, trade indicators, employment in the CCI, household expenditure on culture, changes in income, classification of the CCI in North Macedonia, and public support for the CCI before and during the COVID-19 crisis.
2. **Online survey:** The purpose of the online survey was to increase the validity of the research and to gain insights from a broader sample. The number of individuals that were included in the sample was 849, and included people from all the sub-sectors involved in this study. The lists of people

⁶ UNESCO (Definition: Creative Industries) Retrieved on 20.02.2022 from <http://www.unesco.org/new/en/santiago/culture/creative-industries/>

involved in the sample we collected included the public authorities, public institutions, Civil Society Organisations (CSOs), associations from the sub-sectors and individuals. 161 responses were collected, which is a remarkable number, bearing in mind that the time available to answer was only one week. The survey was organised via a Google Form, was disseminated in Macedonian (152 responses) and Albanian (9 responses) in February 2022, and was open for 10 days.

The main questions of the survey focus on: demographic data, CCI's main field of action, geographical scope; main challenges during the COVID-19 crisis; digital transformation; the impact of COVID-19 on management and operations; production and distribution, international mobility, changes in income, employment, business opportunities, innovation and new business models, cultural demand and consumption, participation, target audience (audience engagement), skills, cooperation, professional status of cultural and creative workers, and expectations from the public bodies. The survey provided information on the policy measures taken to mitigate COVID-19 for each subsector and collected ideas on potential policy measures to help the sector (national and local level).

3. **Semi-structured interviews with the representatives from the CCI sector**, (13 interviews with the representatives from the film industry, cinema, cultural heritage, computer programming and games, design, marketing and design, event management, recorded music, publishing, press, visual art, and architectural sectors. Unfortunately, the Minister of Culture, as a representative from the MoC, was not able to take part (despite our great effort). The list of interviewees is attached (See Annex V)
4. **Focus groups** (two focus groups took part with the representatives from performing arts (theatre, music, dance) and crafts). The list of participants in the focus groups is attached (see Annex V).

Almost all interviews and both focus groups were conducted online, and only two interviews took place face to face in Skopje. The interviews and focus groups provided more in-depth insights into the key areas: the economic and social impact of COVID-19 on their management and operations; the biggest challenges and needs of the subsectors, digitalisation, new models for operation, innovation and new business models, sustainability, ecology, and expectations from the public bodies.

The following CCI subsectors were involved in the study: architecture, film, radio, and television, recorded music, video games, computer programming activities, archives, libraries, museums and historical sites; books and press; performing arts; visual arts; and other culture and creative activities.

For the purpose of this report, CCI stakeholders are artists, cultural and creative workers (CCW), CCWs employed by public cultural institutions, CSOs (associations) and enterprises (large, micro or small enterprises).

3.1.2. Data Analyses

For the purposes of the analysis, a combination of desk research with a broad consultation of CCI actors and policy makers was conducted. The data analyses are largely based on quantitative methods (cross-tabulation and trend analyses) and qualitative methods (content, discourse analyses, and phenomenological research) which included the process of modelling the data, thereby extracting insights that are an integral part of the report.

The reference list (see Annex I) provides the different data sources and individuals that have been consulted.

3.1.3. Time frame

The overall study and the impact of COVID-19 are analysed in relation to the containment measures, challenges, opportunities, and trends taken in the 2020-2021 period, but it also includes the analyses of the CCI ecosystem in North Macedonia before COVID-19, in the period from 2017- 2020

The implementation of the study took place from January-May 2022.

3.1.4. Research Limitations and challenges

One of this research's limitations is related to the survey sample. It should be noted that the results of the survey do not provide a complete picture of the situation in the CCI sector in North Macedonia during the COVID-19 crisis. This is primarily due to the sample of respondents where app. one third (38.6%) came from public institutions, which during the COVID-19 crisis were well-protected by the MoC and could not share the same vision with the others who came from the private or CSO sector. This fact led to a minor skew regarding the results. However, the interviews and focus groups helped in terms of achieving a more realistic overview of the situation with the CCI sector.

The other research limitation is that the project team did not have the opportunity to hear from the Ministry of Culture of North Macedonia, the agency responsible for organising and developing the cultural sector. This is a limiting factor in terms of presenting the overall situation of the CCI in North Macedonia, although the desk research provides many details related to the work of the MoC in reference to the CCI sector.

The other research challenges are related to the collection of secondary data of public nature, originating from the institutions:

- 1. Difference in classification of the CCI sector**

The cultural and creative industries are difficult to classify because they are interconnected with other sectors. Thus, the classification depends on the understanding of the CCI sector. Given the

multi-dimensional nature of culture, statisticians use various methodologies which reflect the classifications specific to statistical areas. For instance, when analysing cultural employment, we need to classify the sectors of employment and occupations; for trade statistics, goods and services classifications are used; cultural participation is surveyed using a list of culture-specific activities. All the cultural items, categories and codes used in statistical language have been sorted for each area to comprise the theoretical scope of culture statistics. The ‘practical’ coverage of culture statistics can differ to a certain extent from the theoretical scope and vary between statistical domains.

The North Macedonian codes differ from the European Statistical System Network on Culture (ESSnet). For example, a total of 34 codes are included in the ESSnet-Culture statistics. In North Macedonia and the existing concept, the system of classification for the cultural domain includes 40 codes.

In total, four codes from the ESSnet-Culture statistics are not included in the North Macedonian classification. Namely, 47.62 Retail sale of newspapers and stationery in specialised stores, 18.10 Printing and service activities related to printing, 58.12 Publishing of directories and mailing lists, and 32.2 Manufacture of musical instruments are part of ESSnet and are not part of the North Macedonian classification.

In addition, 10 cultural domains and/or codes included in the North Macedonian conception are not part of the ESSnet (More details in the section *Classification of CCI*).

2. **Complex operating definition for cultural and creative industries**

CCI is a composite of activities at different levels, which is in line with the NACE Rev. 2 classification (Regulation (EC) No.1893/2006⁷) and sectors which are defined in the State Statistical Office. For example, Music and Performing Arts include activities which are part of five sectors, as follows: Manufacture, Trade, Information and Communications, Education and Arts, Entertainment and Recreation. Data are often available at level 2 or 3 in the sector, and not at level 4 (specific activities within the frames of the level 4 sector, such as Publishing of books 8.11) compared to level 2 – Publishing activities (58)). Therefore, based on the data on the more general activities, one cannot draw any conclusions about the situation in more specific activities in the sectors; that is, what pertains to level 2 in the Publishing sector should be also representative of the specific activity at level 4, such as the publishing of books.

3. **Unavailable data** – Although the Statistical Office offers a great deal of data, not all of this data is publicly available on the MAKSTAT database or is published with certain dynamics on an annual basis, thus resulting in a lack of key data of interest to the research. For example, data on the GDP and added value for 2020 is still unpublished.

⁷ The 2013 National classification of activities is available at <https://www.stat.gov.mk/KlasifikaciiNomenklaturi.aspx?id=2>

4. **Incomplete databases** – Although the MAKSTAT database is rich in data, some of the databases are incomplete for all sectors of activities or the data are not available for all levels of activities. In addition, databases that re-segregate data according to certain variables (for example, geographical location or organisational form) do not display the sums of entities that are less than 3, i.e., they are treated as protected data. Thus, the number of entities segregated according to certain variables differs from the total number of entities in a particular sector or year. Moreover, in the revenue databases in the sectors, the data from the revenues of the public institutions are not known.
5. **Communication with public institutions: Lack of publicly available data of a public nature on the official institutional websites** (a lack of caring for data and transparency of the institutions); **Insufficient synchronization from old to new websites and insufficient attention to proper and complete migration of data** (lack of online institutional memory); unsynchronized data on official websites and data in the institutions themselves (such as the total budget of the Ministry of Culture in their annual reports that are not made public and which differ from the more specific data and statistics available on their website). Although the institutions have clear procedures for public information requests, **the outcome of such processes is burdened by a lengthy timeline, potentially incomplete data, or the institution's inability to share the requested data due to not being competent**. There is further an **inclination** of institutions towards transparency and accountability.
6. Communication with donors: Most donors (domestic and foreign) share only general data on grants or published calls, which includes all fields of action, such as democracy, education, agriculture, etc., making it a challenge to obtain information on the CCI sector separately.

4. KEY FINDINGS

4.1. General Context in North Macedonia

The Republic of North Macedonia, an independent and sovereign country since 1991 (following the dissolution of the former Yugoslavia), is a multicultural country with complex relations among different ethnic and religious groups living in the country.⁸ According to the latest population cense (2021)⁹, 1,836,713 citizens live in North Macedonia, of which 58.44% declared themselves as Macedonians, 24.3% as Albanians, 3.86% as Turks, 2.53% as Roma, 1.30% as Serbs, 0.87% as Bosnians, and 0.47% as Vlachs. (See Table 1). From the total number of inhabitants, 50.4% are women and 49.6% are men. In the two decades since the last census was held in 2002, the number of inhabitants in the country has decreased by 9.2 percent.

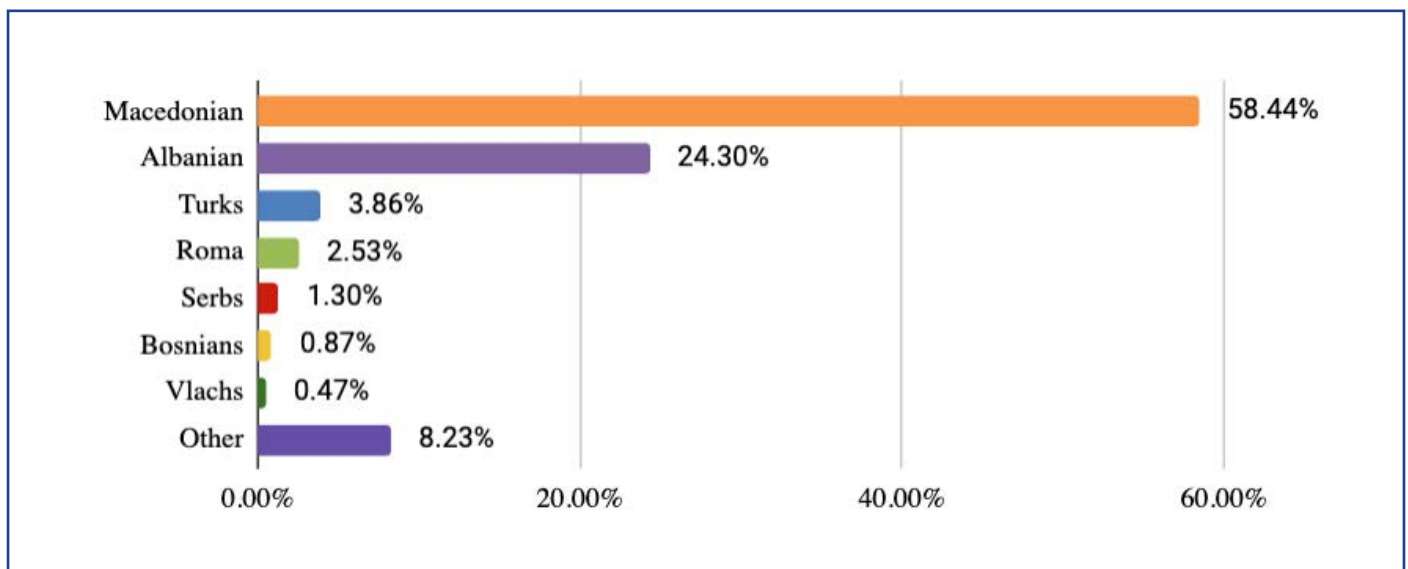


Table 1: Structure of the population in North Macedonia according to the census in 2021

The country is a parliamentary democracy with an executive government composed of a coalition of parties from the unicameral legislature and an independent judicial branch with a constitutional court. It has two levels of governance: national and local.

One of the priorities of the Macedonian government is EU integration, and it has been a candidate country since 2005. The EU integration process has been challenging for variety of reasons, internal and external, past, and present. According to the last European Commission country progress report (October

⁸ State Statistical Office of the Republic of North Macedonia (2021) Naselenie na 31.12, pol, vozrast, statistichki regioni, godini (Population on 31.12, gender, age, statistical region, years). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_Naselenie_ProcenkiNaselenie/225_Popis_reg_3112_PolVoz_mk.px/?rxid=cace8311-ffb9-4115-ac7b-8893c526b50a

⁹ State Statistical Office of the Republic of North Macedonia (2021) Popis na naselenieto, domakjinstvata i stanovite vo Republika Makedonija, 201-). Retrieved on 06.09.2022 from <https://popis.mk/objaveni-prvite-obraboteni-podatoci-od-popisot-2021/>

2021)¹⁰, compared to previous reports, the country has made some progress in the reform of its public administration, is moderately prepared in the prevention and fight against corruption and the fight against organised crime, has seen some progress in the implementation of the judicial reform, and the legal framework on the protection of fundamental rights is largely in line with European standards. Additionally, the country joined NATO in March 2020.

The Republic of North Macedonia has an open economy that is integrated into international trade, with a total trade-to-GDP ratio of 129%¹¹ and a gross national expenditure of 12.2 million Euros (2020).¹² The most important sectors are agriculture and industry, while the service sector also grew in the past few years.

The work force has, to some extent, a competitive education and skills though lacks adequate jobs, which leads to steady brain drain. The country's ambitious economic policy is to become a developed functional economy, which will produce new jobs and lead to greater efficiency, productivity, and competitiveness of companies, and increase exports and investments, as well as leading to higher living standards and a better life for all citizens.¹³

According to the Western Balkans Regular Economic Report, North Macedonia is rebounding from the COVID-19-induced recession of 2020, due to a quick recovery in 2021,¹⁴. As well, according to Linda Van Gelder, World Bank Regional Director for the Western Balkans, North Macedonia would benefit from reforms in the business environment, governance, and digitalization, which would contribute to its growth and to closing the gap with EU countries (ibid).

The country has also made particular efforts to develop the small and medium-sized enterprises sector. The cultural and creative industries are recognized as having potential that can be developed and can influence the economy of the country, but no concrete efforts and explicit instruments for support of this sector have been developed at the governmental level so far, apart from in the film sector.

Regarding the COVID-19 pandemic, a total of around 293,328 (February 2022)¹⁵ cases and about 8,898 deaths related to the pandemic were recorded in North Macedonia. Around 39.93% of the population were fully vaccinated by February 2022¹⁶.

10 Directorate-General for Neighbourhood and Enlargement Negotiations (2021) North Macedonia progress report https://ec.europa.eu/neighbourhood-enlargement/north-macedonia-report-2021_en

11 The World Bank (2022) World Development Indicators Retrieved on 10.03.2022 from <https://data.worldbank.org/indicator/NE.TRD.GNFS.ZS>

12 The World Bank (2022) World Development Indicators Retrieved on 10.03.2022 from <https://data.worldbank.org/indicator/NE.TRD.GNFS.ZS>

13 Ministry of Economy of North Macedonia (2021) Mission, vision and goals, Retrieved on 06.03.2022 from <https://economy.gov.mk/info/misija>

14 World Bank (2021) Western Balkans Regular Economic Report: Fall 2021, Retrieved on 06.03.2022 from <https://www.worldbank.org/en/news/press-release/2021/10/21/north-macedonia-s-growth-projected-higher-but-economy-still-faces-risks>

15 <https://www.worldometers.info/coronavirus/country/macedonia/>

16 <https://ourworldindata.org/covid-vaccinations?country=MKD>

4.2. Cultural governance (administrative and institutional structure related to CCI)

In order to better understand the situation of the CCI sector during COVID-19, the situation of the sector before the crisis should be taken into account. Therefore, this section focuses on the framework of the Ministry of Culture, as a competent body responsible for the regulation, organisation and development of the cultural sector, including the CCI, in the Republic of North Macedonia.

According to the Law on Organisation and Operation of the Bodies of Government Administration¹⁷, the Ministry of Culture (MoC) of the Republic of North Macedonia is a competent government agency in the field of culture, and the activities that are performed in this body are regulated within this law.

The cultural policy framework is globally regulated with 16 laws and is presented in the National Strategy for Cultural Development 2018–2022¹⁸ and the Strategic Plan 2022-2024¹⁹. Some of the priority objectives of these documents are the democratization of culture and cultural democracy, creativity, pluralism, inclusiveness and European context, departmentalization, decentralization, improving the legislation for culture, etc.

Part of the National Strategy for Cultural Development 2018-2022 (part 4.12) is dedicated to the cultural industries, where the main directions for this sector are generally elaborated. However, no clear definition of CCI exists in the MoC and in the cultural policy framework. The main point about CCI in these documents is linked to planning an action related to mapping and creating a strategy for development of this sector. In addition, no clear action plan for this specific area was created or implemented so far in the last five years. The Strategic Plan 2022-2024 has no clear part dedicated to the CCI sector. It only briefly mentions the importance of the economic impact of culture, without clear goals and actions.

In the overall structure of the MoC, there is one unit for Creative Industries and Interdisciplinary Projects, but no clear goals and activities related to the CCI have been created or implemented in the last four years.

According to the Ministry of Culture, there are 63 national public institutions and 27 local public institutions²⁰. However, there is no clear policy framework that links these public institutions to other sectors such as tourism or IT. A set of recommendations in this regard has been provided in the Cultural Policy Review, published by the Council of Europe (2021).

17 Official Gazette of the Republic of North Macedonia No: 58/00, 44/02, 82/08, 167/10, 51/11, 96/19 and 190/1

18 National strategy for development of culture in Republic of Macedonia for the period 2018-2022 (НАЦИОНАЛНА СТРАТЕГИЈА ЗА РАЗВОЈ НА КУЛТУРАТА ВО РЕПУБЛИКА МАКЕДОНИЈА ВО ПЕРИОДОТ 2018-2022 ГОДИНА) Retrieved on 10.03.2022 from https://drive.google.com/file/d/1gfzA76RBOTS1_A00fNn62n352E3nr8kB/view

19 Strategic plan of the Ministry for Culture for the 2022-2024 period ([СТРАТЕШКИ ПЛАН НА МИНИСТЕРСТВОТО ЗА КУЛТУРА, 2022 – 2024](http://kultura.gov.mk/nacionalna-strategija-za-razvoj-na-kultura/)) Retrieved on 10.03.2022 from

<http://kultura.gov.mk/nacionalna-strategija-za-razvoj-na-kultura/>

20 Source: <http://kultura.gov.mk/ministerstvo/>

Copyright and related rights and intellectual property are regulated with the Law on Copyright and Related Rights and the Law on Industrial Property, proposed and approved by the MoC. This law has been harmonized with the European legislation, but the main challenge is related to its implementation.

According to the European Commission's Progress Report for North Macedonia for 2021, the country is moderately prepared in this field. Certain progress has been achieved in terms of harmonizing the EU acquis on copyright and the establishing of an information platform for institutions regarding the implementation of the law on data exchange for protection of intellectual property rights (IPR)²¹.

The Cultural Heritage Protection Office (CHPO), as part of the MoC, was established in 2004 as an independent governmental administrative body responsible for the protection and use of cultural heritage in North Macedonia. (More info in the Cultural Tourism section).

The North Macedonia Film Agency is an independent entity that stimulates and supports the development of the Macedonian film industry. It was established under the Film Industry Law²² and began its operations in 2014. The funds needed for the operation of the Agency are provided by the Government of the Republic of North Macedonia and from other sources defined by the Film Industry Law, such as broadcasters, cable operators, internet providers, cinema exhibitors and distributors.

4.3. Financing the cultural sector in Macedonia

The MoC is responsible for distributing public funds for culture on the basis of an annual plan, including an annual call for supporting projects of national interest, where the CCI sector is eligible to apply. In this call, the public sector, CSOs and private entities are eligible to apply.

The allocation of the overall state budget to different sectors and purposes²³ is defined by law (Annual Law on the National Budget). Culture's share in the state budget in the past four years, from 2018-2021, has ranged from 1.75% in 2018 to 1.23% in 2021. (See Table 2)

21 Source: Evropska Komisija (2021) Izveštaj za Severna Makedonija za 2021 (Progress Report for North Macedonia for 2021). Retrieved on 07.04.2022 from <https://www.sep.gov.mk/data/file/Pregovori/North-Macedonia-Report-2021-%D0%9C%D0%9A2.pdf>

22 Official Gazette of the Republic of North Macedonia No.82/2013i

23 Source: Ministry of Culture of North Macedonia (The annual budget of the Ministry of Culture of the Republic of North Macedonia includes: salaries of the public institutions, wages and allowances, i.e., daily expenses and travelling allowance for the permanently employed; other goods and services; programme expenditures (subsidies for the completion of projects in national and other cultural institutions and individual cultural activities); capital expenditures (investment activities); material expenditures of the institutions, heating of buildings, insurance of equipment, buildings, exhibits, etc.; decentralization processes with subsidies for the 33 municipalities to cover basic expenditures for the work and functions of local public institutions (block grants that include salaries, maintenance/material expenditures, programmes' expenditures, etc.); social expenditures for improvement of socio-economic conditions for those involved in the field of culture (health, social and pension insurance for independent artists and cultural workers), funds for education for talented artists and cultural professionals).

Ministry of Culture	2018	2019	2020	2021
Percentage of the total country budget	1.75%	1.37%	1.44%	1.23%

Table 2: Budget of the Ministry of Culture in relation to the entire budget of North Macedonia for the 2018-2021 period

The budget of the Ministry of Culture of the Republic of North Macedonia for 2018 was 3, 61 billion MKD or 58,59 million EUR²⁴. The budget for culture in relation to the entire budget of North Macedonia was 1.75 percent. The funds for all cultural activities were 3,3 billion MKD or 53,49 million EUR, and for the project for national interest in culture, the funds were 904 million MKD or 14,65 million EUR.

For 2019, the total budget of MoC was 3,14 billion MKD, or 50,9 million EUR²⁵. The budget for culture in relation to the entire budget of North Macedonia decreased by 0.36%, compared with the budget for 2018. The funds for all cultural activities were 2, 9 billion MKD or 47,41 million EUR, and the funds for projects of national interest in culture were 936 million MKD or 15,17 million EUR.

For 2020, the total budget of MoC was 3,46 billion MKD or 56,12 million EUR²⁶. The budget for culture in relation to the entire budget of North Macedonia was 1.44 percent, and compared to the budget for 2019, increased by 0.07 percent, whereas compared to the budget for 2018, it had decreased by 0.3 percent. The funds for financing all cultural activities in 2020 were 3,14 billion MKD (approximately 50,9 million EUR). The funds intended for financing projects of national interest in culture in 2020 were 980,1 million MKD (approximately 15,88 million EUR), which amounts to 31.2 percent of the total budget. (See Table 3).

For 2021, the total budget of the MoC was 3,27 billion MKD or 53,1 million EUR. Compared to the budget for 2020, it decreased by 0.21 percent. The budget for culture in relation to the entire budget of North Macedonia was 1.23% percent. The funds envisaged for financing projects of national interest in culture in 2021 were 970,1 million MKD (approximately 15,7 million EUR).

²⁴ Source: Ministry of Culture (2019) Izveshtaj za rabota vo 2018 godina (Annual report for 2018). Accessed via request for public nformation No. 03-24.

²⁵ Source: Ministry of Culture (2020) Izveshtaj za rabota vo 2019 godina (Annual report for 2019). Retrieved on 06.03.2022 from <https://drive.google.com/file/d/1KcUG5lzz6FtAPyPi1MNPN5WBFNphyk/view>

²⁶ exchange rate MKD/EUR: 61,695 MKD = 1 euro (National Bank mid-rate 01.03.2022)

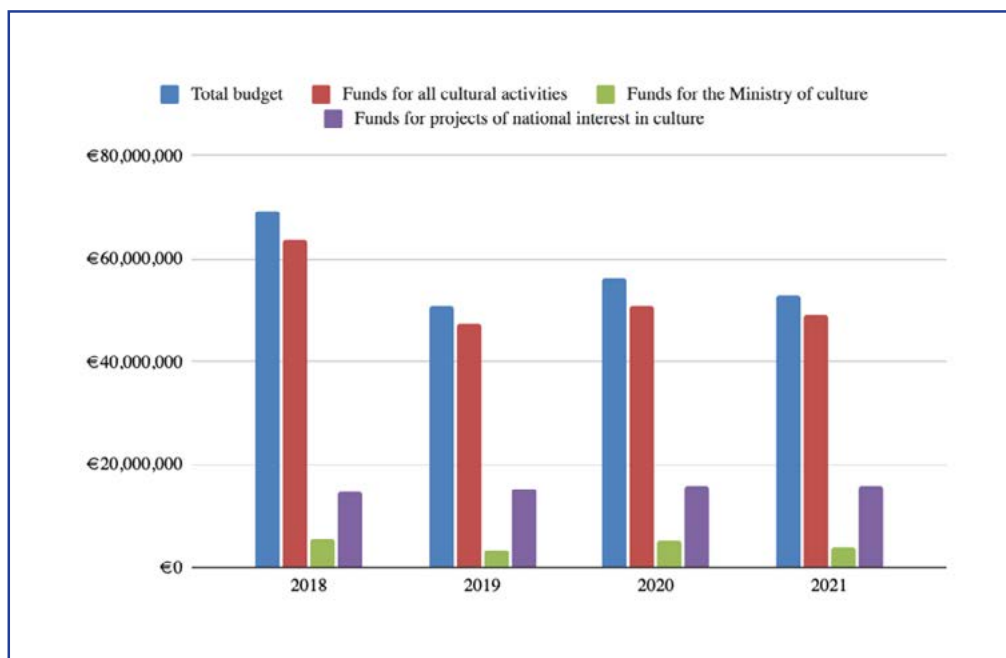


Table 3: Annual budget of the Ministry of Culture of North Macedonia (total budget, funds for all cultural activities, funds for the MoC and funds for projects of national interest) (2018-2021)²⁷

The budget of the MoC of the Republic of North Macedonia in 2022 is projected at 33,8 billion MKD (62.69 million EUR). The budget for culture in relation to the entire budget of North Macedonia is projected at 1.49% percent, and compared to the budget for 2021, it has been increased by almost 10 million EUR, or 0.26%. The funds envisaged for financing projects of national interest in culture in 2022 is over 17 million EUR, which is over 1.5 million EUR more for this purpose than in 2021.²⁸

The total budget of the MoC changed significantly (decreasing) in the 2018-2019 period. (See Table 3). The largest portion of the annual budgets of the MoC in the 2018-2021 period was distributed for cultural activities related to the public (national and local) institutions, where costs related to salaries, maintenance, programmes, etc. are included. The funds for financing projects of national interest in culture in the 2018-2021 period remained similar with some slight changes. For example, in 2020, the amount for projects of national interest was 980,1 million MKD (15,88 million EUR) and for 2021, the amount is 970,1 million MKD (15,7 million EUR).

Sources: for 2017: Ministry of Culture, Request for public information No. 03-24.

for 2018: Ministry of Culture (2019) Izveshtaj za rabota vo 2018 godina (Annual report for 2018). Accessed via request for public information, No. 03-24.

for 2019: Ministry of Culture (2020) Izveshtaj za rabota vo 2019 godina (Annual report for 2019). Retrieved on 06.03.2022 from <https://drive.google.com/file/d/1KcUG5Izz6FtAPyPi1IMNPN5WBFNphyk/view>

for 2020: Ministry of Culture (2021) Izveshtaj za 2020 godina (Annual report for 2020). Retrieved on 06.03.2022 from <https://itadvance.mk/wp/wp-content/uploads/2021/12/Izvestaj-za-rabotata-na-Ministerstvoto-za-kultura-vo-2020-godina.pdf>

for 2021: Council of Europe (2020) Cultural Policy Review of the Republic of North Macedonia: Towards a Strategy for Heritage and the Development of Culture and Creative Industries (Online Peer Review, December 2020). Retrieved on 06.03.2022 from <https://rm.coe.int/cultural-policy-review-of-the-north-republic-of-macedonia-/1680a1bd28>

²⁸ Source: Ministry of Culture (2021) Stefoska: 10 milioni evra povekje za kulturata vo 2022 godina (Stefoska: 10 milion euro more for the culture in 2022). Retrieved on 06.03.2022 from <https://kultura.gov.mk/stefoska-10-milioni-evra-poveke-za-kulturata-vo-2022-godina/>

4.4. Financing CCI before and during the COVID-19 crisis

4.4.1. The Ministry of Culture

The only instrument of the MoC of North Macedonia for supporting the CCI sector was created in 2017 which was the annual call for support of projects of national interest in the field of the creative industries. This call was open only for design (graphic, fashion, industrial design, and design of products). The projects supported by this instrument receive minimal funding, which is enough to only cover the basic material needs (funds available per applicant: 500–1,000 EUR). (See Table 4)²⁹

CREATIVE INDUSTRIES FUNDED BY MoC IN 2017	Allocated funds Individual Grants in euro	Entities Grants in euro	Number of supported projects
Graphic design	2 465,5	567,7	6
Industrial design	4 217,3	937,2	7
Product design	12 327,6	10 219	38
Fashion design	14 598,5	2 595,3	21
TOTAL	33 609	14 319	72

Table 4: Ministry of Culture Fund for Creative Industries in 2017

In total, 72 projects were supported in 2017 in the field of the creative industries, in total an amount of 47 928 EUR. The MoC provided information³⁰ about 283 projects supported over a five-year period (2013–2017) in this sector with a total amount of 414,634 EUR. This public support of the creative industries is not significant, thus indicating a lack of awareness concerning the potential of the sector to support economic and social development.

Since 2017, there are no clear separate financial instruments that support CCIs (apart for the cinema industry).

Since 2017, the CCI sector in North Macedonia has been supported by the MoC through the Annual Call for projects of national interest. The distribution of the funds for projects of national interest goes through an annual call, with the results of this call being publicly announced. However, the available data on this call from the official website of the MoC does not correspond with the information collected from the MoC's annual report. There is a lack of a systematic approach towards data collection, classification, systematization, and analyses of the cultural sector in North Macedonia within the MoC.

The amount that has been distributed to the CCI, through the budget of the MoC for the projects of national interest per subsectors for 2018, 2019, 2020 and 2021, according to the classification from the Ministry of Culture, is provided in Annex II.

²⁹Source: Ministry of Culture, request for public information No. 03-24

³⁰ Ministry of Culture, the press conference held on 4th February 2017, Retrieved on 06.03.2022 from <http://www.kultura.gov.mk/index.php/odno-si-so-javnost/novosti/2784-poddrshka-kreativnl-Industrll>

The larger proportion of this financial instrument of the MoC in 2018³¹ went to public institutions, amounting to 214,9 million MKD (3,48 million EUR), with the largest portion being given to the Dramatic Arts. The CCOs, associations, and business entities were supported with 141,2 million MKD (2,28 million EUR), with the largest proportions of that going to Music and the Performing Arts and Literature and Publishing. Within the international cooperative projects (including UNESCO-supported projects), as part of the same call, the national institutions were supported with 22 million MKD (357,832 EUR), with the biggest proportion going to Theatres. The other cultural operators (state and non-state, including individuals) were supported with 26,36 million MKD (427,428 EUR) with the biggest amount going to Music, Performing Arts and Folklore. (See Annex II, 2018)

In 2019, the budget for supporting projects of national interest increased, compared to 2018, with an amount of 32,9 million MKD (518,680 EUR)³². The larger amount was granted to the public institutions with 339,2 million MKD (5,5 million EUR), where the biggest part went to Music and Performing Arts, Dramatic Arts, and Cultural Heritage. The CCOs, associations, and business entities were supported with 177,6 million MKD (2,87 million EUR), where the larger amount went to Literature and Publishing, and Music and Performing Arts. The multilateral cooperative projects (including UNESCO projects) managed by the national institutions were supported with 20,4 million MKD (331,069 EUR), where the biggest amount was given to Theatre. The other cultural operators (state, non-state including individuals) were supported in the amount of 28,26 million MKD (458,142 EUR), with the biggest amount being given to Literature and Publishing³³. (See Annex II, 2019)

In 2020³⁴, the budget for supporting projects of national interest led by public institutions increased, from 339,2 million MKD (5.49 million EUR) in 2019 to 451,3 million MKD (7,31 million EUR), in which 91 million MKD or 1,47 million EUR were spent on building new infrastructure, reconstruction, and the adaptation of existing infrastructure. The larger part of the projects of national interest led by public institutions was distributed to the Protection of Tangible and Audio-visual Heritage and Dramatic Arts. The budget for projects of national interest led by CSOs, associations and business entities, increased significantly compared to 2019 (177,6 million MKD or 2,8 million EUR), to 251,3 million MKD (4,07 Million EUR). The larger part of this amount went to Music and Musical Performing Arts, and the Literature and Publishing Sector. The total amount of 47,63 million MKD (772,160 Euro) was granted for international cooperation managed by “other” cultural operators (state, non-state, including individuals) and 24,88 million MKD (403,343 euro)³⁵ for national institutions. (See Annex II, 2020)

31 Ministry of Culture (2018) Godishna progama na Ministerstvoto za kultura i rezultati od godishniot konkurs za proekti od nacionalen interes vo kulturata za 2018 godina (Annual programme of the Ministry of Culture and results of the annual competition for projects of national interest in culture for 2018). Retrieved on 06.03.2022 from <http://arhiva.kultura.gov.mk/index.php/odnosi-so-javnost/soopstenija/3536--2018>

32 Source: Ministry of Culture (2019) Soopshtenie za Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2019 godina (Announcement of the results of the Annual competitions for support of projects of national interest in culture for 2019). Retrieved on 06.03.2022 from: [LINK](#)

33 Source: Ministry of Culture (2019) Soopshtenie za Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2019 godina (Announcement of the results of the Annual competitions for support of projects of national interest in culture for 2019). Retrieved on 06.03.2022 from: [LINK](#)

34 Source: Ministry of Culture (2020) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2020 godina (Results of the Annual call for financing projects of national interest in culture for 2020). Retrieved on 06.03.2022 from: [LINK](#)

35 Source: Ministry of Culture (2020) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2020 godina (Results of the Annual call for financing projects of national interest in culture for 2020). Retrieved on 06.03.2022 from: [LINK](#)

In 2021, the larger portion of the same financial instrument went to the national and local public cultural institutions in amount of 301,3 million MKD (4,8 EUR)³⁶, and in the cultural heritage sector and museums, and the protection of tangible and audio-visual heritage. The CCOs, associations, and business entities were supported with 139,77 million MKD (2,26 million EUR). The larger portion was distributed to Literature and Publishing. The international cooperation projects (including UNESCO projects) managed by the national institutions were supported with an amount of 7,89 million MKD (127,941 EUR), with the biggest amount being given to Folklore. The other cultural operators (state, non-state, including individuals) were supported with 27,99 million MKD (452,849 EUR), with the biggest amount given to Macedonian Cultural Centres abroad and for Music and Performing Arts. (See Annex II, 2021)

To summarize, the tendencies and priorities in supporting the projects of national interest, including the projects from the CCI, are not consistent and thus vary from year to year, as well as being not directly related to the strategic goals of the MoC. In the 2017/2021 period, which is the subject of this research, the financial assistance for the CCI by the MoC is not clearly defined. The distribution of public funds has been achieved in a “little bit for everyone” manner, without a clear vision or strategic orientation. The needs of the CCI sector have not been considered when making decisions.

The Cultural Policy framework related to CCI in North Macedonia, except for the film industry, is not clearly defined, and thus requires serious further consideration and development. Most of the decisions are made on an ad hoc basis, without clear strategic orientation. Another conclusion that can be drawn, based on the available data (desk research, survey, focus groups and interviews)³⁷ is that the political influence in the cultural sector is still very significant. This is reflected and most evident in the way the public funds are allocated. The main feature of how these funds are used is a lack of transparency, no clear criteria, indicators, and procedures, and the presence of nepotism (entities and individuals that are close to the ruling political parties almost always have priority in receiving public funds).

COVID-19 did not have a high impact on the budget of the MoC for CCI. No clear instruments were created within the MoC to mitigate the COVID-19 crisis in the creative and cultural sector, and the existing ones are very limited in terms of the number of benefits, funds allocated, and duration.

4.4.2. European Commission Support (Creative Europe, IPA, Media)

In addition to the annual call for projects of national interest, the MoC is contributing to the projects supported by Creative Europe, where the CCI sector is represented as well. A total of 58³⁸ projects with

³⁶ Source: Ministry of Culture (2021) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2021 godina (Results of the Annual call for financing projects of national interest in culture for 2021). Retrieved on 06.03.2022 from: [LINK](#)

³⁷ Desk research, a survey, focus groups and interviews with the representatives from the CCS in North Macedonia were conducted in the February-May 2022 period, as part of the research activity aiming at assessing the impact of COVID-19 on the Cultural and Creative Industries (CCIs) in North Macedonia and providing recommendations for improving the situation as requested by the EU Delegation to the Republic of North Macedonia.

³⁸ Creative Europe Culture and MEDIA supported 47 projects that include cultural operators from the Republic of North Macedonia in the C 2015-2021 period.

Macedonian partners were supported by the Creative Europe Programme in the 2017-2021 period (see Tables 5 and 6). The organisations from North Macedonia have mainly been co-organisers in the Creative Europe cooperation projects. In addition, publishing entities have been the most numerous beneficiaries (literary translation projects) of the Creative Europe cooperative projects so far.

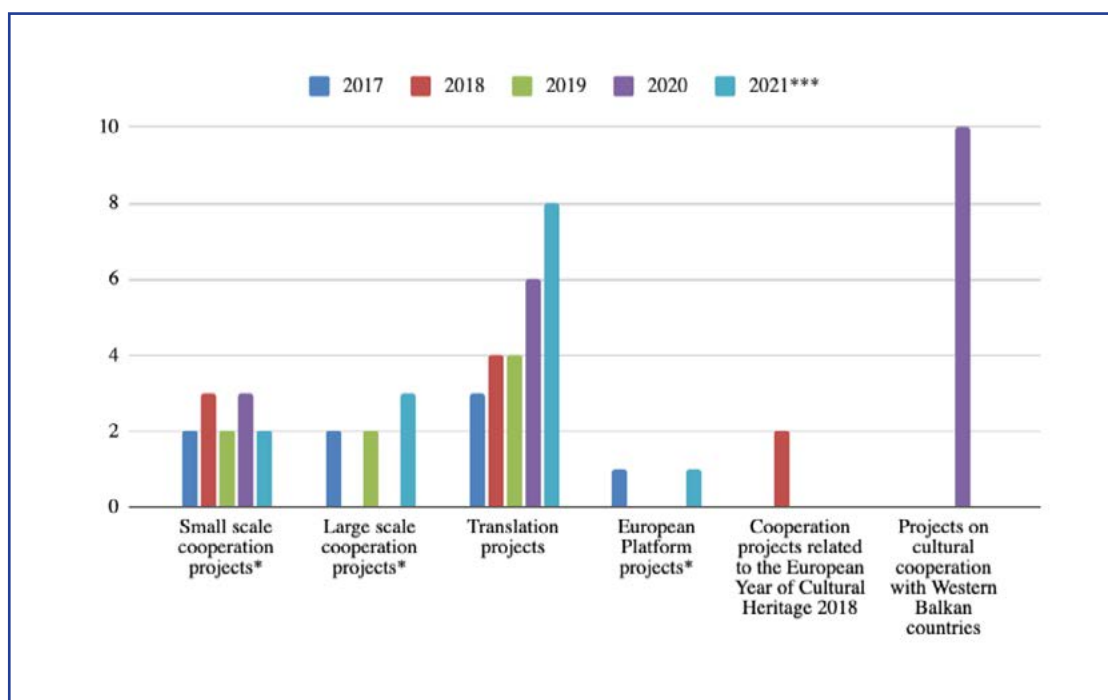


Table 5: Number of projects with Macedonian partners supported by Creative Europe 2017-202039

Note: *** The data provided by MoC for 2021 is titled Cooperation projects with no reference to whether they are medium or large-scale. Only data on small-scale cooperation projects is noted.

39 Source: Ministry of Culture (2021) Creative Europe. Retrieved on 06.03.2022 from <https://kultura.gov.mk/%d0%ba%d1%80%d0%b5%d0%b0%d1%82%d0%b8%d0%b2%d0%bd%d0%b0-%d0%b5%d0%b2%d1%80%d0%be%d0%bf%d0%b0/>; Ministry of Culture (2021) Kreativna Evropa (Doma): Potprograma Kultura, Poddrzhanjani proekti 2014-2020 (Creative Europe (Home): Sub-programme Culture, Supported projects 2014-2020). Retrieved on 06.03.2022 from <https://drive.google.com/file/d/1lj9so1K055CPdZPns0sCdYq-8pLiHayc/view>

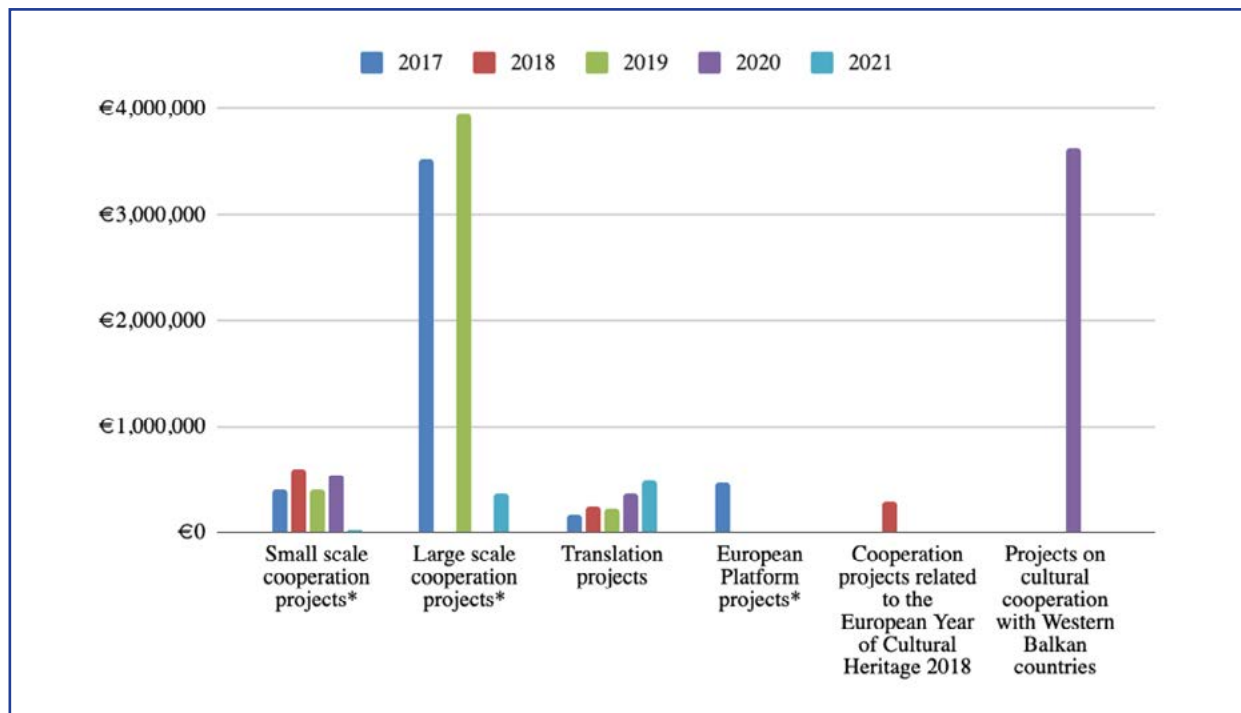


Table 6: Creative Europe support for projects that involves Macedonian partners for the 2017-2020 period⁴⁰

Note: * The Creative Europe grant applies to all partners involved in the project. The Creative Europe office does not have insight into the distribution of funds between the partners. Traditionally, the funds for the partners from North Macedonia range from 3.000 to 20.000 euros per year.

The contribution from the MoC in these projects is administrated through an open call for co-financing of the organisations that received a grant from the Creative Europe Programme.

In 2020, under the EU Special Pilot Action dedicated to Cooperation with and in the Western Balkans, 10 projects have been selected with 12 cultural organisations (public organisations and CSOs) from the Republic of North Macedonia, from which two are lead partners. The total amount granted to the Macedonian partners from the EU in this call is 414,218 EUR, while the contribution from the MoC is 18.379 EUR⁴¹. The average proportion of the contribution from the MoC in these projects is 4.4%, which is lower than the necessary co-financing portion (20%). (See Table 7)

40 Source: Ministry of Culture (2021) Creative Europe. Retrieved on 06.03.2022 from <https://kultura.gov.mk/%d0%ba%d1%80%d0%b5%d0%b0%d1%82%d0%b8%d0%b2%d0%bd%d0%b0-%d0%b5%d0%b2%d1%80%d0%be%d0%bf%d0%b0/>; Ministry of Culture (2021) Kreativna Evropa (Doma): Potprograma Kultura, Poddrzhani proekti 2014-2020 (Creative Europe (Home): Sub-programme Culture, Supported projects 2014-2020). Retrieved on 06.03.2022 from <https://drive.google.com/file/d/1lj9so1K055CPdZPns0sCdYq-8pLiHayc/view>

41 Source: Ministry of Culture (2021) Creative Europe. Retrieved on 03.06.2022 from <https://kultura.gov.mk/%d0%ba%d1%80%d0%b5%d0%b0%d1%82%d0%b8%d0%b2%d0%bd%d0%b0-%d0%b5%d0%b2%d1%80%d0%be%d0%bf%d0%b0/>; Ministry of Culture (2021) Kreativna Evropa (Doma): Potprograma Kultura, Poddrzhani proekti 2014-2020 (Creative Europe (Home): Sub-programme Culture, Supported projects 2014-2020). Retrieved on 03.06.2022 from <https://drive.google.com/file/d/1lj9so1K055CPdZPns0sCdYq-8pLiHayc/view>

	Total sum of EU grants for all partners (in EUR)	Total grant sum for the partner from N. Macedonia (in EUR)	Total sum of grants awarded by MoC (in EUR)	Average percentage of the awarded MoC grant from the total grant**
Projects for cultural cooperation with Western Balkan countries*	2.393.910	414.218	18.379	4.4%

Table 7: Ministry of Culture's contribution to projects for cultural cooperation with Western Balkan countries

Note: * 6 out of 7 projects that apply for support from the MoC, were awarded a grant.

Note: ** Per project, the support from the MoC ranges from 2 to 16% of the total grant awarded to the partners in N. Macedonia

In 2021, Creative Europe supported a total of 14 projects from North Macedonia, where the majority were translation projects (eight), with the total amount granted for the partners from North Macedonia being 886,449. EUR. The contribution of the MoC to these projects was 110,252 EUR⁴².

The Instrument for Pre-Accession Assistance (IPA I, II, and III) in North Macedonia is another instrument that supports, among others, projects from the CCI sector. IPA II brought 633 million EUR to the country (214 million EUR already having been spent in 2019)⁴³. The data regarding the number of projects that involved CCI organisations and entities is not available; however, according to the Cultural Policy Review⁴⁴, the use of Instrument of Pre-accession Assistance (IPA) resources to fund cultural and creative industry projects in North Macedonia, in line with the cultural policy objectives to support heritage and the development of the culture and creative sectors (CCS), could be reinforced

From the available data, it can be concluded that the financial assistance from the European Commission for the CCI sector in North Macedonia is significant and very important. Without this financial support, many CCI entities and sub-sectors would face existential problems. The most vivid example in this respect is the independent cultural scene, especially from the performing arts field and the publishing sector which have been the greatest beneficiaries of this support.

42 Source: Ministry of Culture, Request for public information No. 03-24

43 Source: Ministry of Finance of North Macedonia, available at: <https://finance.gov.mk/instrument-for-pre-accession-assistance/?lang=en>

44 Council of Europe (2020) Cultural Policy Review of the Republic of North Macedonia: Towards a Strategy for Heritage and the Development of Culture and Creative Industries (Online Peer Review, December 2020). Retrieved on 06.03.2022 from <https://rm.coe.int/cultural-policy-review-of-the-north-republic-of-macedonia-/1680a1bd28>

4.4.3. The North Macedonia Film Agency

In addition to the Ministry of Culture, the North Macedonia Film Agency supports the development of the Macedonian film industry, having two open calls during the year, with the annual budget of the Agency for 2018-2022 being displayed in Table 8. (See Table 8)

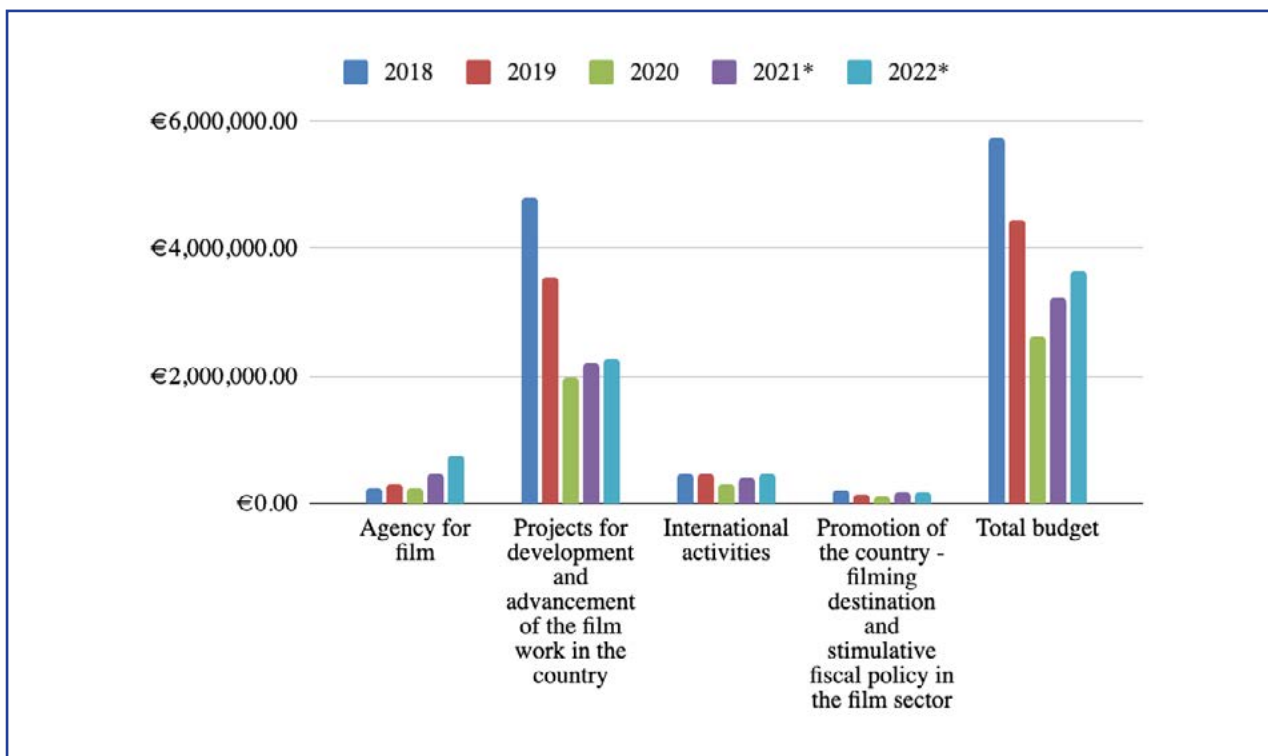


Table 8: North Macedonia Film Agency annual budget (Total budget, Funds for the Agency, Fund for Projects, Fund for international activities and funds for promotion) 2018-2022

Note: The budget of the North Macedonia Film Agency for 2022 is a projected one and not the final.

In 2018, the total budget of the agency was 353,91 million MKD (5,73 million EUR)⁴⁵ (see table 9), and a total of 13 future movies (five national movies and majority co-productions and eight minority coproductions) were supported. A total of 71 projects (including short feature movies (14), domestic and international festivals (17), documentary movies (4), and the production of audio-visual products (3), were supported. (See Table 9)

⁴⁵ Source: Agency for film of the Republic of North Macedonia (2019) Godishen izveshtaj za robotata 2018 (Annual report 2018). Retrieved on 06.03.2022 from <http://filmfund.gov.mk/wp-content/uploads/2020/04/Godisen-izvestaj-2018.pdf>

In 2019, the total budget of the film agency decreased to 274,89 million MKD (4,45 million Euro)⁴⁶, decreasing by 1,28 million EUR compared to the budget for 2018. In 2019, a total of 16 feature films were supported, as well as 17 festivals, one animated movie, and no products from the audio-visual field. A total of 60 projects were supported.

In 2020, the total budget of the film agency dramatically decreased to 162 million MKD (2,62 million EUR)⁴⁷, decreasing by 1,82 million EUR compared to 2019. 10 feature films, 22 festivals, and a total of 45 projects were supported. In 2021, the budget increased again to 198,62 million MKD (3,21million EUR)⁴⁸, by an amount of 592,076 EUR compared with 2020, and for 2022, it is projected to be 225,65million MKD (3,65 Million EUR⁴⁹).

From the available data from the North Macedonia Film Agency (the data for supported projects in 2021 was not available since the report was in progress), it is evident that after 2019, the overall budget of the Film Agency decreased, and therefore the number of projects supported likewise decreased from 71 in 2018 to 45 in 2020. 2020, during the COVID-19 crisis, was the year with the lowest budget for the film industry and with the smallest number of projects supported, compared with 2018 and 2019.

Regarding the overall budget of the Agency, it is also evident that the proportion of costs related to the agency (salaries, etc.) increased from 4.1% in 2018 to 14.3% in 2021, and for 2022, it is projected to increase to 20.3%.

46 Source: Agency for film of the Republic of North Macedonia (2020) Godishen izveshtaj za rabotata 2019 (Annual report 2019). Retrieved on 06.03.2022 from <http://filmfund.gov.mk/wp-content/uploads/2020/11/%D0%B3%D0%BE%D0%B4.%D0%B8%D0%B7.%D0%B0%D1%84%D1%80%D0%BC-2019.pdf>

47 Source: Agency for film of the Republic of North Macedonia (2021) Godishen izveshtaj za rabotata 2020 (Annual report 2020). Retrieved on 06.03.2022 from: [LINK](#)

48 Source: Agency for film of the Republic of North Macedonia (2020) Finansiski plan za 2021 (Financial plan for 2021). Retrieved on 06.03.2022 from <http://filmfund.gov.mk/wp-content/uploads/2021/02/Finansiski-plan-na-Agencija-za-film-za-2021-god.pdf>

49 Source: Agency for film of the Republic of North Macedonia (2021) Finansiski plan za 2022 (Financial plan for 2022). Retrieved on 06.03.2022 from: [LINK](#)

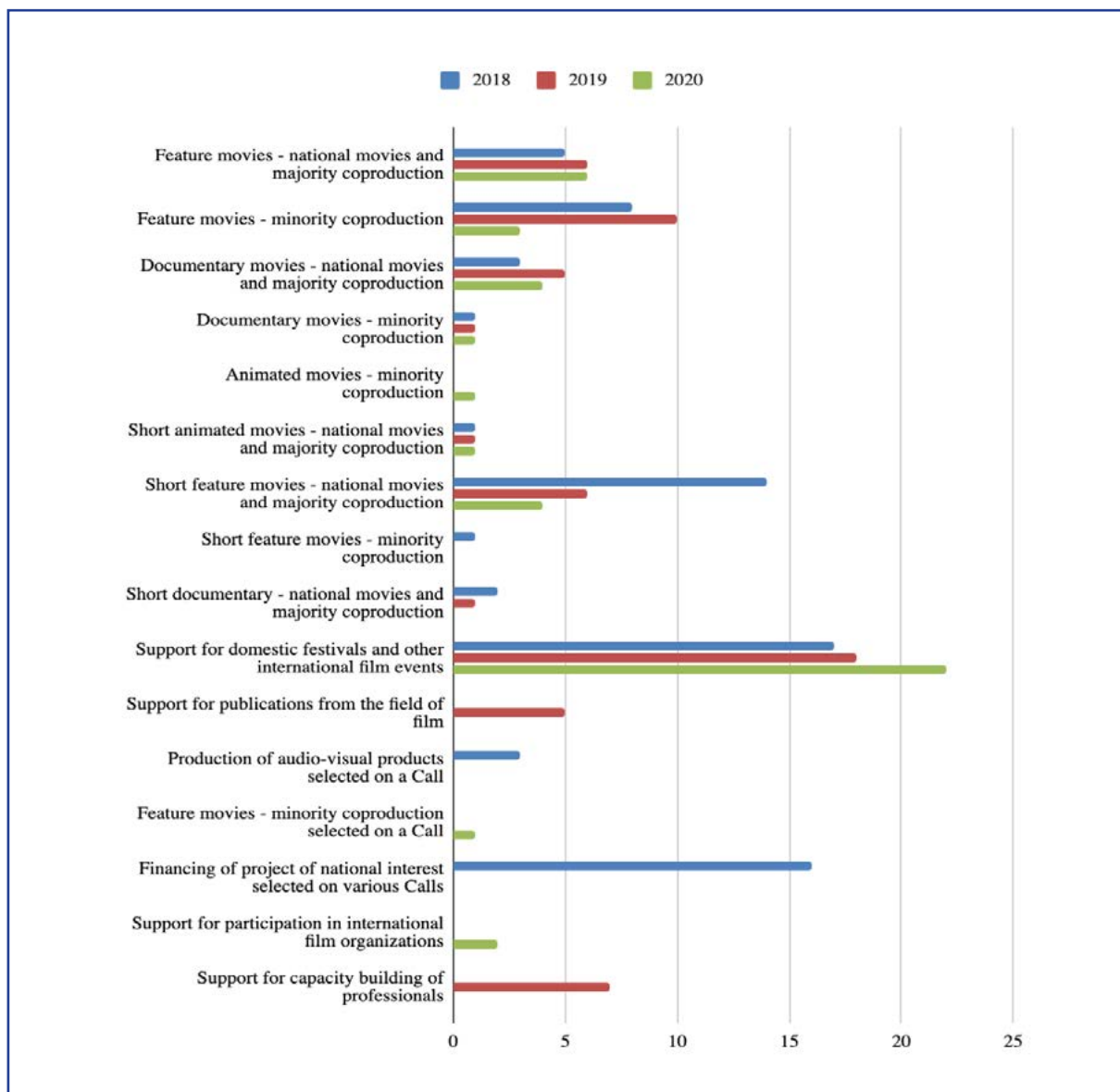


Table 9: Number of projects supported by the North Macedonia Film Agency (2018-2020)

The Media programme of the European Commission and the Euroimage programme also play a valuable role in supporting film projects in North Macedonia. In 2019 and 2020, five projects (each year) were supported with a total amount of 107,873.94 euro from the Media programme⁵⁰, and four projects with a total amount of 350,588 EUR from Euroimage⁵¹ in 2020.

50 Source: 2019: Agency for film of the Republic of North Macedonia (2020) Godishen izveshtaj za rabotata 2019 (Annual report 2019). Retrieved on 06.03.2022 from <http://filmfund.gov.mk/wp-content/uploads/2020/11/%D0%B3%D0%BE%D0%B4.%D0%B8%D0%B7.%D0%B0%D1%84%D1%80%D0%BC-2019.pdf>; 2020: Agency for film of the Republic of North Macedonia (2021) Godishen izveshtaj za rabotata 2020 (Annual report 2020). Retrieved on 06.03.2022 from: [LINK](#)

51 Source: Agency for film of the Republic of North Macedonia (2021) Godishen izveshtaj za rabotata 2020 (Annual report 2020). Retrieved on 06.03.2022 from: [LINK](#)

In summary, the establishment of the North Macedonia Film Agency provided independence for this sector from the MoC, and it has built its own strategy for the development of this sector. Public support for activities related to the film industry also increased, and transparency has also improved. However, according to the data available from the research, political influence is still significant in this agency. As well, many young independent filmmakers believe that the entities and individuals that have access to these funds are limited and those who have are always the ones that are close to the ruling party.

4.4.4. International community

In North Macedonia, the Embassy of USA, the German Embassy, the Embassy of the Netherlands, the French Cultural Centre, Goethe Institute, Japanese Embassy, and other entities are supporting the CCI. The available data usually provides information on the overall support for the CSO sector in North Macedonia, and in most cases it is difficult to find the exact figures related to the CCI support. However, the support of the international community in North Macedonia is visible, and is relevant and important for some CCIs.

4.5. Problems and needs of the CCI sector before and during the COVID-19 crisis

4.5.1. Classification

Thus far, no clear definition and understanding concerning the CCI has been developed among the public authorities in North Macedonia have. Moreover, the classification of the sector depends on such an understanding of the CCI sector, which makes the situation even more complicated. The cultural and creative industries are also difficult to classify because they are interconnected with other sectors.

Given the multi-dimensional nature of culture, statisticians use various methodologies which reflect the classifications that are specific to statistical areas. For instance, when analysing cultural employment, we need to classify the sectors of employment and occupations; for trade statistics, goods and services classifications are used; meanwhile, cultural participation is surveyed using a list of culture-specific activities. All the cultural items, categories and codes used in statistical language have been sorted for each area to form the theoretical scope of culture statistics. However, 'practical' coverage of culture statistics can differ somewhat from the theoretical scope and vary between statistical domains.

The national codes usually differ from the European Statistical System Network on Culture (ESSnet). For example, a total 34 of codes are included in the ESSnet-Culture statistics.

In North Macedonia, and in the existing concept, the classification system for the cultural domain includes 40 codes (See Table 10) The organisational form of the legal entities has nine different codes (See Table 11), and the classification of entities based on the number of employees has four groups (See Table 12).

Sector	CODE OF ACTIVITY	ACTIVITY NAME
PUBLISHING	58.11	Publishing of books
	58.13	Publishing of newspapers
	58.14	Publishing of journals and periodicals
	58.19	Other publishing activities
	63.91	News agencies activities
	74.30	Translation and interpretation services
	47.61	Retail sale of books in specialized stores
MUSEUMS, LIBRARIES AND HERITAGE	91.01	Library and archives activities
	91.02	Museum activities
	91.03	Maintenance of historical sites, buildings and similar tourist monuments
MOVIE	59.11	Motion picture, video and television programme production activities
	59.12	Motion picture, video and television programme post-production activities
	59.13	Motion picture, video and television programme distribution activities
	59.14	Motion picture projection activities
	77.22	Renting of video tapes and disks
ARCHITECTURE	71.11	Architectural activities
MUSIC, VISUAL AND PERFORMING ARTS	90.01	Performing arts
	90.02	Auxiliary activities within performing arts
	90.03	Artistic creation
	90.04	Activities of cultural manifestations
	59.20	Sound recording and music publishing activities
	47.63	Retail sale of music and video in specialized stores
	18.20	Reproduction of recorded media
	85.52	Art education
COMPUTER PROGRAMMES AND GAMES	58.21	Publishing of computer games
	62.01	Computer programming
DESIGN	74.10	Specialized design activities
PHOTOGRAPHY	74.20	Photographic activities
ELECTRONIC MEDIA	60.10	Radio programme broadcasting
	60.20	Television programming and broadcasting activities
	63.12	Web site services (Internet portals)
ADVERTISING AND MARKETING COMMUNICATIONS	70.21	Communication and public relations activities
	73.11	Advertising agencies
	73.12	Media presentation
ARTISTIC AND TRADITIONAL CRAFTS	15.12	Manufacture of luggage and handbags, leather products and belts
	16.29	Manufacture of other products of wood, cork, straw and plaiting materials
	23.41	Production of ceramic household and decorative objects
	23.49	Production of other ceramic products
	32.12	Manufacture of jewellery and related articles
	32.13	Manufacture of imitation jewellery and related articles

Table 10: Classification of the Creative and Cultural Industries – sectors and activities in North Macedonia

CODE	DESCRIPTION OF CODE
025	Public institution
039	Public entities -other
053	Trade company - Limited Liability Company
054	Trade company - Limited Liability Company founded by One Person
055	Trade company - Joint Stock Company
059	Trade company - Sole Proprietor
103	Civil society organisation in culture
109	Civil society organisation - other fields
132	Independent performers of activity – Crafts

Table 11: Classification of the Creative and Cultural Industries – sectors and activities in North Macedonia

NUMBER OF EMPLOYEES	CLASSIFICATION OF ENTITY
0-9	MICRO-SIZE entity
10-49	SMALL-SIZE entity
50-249	MEDIUM-SIZE entity
≥ 250	LARGE entity

Table 12: Size classification of entities based on the number of employees

In total, four codes from the ESSnet-Culture statistics are not included in the North Macedonian classification. Namely, 47.62 Retail sale of newspapers and stationery in specialised stores, 18.10 Printing and service activities related to printing, 58.12 Publishing of directories and mailing lists and 32.2 Manufacture of musical instruments are part of ESSnet and are not part of the North Macedonian classification.

In addition, 10 cultural domains and/or codes included in the North Macedonian conception are not part of ESSnet (See Table 13).

Sector	CODE OF ACTIVITY	ACTIVITY NAME
ARTISTIC AND TRADITIONAL CRAFTS	15.12	Production of luggage and handbags, leather products and belts
	16.29	Production of other products of wood, cork, straw and plaiting materials
	23.41	Production of ceramic household and decorative objects
	23.49	Production of other ceramic products
	32.12	Manufacture of jewellery and related articles
	32.13	Manufacture of imitation jewellery and related articles
ADVERTISING	70.21	Communication and public relations activities
	73.12	Media presentation
ELECTRONIC MEDIA	63.12	Web site services (Internet portals)
COMPUTER PROGRAMMES AND GAMES	62.01	Computer programming

Table 13: Domains and codes included in the North Macedonian conception, which are not part of the ESSnet

On a practical level, the current type of classification is problematic due to several reasons. For example, the first challenge is to maintaining statistics on the CCI, as not all CCI subsectors are included in the existing classification. Without an updated and modified system of classification, no relevant data could be collected, which directly and negatively influences the process of policymaking; without relevant data, no planning process could take place. In addition, the existing classification cannot be easily compared with other countries, because it is not harmonised with the standard European classification.

Secondly, and more importantly, many CCI entities are facing bureaucratic problems in terms of registration, problems in acquiring an adequate code in the field of operation, and are struggling to define their professions in ESA. For example, there is no code for event management or for the gaming industry. These subsectors are forced to register under other activities and codes which determine their taxation.

The first example is the events industry, who need to register using code 90.02, as a supportive activity in performing arts. This goes together with catering, security, etc. However, the event industry is not only focused on performing arts, but also on sport, education, etc. No proper codification and regulation of this subsector exists. Another example is the game industry. Entities in this subsector need to register as a computer programming company, having serious problems defining their professions. Even further, a game designer has to register as a computer graphics programmer because such a code does not exist in the existing classification. Another example refers to the fact that a game designer needs to be registered as a computer systems designer, since there is no other option.

In general, the existing classification system in North Macedonia does not reflect the modern trends or meet needs of the CCI. Thus, there is a need for a redefined classification, making it more flexible and adaptable to the changes taking place in the CCI sector.

So far, no understanding or support from government has been provided in terms of solving this issue, despite many efforts from the CCI representatives in changing this framework.

4.5.2. Protecting authors' rights and related rights

According to the data available from the interviews and focus groups, the regulation of copyright and related rights and intellectual property in North Macedonia, and in particular, the implementation of the existing legislative framework, faces many challenges. For example, in the music sector which is related directly to ZAMP⁵², the enforcement of copyright remains ineffective despite the laws and existing tools used in the regulation of this sector (for example, the software used for screening is outdated). The entire process is not transparent and leaves much room for speculation and corruption. Another example regarding the challenging situation in terms of the protection of copyright and related rights is in the field of the production of audio and video content and products. Namely, in this sector, during the COVID-19 crisis, the number of pirate IP TV stations that began to operate and sell their services in North Macedonia illegally

⁵² Musical Copyrights Society of Macedonia – ZAMP is an organisation for collective management of copyright music rights, in accordance with the Law on Copyright and Related Rights, the Statute, and the authorization from the Ministry of Culture of the Republic of Macedonia. ZAMP protects the rights of composers, lyricists, arrangers and other right-holders of music works of all genres on territory of the Republic Macedonia. Source: ZAMP (Musical Copyrights Society in Macedonia) (N.A) About us. Retrieved on 07.04.2022 from https://zamp.com.mk/?page_id=7

grew rapidly. All of these directly and negatively influence this subsector, and none of the public authorities in North Macedonia are taking clear steps towards regulating this issue. The sector tried to negotiate this issue with the Ministry of Culture, but it declared itself incompetent.

The segment of copyright and related rights and intellectual property is even more problematic due to the overall situation of the judicial system in North Macedonia. According to the results from the focus groups and the interviews within CCI sector⁵³, the judicial system is slow, bureaucratized, and still highly corrupt. If one wants to exercise their rights, the process takes a very long time and is rather expensive. According to the same data, the trust in the judiciary system is very low, and the capacities of the individuals and the entities in most of the CCI subsectors are very weak, so the question of protecting copyright and related rights is still open, with some intervention in this field from the public authorities being needed.

4.5.3. Online sales (e-commerce)

North Macedonia is part of the global movement regarding the rapid growth in e-commerce, which has been further boosted by the COVID-19 crisis. According to the president of the Macedonian E-commerce Association and ex-Minister of Finance, Ms. Nina Angelovska (2021), the pandemic had a strong influence on e-commerce, driving a large number of businesses and individuals to adapt by switching from traditional to online commerce⁵⁴.

The majority of the CCI are aware of this trend and the potential of online sales for their growth

Yet, there are some challenges that the CCI and other business entities in North Macedonia are facing, such as a lack of knowledge and understanding of e-commerce, the lack of a skilled workforce, lack of awareness, lack of a habit to shop online, and a lack of trust in local online shops or companies, as well as disloyal competition with the high informal economy, the insufficient use of payment cards, delivery costs and other issues (ibid).

According to the State Statistical Office (2020)⁵⁵, 79.9% of households had access to the Internet. 81.4% of citizens were internet users (aged 15 to 74), while 96.9% of business entities with 10 or more employees had Internet access. According to the data from the European Commission (EC) contained in the 2020 annual North Macedonia Progress Report, 56 companies still face restrictions on fixed broadband access (19.4% in 2018 compared to 17.2% in 2014).⁵⁶

53 Focus groups and interviews with the representatives from the CCS in North Macedonia were held in the March-May 2022 period, as part of the research activity aiming at assessing the impact of COVID-19 on the Cultural and Creative Industries (CCIs) in North Macedonia and providing recommendations for improving the situation as requested by the EU Delegation to the Republic of North Macedonia.

54 Source: SEE NEWS (2022) Intervju with Nina Angelovska, Retrieved on 10.05.2022 from <https://seenews.com/news/interview-n-macedonias-e-commerce-firms-need-to-use-pandemic-driven-growth-to-expand-further-753924>

55 State Statistical Office. Retrieved on 5.03.2022 from <https://cutt.ly/Lb8T6No>

56 North Macedonia 2020 Report, October (2021). European Commission. Retrieved on 01.09.2022 from: <https://cutt.ly/Cb8Yrbl>

According to the Country Report and Roadmap for Digital Agenda advancement in North Macedonia (2021)⁵⁷, the state provides a limited number of e-services. According to that same report, the performance of e-government services in Republic of North Macedonia is lower than the average achieved in the EU in 2010. Often, citizens do not have enough information about electronic services, and it is not even possible to obtain comparative data on the use of e-services in relation to the over-the-counter use of services—i.e. with a physical presence.⁵⁸ Even during a pandemic, citizens prefer to receive the services over the counter, and this is evidenced by the data on the total number of registered users of the e-services portal, which represents only about 1.5% of the country’s population.⁵⁹ Apart from the unavailability of all services, it is also a result of the lack of information received by citizens, as well as their distrust towards most institutions. This is especially pronounced at the local level, where the number of available e-services is lower.⁶⁰

The dominant discourse concerning the understanding of online sales is linked to orders made via social media (with the most used social media platform in the country being Facebook), with payment being received in cash upon delivery of the item. This understanding is predominant for the people aged 40+. However, younger generations are more open and willing to adapt to the new tools and ways of e-commerce.

This increasing trend towards online shopping driven by the COVID-19 crisis should help the Macedonian CCIs to strengthen their competitiveness and readiness to be part of the global market, although some support in terms of sensibilizing the customers and capacity building of the CCI in this segment is needed.

4.5.4. Working space

One of the problems faced by many CCI entities and individuals, such as those working in crafts, the independent cultural scene, music, performing arts, photography, etc., is the lack of adequate working spaces. Specifically, all those in these subsectors are spending a good portion of their annual budgets on renting and maintaining spaces. The COVID-19 crisis highlighted this need, as many of the entities were forced to cease renting their facilities due to the financial crisis and were left without a working space. All members of these sectors, according to the available data, pointed to this need and proposed models for public/civil or public/private partnership cooperation. Public cultural institutions have much unused space that could serve the CCI, and which would significantly facilitate both their work and economic situation. The opening up of public institutions to such forms of cooperation would be one of the things with which the MoC could participate in the development of the CCI. The same applies for the municipalities in North Macedonia—they can also provide such spaces without distorting market competition, and based on a fair, transparent, and open procedure.

57 Country Report and Roadmap for Digital Agenda advancement in North Macedonia (2021) Original title: Северна Македонија Опсерваторија за Дигиталната агенда Извештај за тековната состојба и патоказ за унапредување на Дигиталната агенда во Северна Македонија (2021) Metamorphosis Foundation for Internet and Society, Retrieved on 5.09.2021 from <https://metamorphosis.org.mk/wp-content/uploads/2021/07/country-report-and-roadmap-for-digital-agenda-advancement-in-north-macedonia.pdf>

58 “Investigative Article: Citizens wander through the counters, N. Macedonia is 10 years behind Europe in the field of digitalization (I)” – Portalb.mk. Metamorphosis Foundation. Retrieved on 01.04.2022 from: <https://cutt.ly/zntsnyY>

59 Covid-19 speeds up electronic bill payment. Radio Free Europe. Available at: <https://cutt.ly/IntaDrK>

60 Citizens prefer over-the-counter services over electronic services. Radio Free Europe. Available at: <https://cutt.ly/RntsJRe>

4.5.5. Cluster and Creative Hubs

A cluster of CCI and creative hubs in the country is necessary so that the unification of the sector at a higher level can be achieved, giving an opportunity to various partners, as well as introducing various mechanisms that will provide some better support to the sector. There is a need for this kind of platform, one where creative professionals can meet and find collaborative partners or clients, or for clients that are looking for a creative product or service. Such a cluster could be linked to ICT and the digital clusters emerging in the country to foster creative partnerships and innovation.

There is momentum linked to the younger generation that needs to be taken into consideration. Namely, there are few unions of young people from different subsectors that are trying to do something in the CCI sector. Creating hubs that will support these youngsters could be a great force for the overall CCI.

4.5.6. Legislation

The existing legislation requires reconsideration, as many fields are either not regulated or there is a need for the alteration of the current regulation(s). For example, the Law on Culture has not yet been adopted which affects many subsectors from the CCI. For example, the legal framework that covers the craft industry makes it impossible to operate as such while holding another occupation. This was particularly emphasized during the COVID-19 crisis, when workers were mainly staying at home and had the opportunity to work additionally on their craft work. As there is no legal framework for this field, the workers were pushed to sell without any taxation and evidence and thus be a part of the grey economy⁶¹. Another example is the music sector: the existing legislation makes it impossible to establish rules regarding who is a musician and concerning the conditions under which musicians operate. Therefore, currently, cash payment is preferred, which means the subsector also must operate in the grey economy.

4.5.7. Capacity building

There is a clearly articulated need among the overall CCI for capacity building in different disciplines. Support from the public authorities in this respect is also needed. More information about this issue is provided in the section on the Impact of COVID-19 on Skills and Knowledge.

⁶¹ The grey economy, or shadow economy, refers to activity in which statutory obligations are neglected, for example, to avoid paying taxes, or statutory pension insurance, or to receive unjustified refunds. (Finish taxation office. Retrieved on 06.09.2022 from <https://www.vero.fi/en/grey-economy-crime/scope/definition/>)

5. IMPACT OF COVID-19 ON THE CCI IN NORTH MACEDONIA

The safety measures that were taken by the public authorities in North Macedonia for stopping the spread of the COVID-19 virus affected the CCI sector directly. The economic and social impact of the pandemic on the CCI is rather high the in short- and mid-term and most probably in the long- term. However, the situation with the CCI sector in North Macedonia was not very positive even before the COVID-19. The crisis only emphasised or accelerated the trends that existed before the COVID-19 crisis.

The data presented in this part of the report is based on desk research, survey, interviews, and focus groups.

5.1 The CCI most affected by the COVID-19 crisis

As in other countries around the world, in North Macedonia the activities related to live events (theatre, live music, performances, festivals, exhibitions, film productions) were impacted more heavily than those that could be accessed digitally or from a distance, such as games, TV and radio, books, marketing, recorded music, design, etc.

According to the findings of the survey, the CCI subsectors most affected by the COVID-19 crisis have been the performing arts; music; museum and historical sites; film; visual art, crafts, and libraries. The reason for the endangering of these sectors during COVID-19 were the strict measures taken by the state, such as complete closure, quarantine, not being able to use venues, etc. (See Table 14)

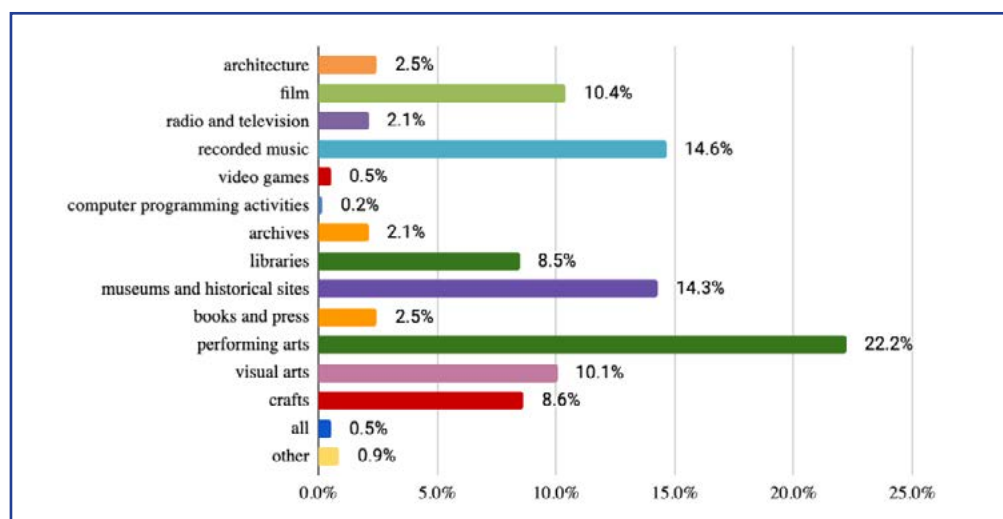


Table 14:

CCI subsectors that have been the most affected by and are most at risk from the COVID-19 crisis

The findings from the survey⁶², reveal that the majority (44.1%) felt that COVID-19 has had a major impact on the professional conditions of cultural and creative workers (CCW); 31.6% feel that it has had medium impact, and 24.22% a low impact (See Table 15).

Most of the respondents feel that CCWs who work part-time or as freelancers in the creative and cultural sector are the most affected by the COVID-19 crisis, for example by losing their jobs or the cancelling of their contracts, and thus many of them are left without basic financial income and are forced to work elsewhere. In addition, the respondents believe that a major proportion of the cultural workers working in precarious conditions have suffered a huge blow, especially in terms of their safety and protection during the COVID-19 crisis. The support that some CCWs received from the government is far from the amount needed to cover basic living costs. Most cultural workers—who have part-time status—operate through project activities; hence, many of them turned to other activities to survive during the COVID-19 crisis.

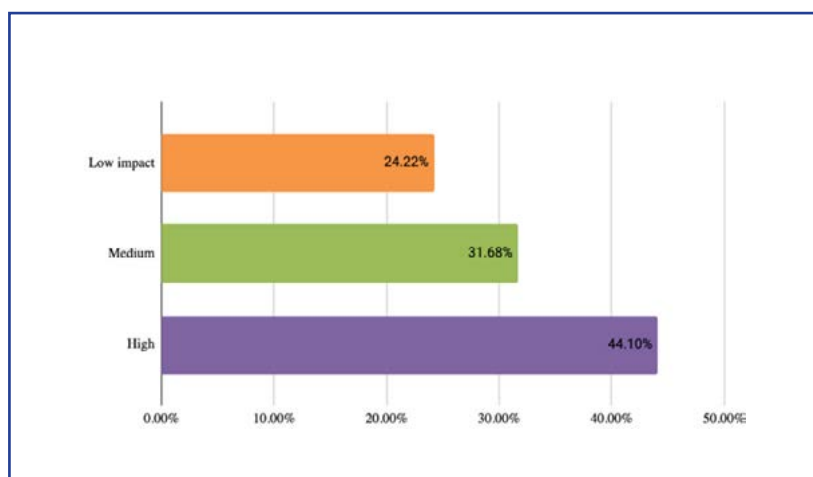


Table 15: The impact of COVID-19 on the professional status of cultural and creative workers

The exception to this delicate, tenuous situation are those CCI workers of the public institutions, which during COVID-19 remained relatively safe, as those workers received a full salary every month. Even more, public sector wages in culture have increased with the new collective agreement during the crisis. In addition, most of the public institutions did not host any activities for a long period of time, not having any obligation to do so during COVID-19. For example, there are cases where theatrical employees received a salary for two years and had no engagement. The activities in these institutions depended on the will of the management structures, and in most cases, the institutions of public interest did not undertake any activities during the crisis.

⁶² One of the research's limitations is related to the sample of the survey. It should be noted that the results of the survey do not give a complete and realistic picture of the situation in the CCI sector in North Macedonia during the COVID-19 crisis. This is primarily due to the sample of respondents where app. one third (38,6%) comes from public institutions, which during the COVID-19 crisis were well protected by MC and could not share the same vision with others who came from the private or CSO sector. This fact leads to a small distortion of the results. However, the interviews and focus groups helped to achieve a more realistic overview of the situation with the CCI sector.

This treatment of public sector employees was unbalanced and unfair in relation to those working in the private or civil sectors. These who are part of the latter did not receive adequate or even any assistance from the state. Thus, there is a great disappointment towards the MoC in terms of its negligence towards the needs of these sectors during the COVID-19 crisis.

It must be noted that some entities from the CCI and from the private and civil society sectors, have displayed greater solidarity and care for those who were most vulnerable during this period. For example, they have provided financial assistance to those who were hired part time or on a contractual basis, giving up their profits. Many of these entities are questioning the reason for paying taxes to the state, as they are not receiving any support and in particular since the governments have failed to provide minimal assistance even in such a crisis.

5.2 Trends in the CCI sector in relation to the COVID-19 crisis

According to the available data from this research, there are several general trends for all CCIs that were present during the COVID-19 crisis. The analysis of the survey, interviews, and focus groups reveal that the general trends of the CCI sector during the COVID-19 crisis have been first related to the limitations in terms of traveling and mobility (due to the COVID-19 restrictions, all travel arrangements were cancelled or postponed) than to the changing of the scope and content of their work (because of unreliable income during COVID-19, many individuals and entities, such as musicians, visual artists, and freelancers were forced to work in a completely new field, such as marketing, PR, graphic design, etc.); changing of the models of operating (almost all entities and individuals have changed their way of operating, using digital tools, working from home, etc.); shifting to digital content and communication (the process of artistic creation, production and consumption has dramatically changed, shifting into the digital sphere where a lack of this kind of skill is detected); emerging online sales (e-commerce is recognized as a possibility for further development of the CCI, but at the same time, the lack of skills and digital literacy is also recognized) and lack of support from the public authorities for all CCIs (all participants in this research have the same feeling regarding a lack of care and support for the CCI before and during the COVID-19 crisis, when even the public sector was well secured).

It should be noted that due to the specificity of the subsectors, as well as due to global trends and developments, there are also specific trends and challenges that each subsector is facing. Based on the results from the survey, in Table 16 some of these trends and challenges that came from different subsectors are displayed, such as increasing/decreasing income (depending on the subsector, for example in the games industry, their income dramatically increased during COVID-19, and in performing arts it declined significantly); irregular/regular employment; digital skills (or lack of), changing consumption patterns; lost jobs; etc.

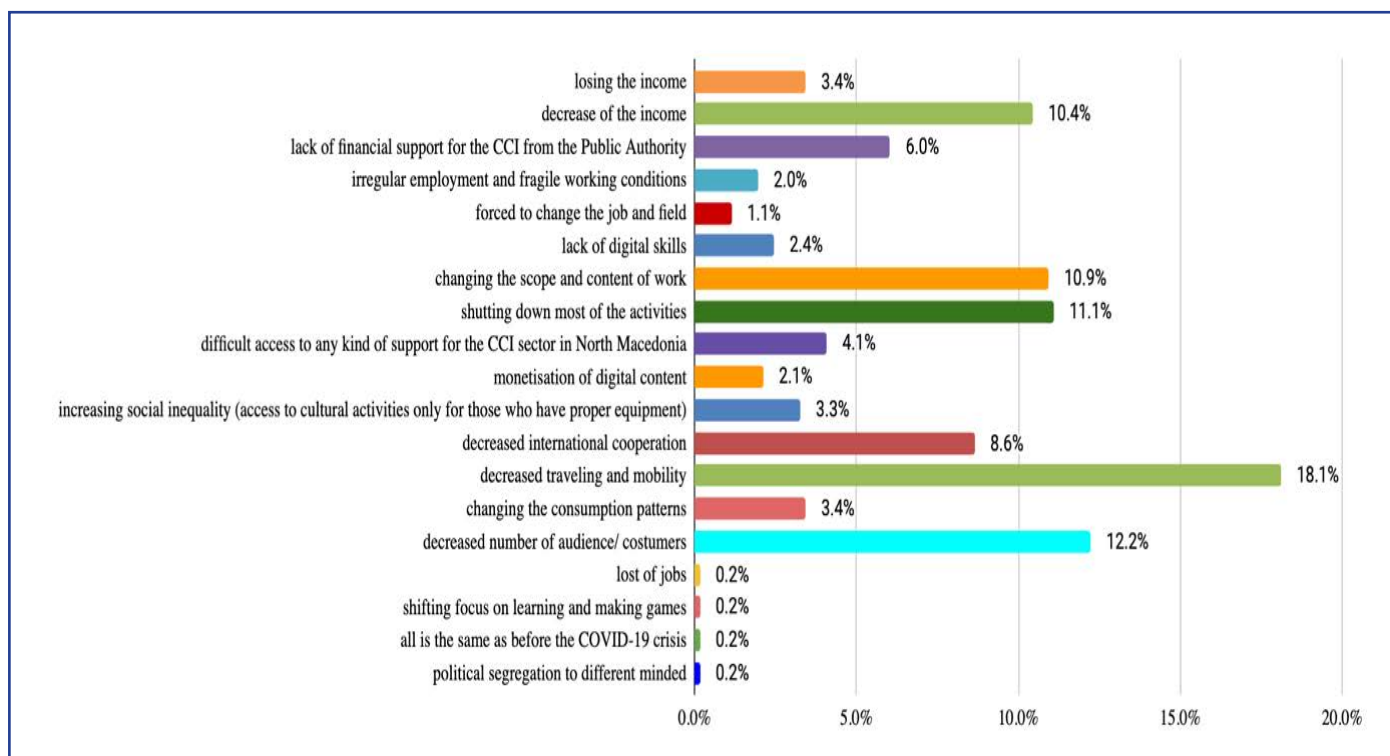


Table 16: Main challenges facing the CCI during the COVID-19 crisis

It should be noted that the results of the survey do not paint a complete picture of the situation in the CCI sector during the crisis, particularly related to income. This is primarily due to the sample of respondents where one third comes from public institutions, which during the COVID-19 crisis were well protected by MK. This fact leads to a minor skew regarding the results, but the interviews and focus groups helped to get a more realistic picture of the situation.

5.3. Impact of COVID-19 on the Strategic and Operational levels of CCIs

COVID-19 has great impact on strategic and operational levels of CCIs and the individuals who work in this sector. The available data from the survey shows that 11.18% of the respondents have completely changed their strategy (vision, mission, and goals), transitioning into another sectors. One of the examples for transitioning into another subsector or industry are a few well-known musicians and performing artists who were forced to sell their instruments in order to survive and instead transition into the graphic design field⁶³. In addition, 56.52% have altered part of their strategic plans. Many of the entities were forced to transition into the digital sphere (online production, online sales, new platforms, new business models, etc.). The last 32.30% remained the same as before the crisis, and this part is

⁶³ Source: Focius Group (Performing Arts), held in April 2022, online

mainly linked to the public institutions (as described before, they were relatively supported, and in most cases, nothing changed during the COVID-19 crisis).

The impact of COVID-19 on the operational level of the entities (individuals) is high according to the available data. It had a strong impact on the models and methods used for the production and distribution of the artistic products, online sales, and on the costs related to the COVID-19 crisis. The COVID-19 restrictions that were proposed all over the world were also applied in the cultural sectors, and many safety measures needed to be taken into consideration. These measures directly influenced the operational costs for some of the CCIs. The findings from the survey shows that 17.39% of the respondents had increased their operational costs by 25% because of these measures; for 9.94% of the respondents, their operational costs increased between 25-50%. However, for some CCIs (36.03% of the respondents), there were no changes in their operational costs, or their costs decreased. (See Table 17)

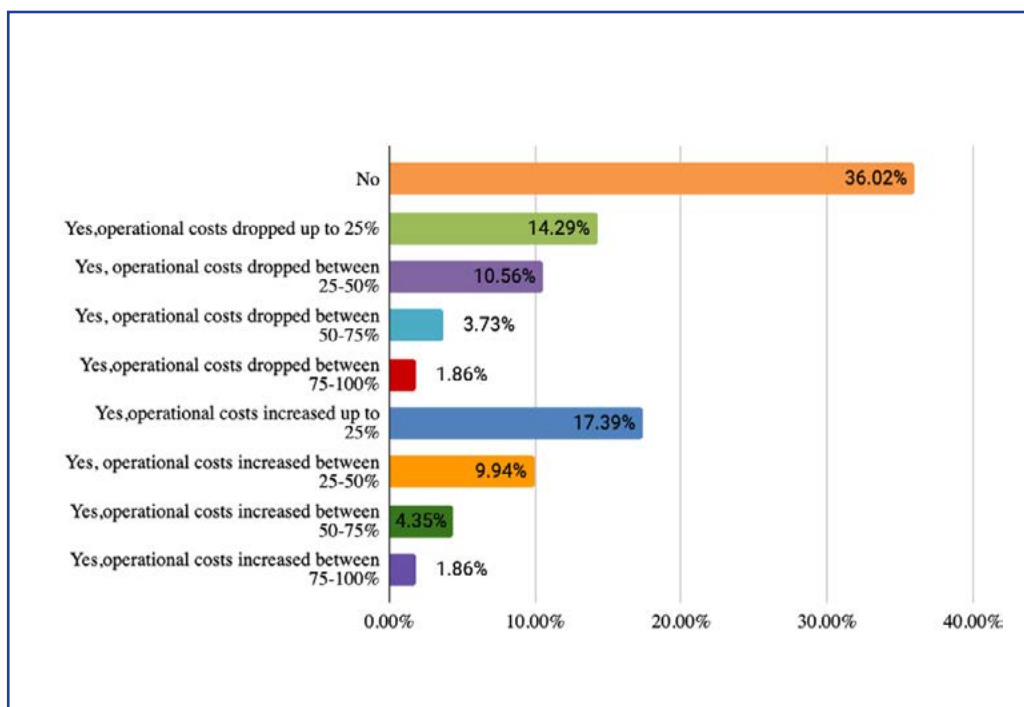


Table 17: Impact of COVID-19 on operational costs ('new corona costs,' safety, etc.)

5.4. Impact of COVID-19 on Audience Engagement

The subsectors related to live events and live contact with audiences faced specific challenges in terms of declining audience sizes. The analysis of the survey related to the impact of COVID-19 on audiences/

customers shows that 24.22% of the respondents saw their audience size/number of customers reduced by between 50-75%; 21.12% of the respondents reduced their audience size/number of customers between 25-50%. Here it is significant that 18.01% of the respondents did not feel any impact in this regard, while app. 8% of the respondents increased their audience size/number of customers during the COVID-19 crisis. (See Table 18)

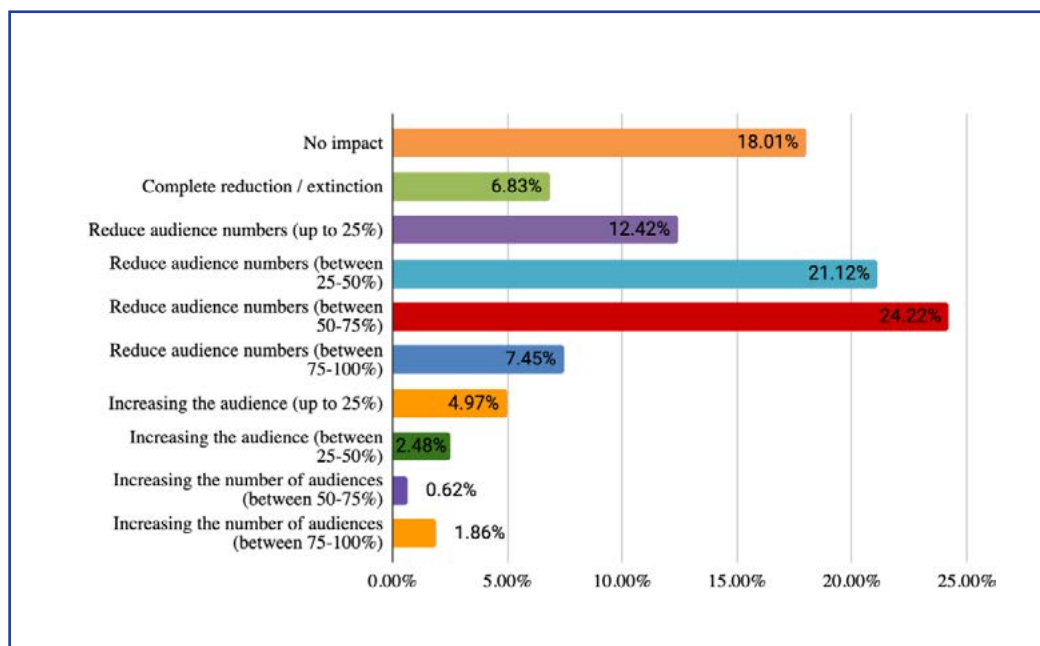


Table 18: The impact of COVID-19 on the size of audience/number of customers

Most of the entities in the CCI subsectors (particularly in performing arts and music) had to halt most of their activities and faced decrease audience sizes which directly influenced their income from ticket sales. In addition, those (very few) who tried to transition to digital content (such as theatrical performances, concerts, or exhibitions), were faced with the challenge of monetizing their activities or the problems with online sales (legal obstacles, low level of digital literacy of the customers, lack of regulation of copyrights and other related rights).

From the other side, subsectors such as gaming tripled their amount of work and income, and likewise saw increased numbers of customers. The challenge that this rapidly growing subsector faced was the need for additional workers in their field, which cannot be found in North Macedonia (due to a lack of skilled people in this field) and certain legal obstacles in terms of clustering of the sector (classification and codification which is linked to taxation regulation).

5.5. Impact of COVID-19 on Skills and Knowledge

The analysis of the educational degree that CCI representatives have obtained shows that the majority of the respondents possess a degree in higher education (a bachelor’s degree (diploma) (40.99%), 36.02% have a master’s degree, and 11.80% have a PhD. (See Table 19)

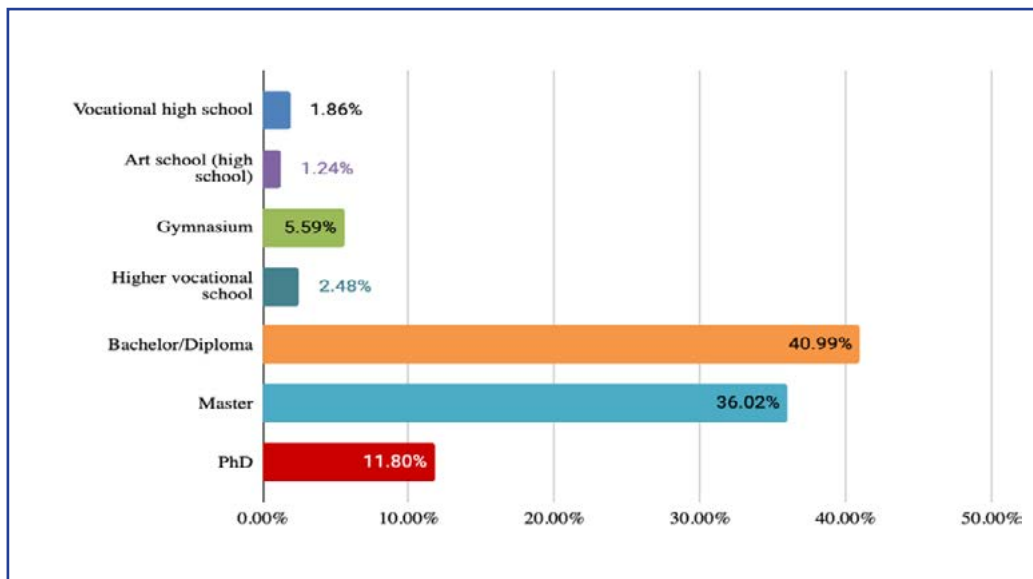


Table 19: Educational degree of the CCI representatives

However, the level of education does not reflect the real situation and the type and quality of the skills, tools, and knowledge that creative workers possess. The existing education system does not meet the needs of the sector and the global challenges that are present. As such, there is a great need for new types of skills, knowledge, and tools that the education system in North Macedonia does not provide. That is the reason why many of the creative workers who are part of the CCI are retraining abroad (with most of them never coming back to the country) or gaining knowledge and skills in non-formal education, which is expensive and cannot be afforded by all entities and individuals from the CCI. No support in this respect is provided by the state.

From the data we received from the survey and interviews, the biggest challenge in terms of adaptation during the COVID-19 crisis is the digital literacy of creative workers, but also of the overall population. Although the percentage of Internet users in North Macedonia is high (the percentage of households with internet access at home in 2020 is 79%⁶⁴), according to the survey and interviews, digital literacy is very low. In addition, there is a significant need for specific knowledge and skills in some subsectors, such as the gaming industry, film production, online sales, strategic management, etc. Many of the entities in these

⁶⁴Source: Statista (2022) Share of households with internet access in North Macedonia from 2008 to 2020, Retrieved on 15.05.2022 from <https://www.statista.com/statistics/702236/household-internet-access-in-north-macedonia/#:~:text=In%202020%2C%2079%20percent%20of-comparison%20to%20the%20previous%20year.>

sectors are investing their own money in providing training for young people in order to prepare them to work in the sector. No support in this respect is provided from the MoC or from the government.

The findings from the survey also reveal that 72% of the respondents have a need to develop new skills to cope with the COVID-19 crisis and the new reality. The majority of respondents have a need to develop their skills at digital literacy (social networking, web-design, digital strategy); digital marketing; online sales; audience development; financial management; collaboration and networking, strategic management, etc. (See Table 20)

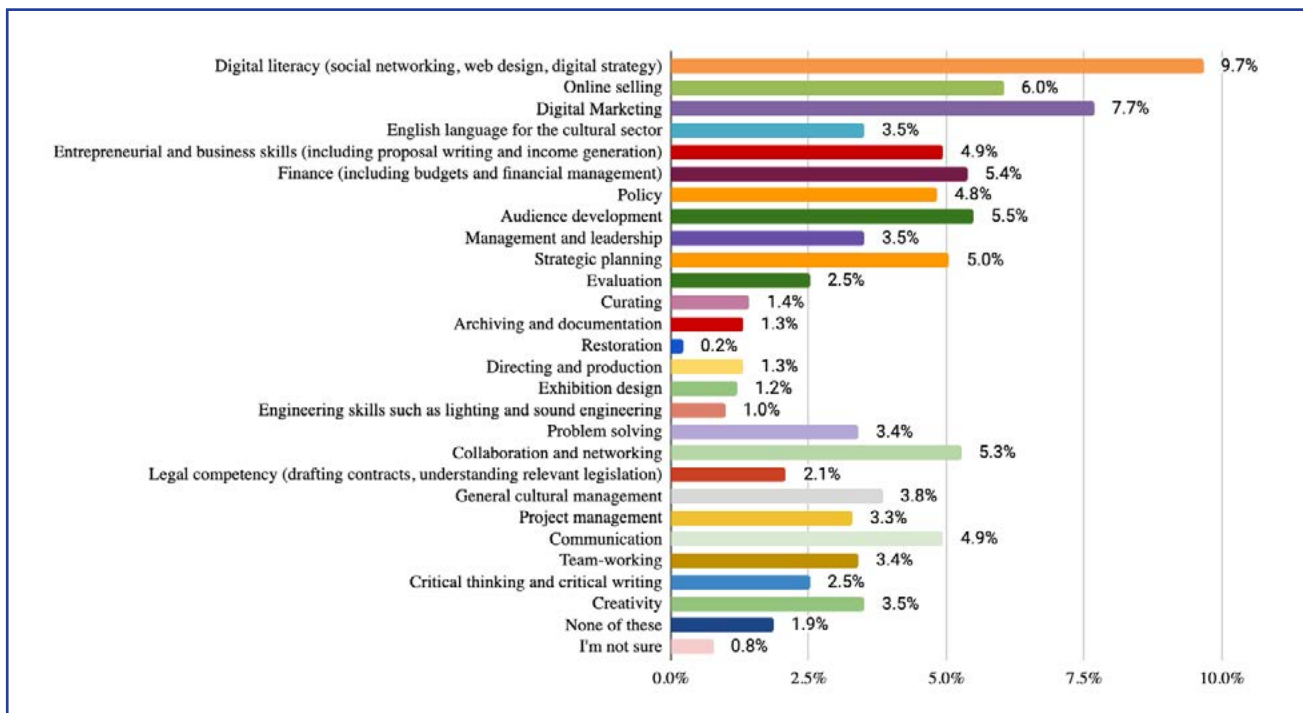


Table 20: Types of skills that the CCI need in order to better cope with the COVID-19 crisis

5.6. Impact of COVID-19 on business opportunities, creativity, and innovation

Being faced with a pandemic such as COVID-19 was and still remains a major challenge for micro, small and medium-sized enterprises in CCI. Many of these entities have survived the effects of the pandemic by proposing new business models and altering their current ones. The effects of the pandemic have further led to significant distortions in labour markets and rendered many prevalent business models ineffective, at least temporarily.

The crisis also brought about new opportunities, among other things the possibility for remote working, which has positively influenced collaboration and networking. Finding partners and collaborative initiatives became faster and easier. The findings from the interviews and focus groups shows that some of the

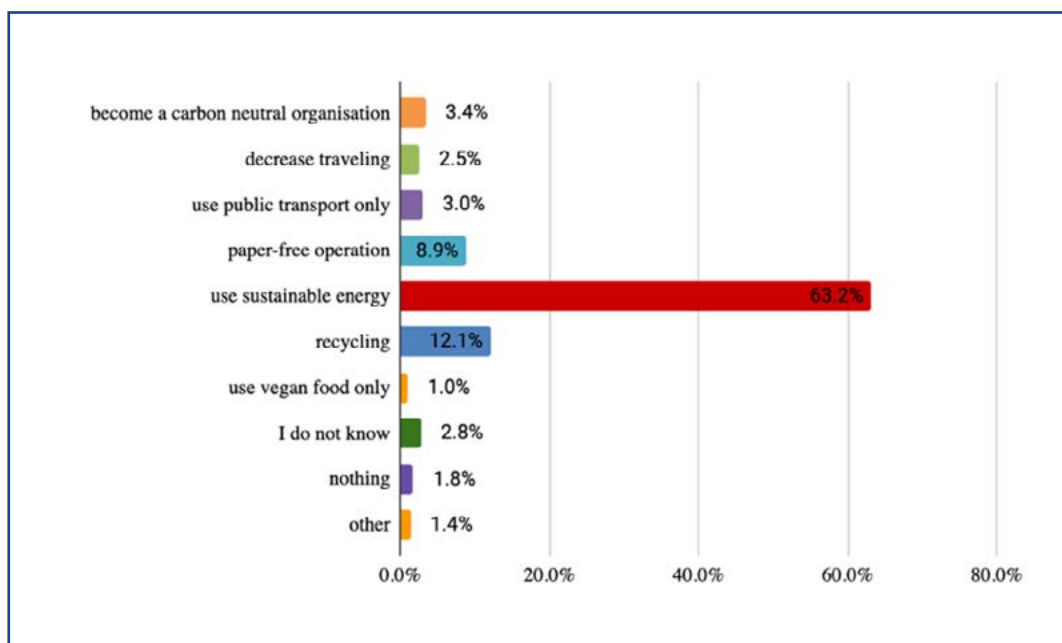
organizations, particularly those from the performing arts, film, and audio-visual fields, have benefitted from these opportunities, starting new collaborative initiatives and strengthening their networking. All these organizations felt that the non-EU countries had easier access to information, partners, and more collaborative opportunities, as well as more cost-effective networking with EU countries.

In reference to the impact of COVID-19 on innovation, according to the available data from the survey, interviews and focus groups, the majority of the CCI representatives feel that COVID-19 has had a positive impact on innovation and artistic creation. The situations that have emerged because of COVID-19 have inspired new opportunities and spaces for innovation and new business models, such as finding new ways for using public spaces; new types of event management; new protocols for production; new technological solutions in live performances; online distribution (VOD), streaming platforms, etc. As for the artistic creation, organizations and individuals who possess digital skills and were more adaptable to the new situation were able to produce and distribute new digital content of their artistic processes. The main challenge in such artistic creation was digital literacy, the ability to adapt their communications with their audiences, and the monetization of their artistic goods. Adapting to the new circumstances, for some of the CCI, was crucial in finding new innovative ways for working, operating, sales, distribution, communication, creation, etc. The crisis has forced people out of their comfort zone, along with disrupting the inertia that many people feel in their professional life, with the shock of the crisis and the time after leading to retrospection, evaluation, and finding a new way forward amidst this new normal.

5.7. Impact of COVID-19 on Sustainability

According to the available data, the occurrence of COVID-19 has changed the professional set up of CCI dramatically, and has altered organizational working habits and behavior. Despite this, we have witnessed a steady increase in concerns related to the sustainability of organizations around the world in the last decade. These concerns are also expressed in certain entities and individuals of the CCI in North Macedonia. Most of the CSOs and private entities, including the public institutions, became environmentally-friendly, implementing certain measures in their everyday operations, such as recycling, the responsible use of energy and water, paper-free operations, etc.

According to the survey, 57.76% of the respondents are not familiar with the European Green Deal, with only 42.24% having familiarised themselves with this concept. Furthermore, regarding the question related to sustainability and ecology and the future orientation of the CCIs towards these topics, 63.2% of the respondents are planning to use sustainable energy, 12.1% are planning to recycle; 8.9% plan to have paper-free operations; 3.4% would like to become carbon neutral; 3% use only public transport, and 4.6% have done nothing or do not know what they would do. (See Table 21)



*Table 21: CCI organisations and their future orientation in relation to ecology and sustainability
(What are the organisations or individuals planning to do in their everyday operations)*

Further sensibilisation (education) and regulation of the cultural field in terms of sustainability is needed.

5.8. Impact of COVID-19 on Digitalization

The COVID-19 has had a major impact on the CCI in terms of altering habits regarding the consumption and production of digital cultural content, mainly because of the impossibility of coming together and using physical spaces during the crises. These shifts took place in a very short period of time, and the overall processes of change and adaptation toward digitalization introduced many challenges but also new opportunities for all involved in the CCI.

The data available from the survey shows that the forms of digital transformation that took place in the CCI sector due to the COVID-19 crisis have mainly been linked to using new communication tools, new models for operating and audience engagements, the digitalization of artistic processes, and new models for participation and distribution, as well as online sales, and new business models. (See Table 22)

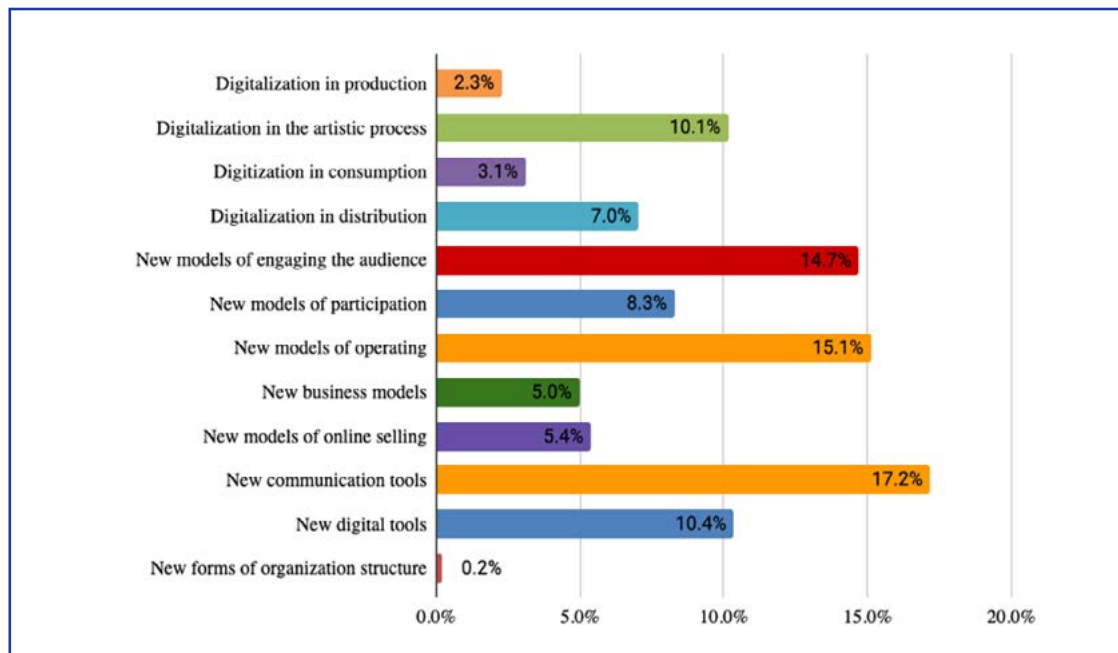


Table 22: Forms of digital transformation during COVID-19 (CCI sector)

The process of adaptation, which is comprised of changes in creation, production and communication with audiences or customers digitally, has been an easier battle for some CCI subsectors than others. One example is TV production, which as one of the CCI subsectors, has witnessed positive trends before COVID with the pandemic accelerating these changes in terms of digitalization, in the form of creating a new streaming platform. One of the best examples from North Macedonia is the creation of glej.mk, the first streaming platform. However, the biggest challenge in this subsector is online sales (subscriptions) and the low level of digital literacy of the general population (not trusting in e-commerce or lacking digital skills). The other big challenge is copyright enforcement. Namely, in this sector, during the COVID-19 crisis the number of pirate IP TV stations that operate and sell their services in North Macedonia illegally grew rapidly. They all directly negatively influence this subsector, and none of the public authorities in Macedonia are taking certain clear steps in terms of regulating this issue.

Another good example is the gaming industry, which has experienced tremendous growth in North Macedonia. It was one of the most well-established digital cultural media even before COVID-19, but the pandemic strengthened the ongoing forces of change. Take for instance Furious Avocado, an indie gaming studio, considered one of the top 20 entities in the world regarding their gaming genre, with the studio counting more than 12 million followers. However, this sector is facing a lack of competent human resources trained in the gaming field and due to a lack of talent, meaning there are limits in terms of developmental projections. In addition, the gaming industry is not recognized by the government as having potential. Therefore, no serious programme or strategy exists at the national level nor is there knowledge of what the gaming industry means globally. The government and the people lack reference points concerning how to value the economic income produced by the gaming industry.

Unfortunately, the other CCI sub sectors did not have such a positive experience with digital adaptation for a variety of reasons. Cinemas, museums, theatres, live musical events, visual arts, crafts, and festivals, all of which were naturally linked to venues and physical spaces for their operations, have delved into the provision of digital content as an urgent ‘need’ during the pandemic in order to maintain connections with their existing audiences and collaborators. However, the majority of them are keen to return to having physical experiences at venues and sites as soon as the restrictions were lifted. In other words, at the time of writing (May 2022) when COVID-19 appears to be under control, it is hard to predict how much of the digital innovation that we have witnessed from entities and individuals in the CCIs outside of the audio-visual and game industries will continue in that direction in the longer term.

5.9. Impact of COVID-19 on the CCI: Economic outlook

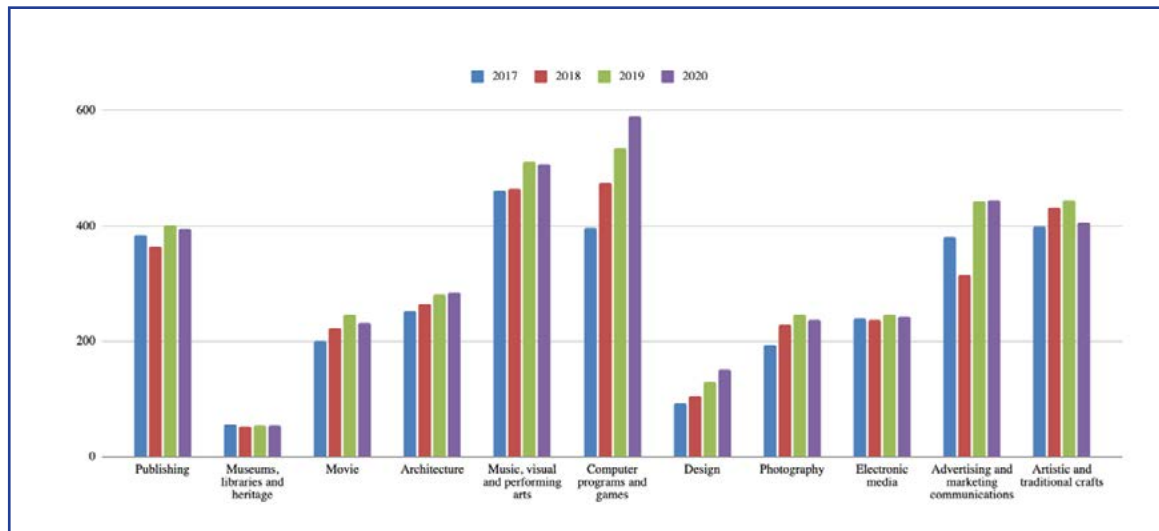
5.9.1. Number of entities in the CCI sector before and during the COVID-19 crisis

All of the data provided in this part of the report are based on the calculations provided by the State Statistical Office of North Macedonia. It is important to note that the figures provided in this section are not given in absolute numbers, as the State Statistical Office counts the entities per sector/subsector only if more than three entities are active. In addition, only active entities, meaning those that have their annual balance sheet accounted for in the Central Register Office, are taken into consideration.

The CCI sector from 2017-2020⁶⁵ witnessed a growing trend, from 3052 entities in 2017, to 3161 entities in 2018, 3535 in 2019 and 3540 entities in 2020. (See Table 23 and Annex III) The growth rate in 2020 was the lowest compared to 2017, 2018 and 2019, and this phenomenon could be linked to the COVID-19 crisis. The highest level growth in terms of increasing the number of entities from 2017-2020 was contained within the computer programming and gaming sub-sector, which went from 396 entities in 2017, to 473 in 2018, 533 in 2019 and 588 in 2020. For this sub-sector, the COVID-19 crisis has had a positive impact by increasing the number of entities by 10.3%. The music, visual arts, and performing arts subsector is one of the largest, with minor growth in the 2017-2019 period (460 in 2017, 465 in 2018, 510 in 2019) and a small decrease in 2020 to 506 entities (four entities ceased operations). This also could be linked to the COVID-19 crisis. The most significant progress in the number of entities can be seen in the design sub-sector, with 93 entities in 2017, 106 in 2018, 130 in 2019, and 152 in 2020.

The available data demonstrates that COVID-19 had a positive impact on the computer and games subsector, as well as design, advertising, and marketing communication. Negative trends with decreasing numbers of entities can be seen in the film industry, as well as publishing, photography, and most strongly in artistic and traditional craft.

⁶⁵ Source: State Statistics Office of North Macedonia, Data provided based on Request for additional information (March 2022)



Regarding the size of the entities, in 2017, the larger number of entities were small organizations, with a total of 946 (with 0-9 employees), 402 entities were medium size (10-49 employees), and there were only four large entities with employees between 50-249 in number (see Annex III). In 2020, the number of entities in the CCI sector, compared to the number in 2017, grew by 16.17% for the small entities (total of 1099 small entities), 29.35% for the medium size (total of 520 medium size), and the number of large entities almost tripled (11 in total).

The computer programmes and games and electronic media are the sectors with the most entities in 2020.

As for the geographic scope of the CCI sector, the data reveals that the Skopje region hosts the largest number of entities with 977 in 2017 (72% of the total number of entities of the CCI sector) and 1187 in 2020 (72.82% of the total entities of the CCI sector). Compared to the population of the region of Skopje which is approximately 2,068,808 or 30.7% of the total population (estimated on 31.12.2020) in North Macedonia⁶⁶, the number of entities located in the Skopje region is much larger now (72.82% in 2020) than in all other areas in North Macedonia, which accounts for 27.18% of the number of entities. This figure displays the trend towards the metropolization of the CCI sector in North Macedonia. (See Annex III)

In relation to the organisational forms, Trade company - Limited Liability Companies founded by One Person were the largest group with 766 entities in 2017 and 1063 in 2020. The number of Trade companies -

⁶⁶ Source: State Statistical Office of the Republic of North Macedonia (NA) Naselenie na 31.12, pol, vozrast, statistichki regioni, godini (Population on 31.12, gender, age, statistical region, years). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_Naselenie_ProcenkiNaselenie/225_Popis_reg_3112_PolVoz_mk.px/?rxid=cace8311-ffb9-4115-ac7b-8893c526b50a State Statistical Office of the Republic of North Macedonia (2021) Naselenie na 31.12, pol, vozrast, statistichki regioni, godini (Population on 31.12, gender, age, statistical region, years). Available at: http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_Naselenie_ProcenkiNaselenie/225_Popis_reg_3112_PolVoz_mk.px/?rxid=cace8311-ffb9-4115-ac7b-8893c526b50a State Statistical Office of the Republic of North Macedonia (2021) Naselenie na 31.12, pol, vozrast, statistichki regioni, godini (Population on 31.12, gender, age, statistical region, years). Available at: http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_Naselenie_ProcenkiNaselenie/225_Popis_reg_3112_PolVoz_mk.px/?rxid=cace8311-ffb9-4115-ac7b-8893c526b50a State Statistical Office of the Republic of North Macedonia (2021) Naselenie na 31.12, pol, vozrast, statistichki regioni, godini (Population on 31.12, gender, age, statistical region, years). Available at: http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_Naselenie_ProcenkiNaselenie/225_Popis_reg_3112_PolVoz_mk.px/?rxid=cace8311-ffb9-4115-ac7b-8893c526b50a

Limited Liability Companies in 2017 with 379 entities decreased to 306 entities in 2020. The lowest number of entities belongs to the CSOs, with 57 in 2017 and 58 in 2020.

The available data on the number of CCI entities (up to 2020) did not demonstrate that COVID-19 had a significant impact. However, it should be taken into consideration that the data is available for only up to 2020, when the COVID-19 crisis started. The data reveals a growing trend in the number of entities in 2020.

5.9.2. Employment

Trends in employment are usually linked to what happens to salaries and turnover.

The data available on employment comes from two different sources: Eurostat and Makstat. Both sources provide data on the employment of CCIs in North Macedonia, albeit the figures are different. For example, Eurostat provides the total number of cultural employees as 26,900 for 2020, whereas Makstat gives 44,286 for 2020⁶⁷. This is mainly because both follow different classification systems, have different codes, and different numbers of subsectors per level. However, both sources display similar trends in regard to the total number of employees in the CCI sector for the 2017-2019 period. For 2020, the information from both sources is different—according to Eurostat, the number of cultural employees increased while according to Makstat this number slightly decreased.

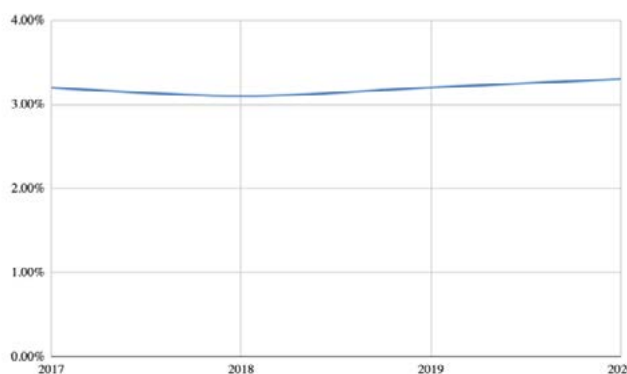


Table 24: Cultural employment in North Macedonia (Percentage of the total employment in the country for the 2017-2020 period)⁶⁸

According to Eurostat in 2017, the total number of cultural employees in the CCI sector was 23 900; 23 200 in 2018; 25 400 in 2019 and 26 900 in 2020. The distribution of the cultural employees between the genders was balanced in 2017 and 2018. In 2020, males were represented with 54.3% and females with 45.8%. (See Table 25)

⁶⁷ Makstat Database also counts the subsectors: education and retail trade except motor vehicles and motorcycles, which significantly enlarge the number of cultural employment.

⁶⁸ Source: Source: Eurostat (2021) Cultural employment by sex (online data code: CULT_EMP_SEX). Retrieved on 06.03.2022 from https://ec.europa.eu/eurostat/databrowser/view/CULT_EMP_SEX/default/table?lang=en&category=cult.cult_emp

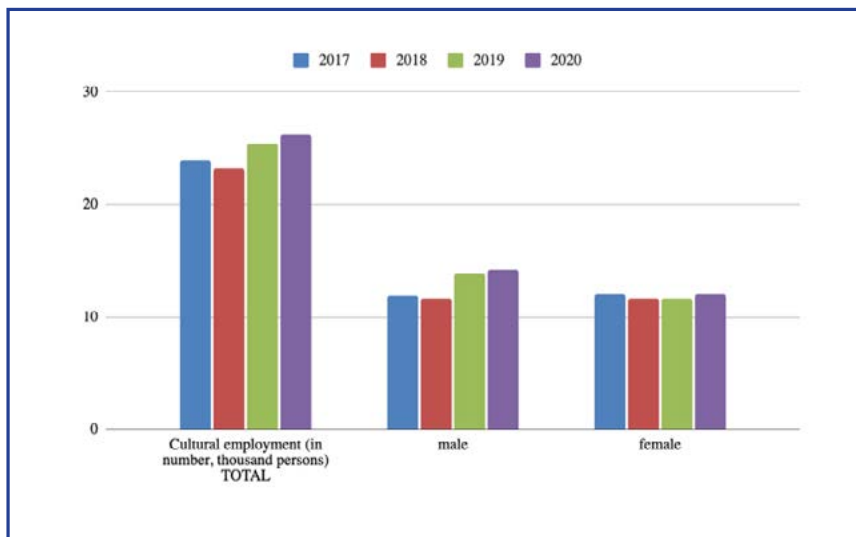


Table 25: Cultural employment in North Macedonia (2017-2020)⁶⁹

According to the Makstat Database⁷⁰, in 2017, the total number of cultural employees was 37,041. In 2018, this number grew by 9.4% (total number 40,532). In 2019, cultural employment grew by 9.79% (total number 44,502). In 2020, the number of cultural employees decreased by 0.48% (total number 44,286), which could be linked to the COVID-19 crisis. (See Table 26)

The employment in film, video and television production, sound recording and music publishing activities and broadcasting displayed negative trends, including decreases in the number of employees even before the COVID-19 crisis, from 2017 onwards. From the other side, computer programming, consulting and related activities, information service activities, management activities, management advice and creative, artistic and entertainment activities displayed positive trends with increasing numbers of employees.

69 Source: Source: Eurostat (2021) Cultural employment by sex (online data code: CULT_EMP_SEX). Retrieved on 06.03.2022 from https://ec.europa.eu/eurostat/databrowser/view/CULT_EMP_SEX/default/table?lang=en&category=cult.cult_emp

70 Source: State Statistical Office of the Republic of North Macedonia (N.A.) Employed based on sectors and activities in regards with the National Classification of Activities Rev 2., gender and years. Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/px-web/mk/MakStat/MakStat_PazarNaTrud_Plati_VraboteniNeto/201_PazTrud_Mk_vraboteniG1_mk.px/table/tableViewLayout2/?rx-id=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

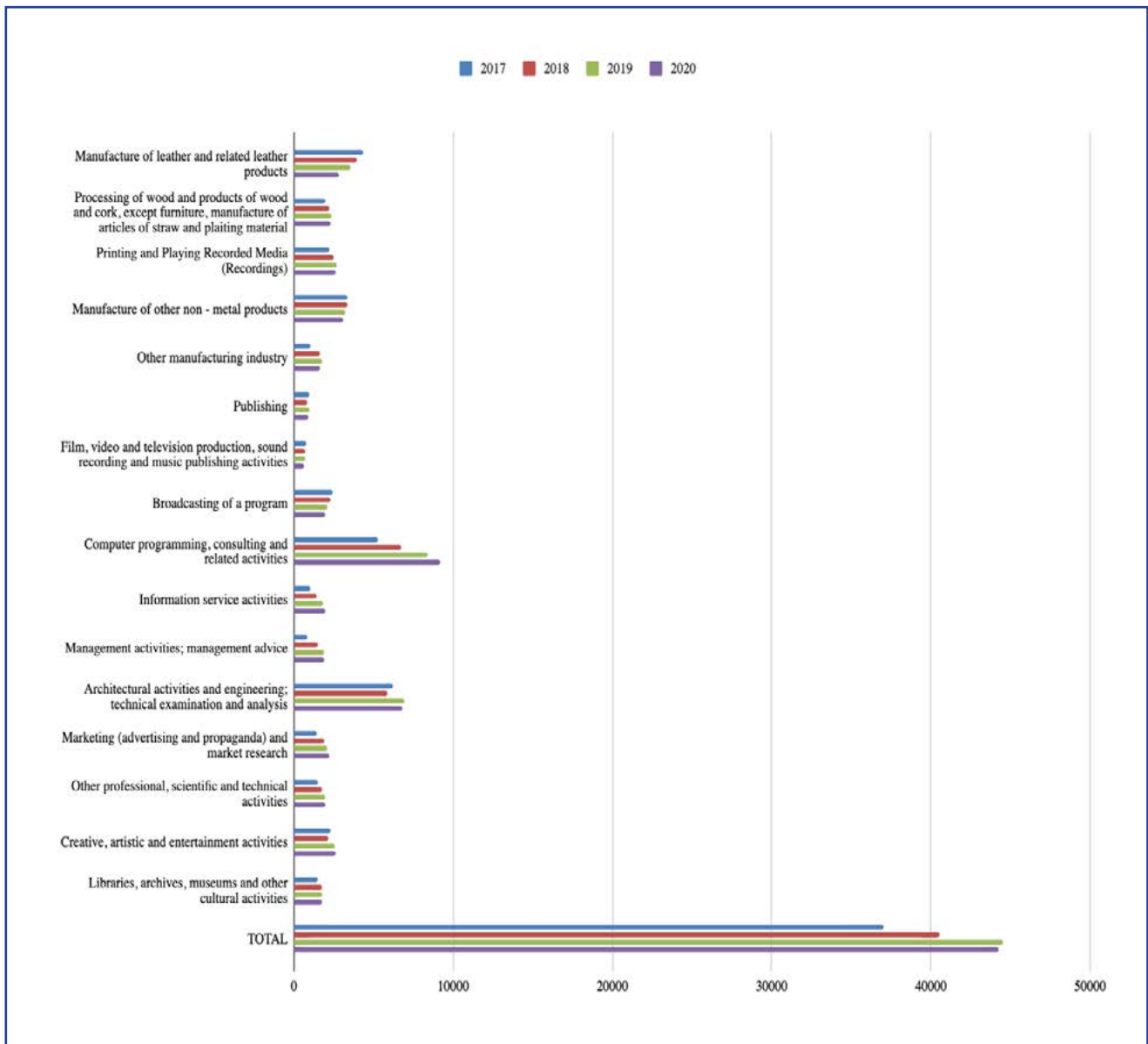


Table 26: Number of cultural employees per sector (2017-2020)

As for the cultural employment by type of engagement (See Table 27), the number of employees with permanent jobs slightly decreased from 2017-2018/19, from 92% to 85%, and in 2020 there was an increased number by up to 87%. The number of self-employed persons is decreased from 11% in 2019 to 10% in 2020, after the COVID-19 crisis started.⁷¹

⁷¹ Eurostat (2021) Persons working as creative and performing artists, authors, journalists and linguists (online data code: CULT_EMP_ART). Retrieved on 06.03.2022 from https://ec.europa.eu/eurostat/databrowser/view/CULT_EMP_ART/default/table?lang=en&category=cult.cult_emp

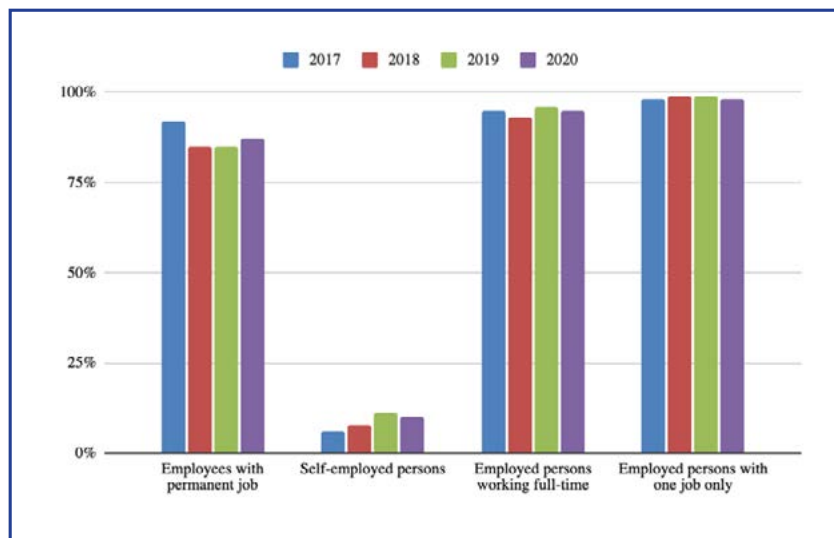


Table 27: Cultural employment by type of engagement (in percentage)

The number of self-employed persons working as creative and performing artists, authors, journalists, and linguists ranged from 13% of the total cultural employment in 2018, to 22% in 2019, and 15% in 2020.

The data displays a decreasing trend in the rate of self-employment in these subsectors in 2020 by 7% compared to the previous year. This can be linked to the COVID-19 crisis.

5.9.3 Wages

The average monthly net wage in North Macedonia for all sectors in euro⁷² has witnessed a growing trend in the period from 2017 to 2020, from 369 EUR in 2017 to 435 EUR in 2020.

As for the CCI sector (See Annex IV), many of its subsectors have below average monthly net wages for all sectors, such as printing and the reproduction of recorded media (from 297 EUR in 2017 to 390 EUR in 2020), publishing activities (428 EUR in 2020); creative, arts and entertainment activities (from 365 EUR in 2017 to 432 EUR in 2020), etc. The computer programming, consultancy and related activities, and advertising and market research, are those subsectors which have a monthly net wage above the average rate in North Macedonia.

What is significant here, (See Annex IV), is the decreasing trend in the monthly net wages for some of the subsectors from the beginning of 2020 up to June 2020. This can be connected to the COVID-19 crisis. For example, for the subsector for motion picture, video and TV programme production, sound recording and music publishing activities, which had a monthly net wage of 540 EUR in January 2020, saw their wages

⁷² National Bank of North Macedonia (2022) Middle rate in MKD on 03.02.2022 1 Euro= 61,695 MKD. Retrieved on 03.02.2022 from https://www.nbrm.mk/kursna_lista.nsp

decline on average to 310 EUR in June 2020⁷³, which is below even the average monthly net wage in North Macedonia for all sectors. Most of the other subsectors displayed in Annex IV have seen their monthly net wages decrease in 2020, but not as significantly as in the previously mentioned subsector. For example, printing and reproduction of recorded media in January 2020 had an average of 397 EUR and in June, 390 EUR; computer programming, consultancy and related activities had average wages of 1094 euro in January and 1064 in June 2020, etc. Only a few sectors saw their monthly net wages increase significantly, such as the creative, arts and entertainment activities, from 428 EUR in January 2020 to 432 euro in June 2020; and architectural and engineering activities, technical testing and analysis from 431 EUR in January 2020 to 448 EUR in June 2020⁷⁴.

Similar data was collected from the survey. As for the impact of COVID-19 on organisations or individual income and revenues, the findings from the survey show that 33.54% of the respondents did not experience changes in their income or revenues (mostly coming from the public institutions); 19.88% experienced a decrease in income and revenues between 25-50%; 16.77% of the respondents experienced a decrease of up to 25%; 12.42% of the respondents experienced a decrease of between 50-75%; 4.35% experienced a decrease of between 75-100%; and only app. 4% experienced an increase in their income and revenue. (See Table 28)

Again, this is not in absolute numbers nor does it provide a complete, realistic overview of the situation, due to the research limitations of this survey as explained previously. However, it provides an overview of the general trends that the COVID-19 crisis has caused.

73 Source: State Statistical Office of The Republic of North Macedonia (2017) Average monthly net wage paid per employee, January 2017. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2017/4.1.17.24.pdf>
 State Statistical Office of The Republic of North Macedonia (2017) Average monthly net wage paid per employee, June 2017. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2017/4.1.17.65.pdf>
 State Statistical Office of The Republic of North Macedonia (2018) Average monthly net wage paid per employee, January 2018. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2018/4.1.18.24.pdf>
 State Statistical Office of The Republic of North Macedonia (2018) Average monthly net wage paid per employee, June 2018. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2018/4.1.18.73.pdf>
 State Statistical Office of The Republic of North Macedonia (2019) Average monthly net wage paid per employee, January 2019. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2019/4.1.19.27.pdf>
 State Statistical Office of The Republic of North Macedonia (2019) Average monthly net wage paid per employee, June 2019. Retrieved on 06.03.2022 from https://www.stat.gov.mk/pdf/2019/4.1.19.75_mk.pdf
 State Statistical Office of The Republic of North Macedonia (2020) Average monthly net wage paid per employee, January 2020. Retrieved on 06.03.2022 from https://www.stat.gov.mk/pdf/2020/4.1.20.27_mk.pdf
 State Statistical Office of The Republic of North Macedonia (2020) Average monthly net wage paid per employee, June 2020. Retrieved on 06.03.2022 from https://www.stat.gov.mk/pdf/2020/4.1.20.75_mk.pdf

74 See the source in 69

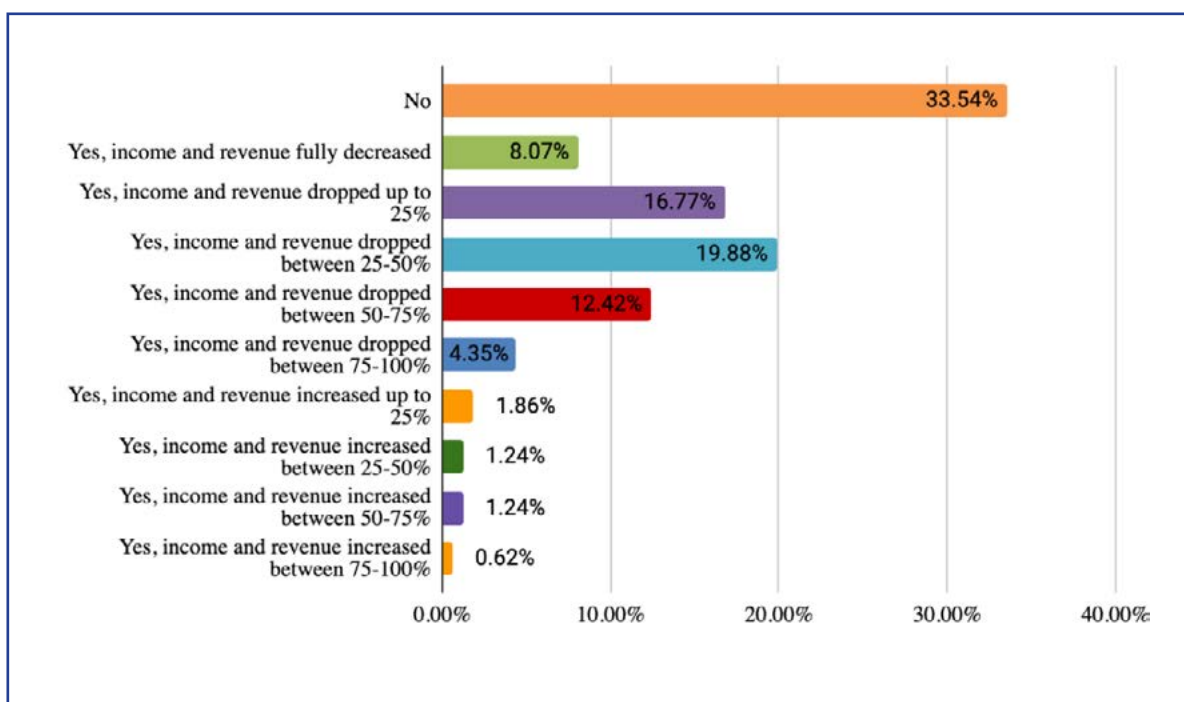


Table 28: The impact of COVID-19 on organisations' or individual income and revenues

5.9.4. GDP, Turnover, Added value

The available data for GDP contribution of CCI sectors is incomplete, as data is missing on the GDP and GVA contribution of CCI to the overall (country) GDP of 4-digit classes of the NACE Rev.2 which were selected to collect data on cultural economic activities. Data is available on 2-digit NACE codes, thus allowing for the calculation of data at a more aggregated level. However, such data is missing the relevant details necessary for producing relevant cultural data.

Table 29 presents the gross added value of the selected sectors and departments which are subject to this analysis for the period from 2017 to 2020⁷⁵. Keeping in mind that the definition of CCI activities also includes activities from the manufacturing sector for which GDP information was not available at the class 4 level, this sector was thus excluded from the review.

⁷⁵ Source: State Statistical Office based on request for additional statistical data and calculations conducted by the team (March 2022)

GDP of selected CCI sectors (in million denars)	2017	2018	2019	2020
J - Information and communication	11342	12779	14450	15697
M - Professional, scientific and technical activities	7115	7903	9136	8771
R - Arts, fun and recreational activities	4705	4887	5466	5214
Total	23162	25569	29052	29682
Participation of the subsector in the GDP creation of CCI (sectors J, M and R) (%)				
GDP at current prices (in million denars)	3.75%	3.87%	4.19%	4.53%
J - Information and communication	48.97%	49.98%	49.74%	52.88%
M - Professional, scientific and technical activities	30.72%	30.91%	31.45%	29.55%
R - Arts, fun and recreational activities	20.31%	19.11%	18.81%	17.57%
GDP of selected CCI sectors (in million euro)				
J - Information and communication	183.8	207.1	234.2	254.4
M - Professional, scientific and technical activities	115.3	128.1	148.1	142.2
R - Arts, fun and recreational activities	76.3	79.2	88.6	84.5
Total	375.4	414.4	470.9	481.1

Table 29: The gross added value of the CCI sub sectors in the period from 2017 to 2020

In addition, Table 29 adds the total Gross Domestic Product for each respective year, calculated by the State Statistical Office according to the production method (at current prices). It is important to keep in mind that this GDP is not calculated by the method of constant prices, as it includes the impact of inflation from year to year.

The share of the selected sectors in the CCI industry in the total GDP shows a growth trend, from 3.75% in 2017 to 4.53% in 2020. The largest share of all sectors has been demonstrated to be sector J - Information and communication (48.97% in 2017 and 52.88% in 2020), followed by sector M - Professional, scientific, and technical activities (30.72% in 2017 and 29.55% in 2020) and sector R - Arts, fun and recreational activities (20.31% in 2017 and 17.57% in 2020). There are 90 activities in the R - Arts, fun and recreational activities sector, with 91 creative, arts and entertainment activities. Concerning libraries, archives, museums, and other cultural activities which remained largely closed in 2020, a decline is observed in their contribution to GDP in contrast to the relatively stable contribution of sector M - Professional, scientific and technical activities, and there is even growth in sector J - Information and communication.

Observed through the structure of the sectoral individual activities and their contribution to the total GDP and growth of their share of GVA in GDP (Table 30)⁷⁶, it is noticeable that the growth in the sector J - Information and communication from 1.82% in 2017 to 2.39% in 2020 is based on the growth in the activities of 62. Computer programming, consultancy, and related activities, from 1.12% in 2017 to 1.75% in 2020. Activities in 58. Publishing, 60. Programming and broadcasting activities show a slight decline, in contrast to 59. Motion picture, video and TV programme production, sound recording and music publishing activities where there is a dramatic decline from 0.19% in 2017 to 0.05% in 2020.

⁷⁶ Source: State Statistical Office based on Request for additional statistical data and calculations conducted by the team (March 2022)

GDP of selected CCI sector	current prices (in million denars)				Participation of GVA in GDP (in %)			
	2017	2018	2019	2020 ¹⁾	2017	2018	2019	2020 ¹⁾
J - Information and communication	11342	12779	14450	15697	1.83	1.93	2.09	2.39
58. Publishing	885	850	729	718	0.14	0.13	0.11	0.11
59. Motion picture, video and TV programme production, sound recording and music publishing activities	1157	835	801	352	0.19	0.13	0.12	0.05
60. Programming and broadcasting activities	1117	1074	1102	931	0.18	0.16	0.16	0.14
62. Computer programming, consultancy and related activities	6931	8323	9855	11502	1.12	1.26	1.42	1.75
63. Information service activities	1252	1697	1963	2194	0.20	0.26	0.28	0.33
M - Professional, scientific and technical activities	7115	7903	9136	8771	1.15	1.20	1.32	1.34
70. Governing activities; Consultancy related to governing	1075	1089	1303	1297	0.17	0.16	0.19	0.20
71. Architecture and engineering; technical research and analysis	3733	4288	5011	4891	0.60	0.65	0.72	0.75
73. Marketing and market research	1170	1398	1617	1368	0.19	0.21	0.23	0.21
74. Other professional, scientific and technical activities	1137	1128	1205	1215	0.18	0.17	0.17	0.19
R - Arts, fun and recreational activities	4705	4887	5466	5214	0.76	0.74	0.79	0.79
90. Creative, arts and entertainment activities	3411	3483	3904	3826	0.55	0.53	0.56	0.58
91. Libraries, archives, museums and other cultural activities	1294	1404	1562	1388	0.21	0.21	0.23	0.21
GDP (market prices)	618106	660878	692683	655931	100.00	100.00	100.00	100.00

Table 30: The structure of individual activities in the CCI subsectors and their contribution to the total GDP, the growth of the share of GVA in GDP (2017-2020)

5.9.5. Turnover by sector

The data for Turnover by CCI sector was available for 2017-2019 only; therefore the comments on the impact of COVID-19 are not presented. The sections for Publishing and Film did not display a stable growth trend in the three analysed years (2017-2019)⁷⁷. After 2017, in 2018, in the publishing activities sector, there was a 75% decline in turnover, and in the Film section the decline was the highest by as much as 92.14%. When comparing 2018 and 2017, only the sections for Computer programmes and games increased by 28.16%, and the section for Advertising, communications and marketing decreased by 10.94%. The sections for Photography and Electronic Media also registered a slight increase.

The comparison between 2019 and 2018 is completely the opposite. The Film section recorded an increase by 1,073.33% and Publishing activities by 266.79%. The other sections also recorded growth albeit that which is still lower, except for Design with a growth of 100%, Artistic and traditional crafts with a growth of 68.47%, and Music, visual and performing arts with a growth of 66.67%. Only the Electronic Media section dropped by 17.45%. The analysed period and the inconsistency regarding the growth and decline of the turnover do not have the potential for offering real conclusions related to the turnover in the sections for the 2017-2019 period. The fall in 2018 is as worry as the growth in 2019 was liberating. However, although in the analysed period the turnover was unstable regarding the growth and decline, in 2019 we still recorded a total growth of 26.73% compared to 2018, unlike the growth of 2018 compared to 2017 which was a symbolic 0.21%.

⁷⁷ Source: State Statistical Office based on request for additional statistical data and calculations conducted by the team (March 2022)

5.9.6. Market and trade

In reference to the impact of COVID-19 on the market in which the CCI operates, the findings from the survey reveal that majority of the respondents feel that the crisis has had a high impact on the market. (See Table 31). The respondents commented on different aspects that influence the market, such as: the changing consumption patterns of customers (more savings, less spending); the increased prices of materials and decreased profits in some subsectors; the reality that many people are now focused on their survival and less attention is being paid to new concepts and models on how to position themselves in new markets; for some of them, digitalization brought new opportunities for networking and new collaborations with less investments; the distribution of video games increased and the market was enlarged; film workers and producers are now focused more on online distribution and Video on Demand (VOD)⁷⁸ as one of the solutions; and the market for the production of commercial videos has shrunk; etc.

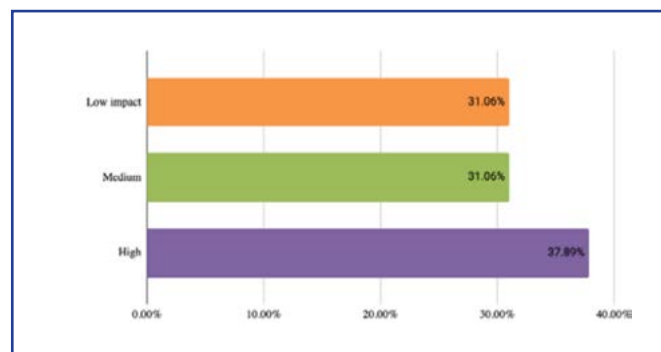


Table 31: The impact of COVID-19 on the market in which CCI are operating

However, due to the lack of data for certain subsectors within the CCI, there has been a special emphasis on the Information and Communication Services sector, where if we follow the example of neighbouring countries we would expect a positive net trading position from the Computer Programming activity; this analysis, although useful, will still not provide the full picture of the situation.

The value of the goods is expressed on the basis of the prices achieved by the companies when concluding their contracts. *Net trading position* is the difference between exports and imports for a given period.

In the analysed period (See table 32), which in the case of foreign trade also includes 2021, all sectors except for the section for Creative, artistic and entertainment services in the sector of Art, entertainment and recreation realised a negative net trading position, i.e. they had a higher number of imports than exports. Only the section for Creative, artistic and entertainment services in all five analysed years continuously achieved a positive net trading position, i.e., a higher proportion of exports to import. In 2019, the section achieved a positive trading position more than four times higher than the sum of the positive net trading positions for the four remaining analysed years. Therefore, such position for this section in 2019 can be considered an exception, i.e., an announcement of growth in the pre-pandemic period, which unfortunately was stopped during the COVID-19 crisis.

⁷⁸ Technology for delivering video content, such as movies and television shows, directly to individual customers for immediate viewing

Net trading position in thousand EUR	2017	2018	2019	2020	2021	Percentage increase from yr. in yr.			
						2018	2019	2020	2021
Total foreign trade of the country	-1,816,215	-1,803,845	-2,007,749	-1,816,632	-2,715,717	-1%	11%	-10%	49%
Wood and articles of wood and cork, except furniture; straw products and plaiting materials	-70,558	-72,623	-72,753	-78,920	-90,719	3%	0%	8%	15%
Information and communication services	-5,670	-6,659	-5,296	-6,781	-6,016	17%	-20%	28%	-11%
Publishing services	-4,718	-5,499	-3,669	-4,902	-3,941	17%	-33%	34%	-20%
Services for the production of film, video and television programmes, sound recording and music publishing	-950	-1,160	-1,627	-1,878	-2,075	22%	40%	15%	10%
Professional, scientific and technical services	-55	-10	1	-39	-9	-82%	-110%	-4000%	-77%
Architectural and engineering services; technical testing and analysis services	-17	-10	1	-6	-9	-41%	-110%	-700%	50%
Other professional, scientific and technical services	-38	0	0	-33	0	-100%	0%	0%	-100%
Art, entertainment and recreation	55	60	1,472	109	110	9%	2353%	-93%	1%
Creative, art and entertaining services	57	61	1,472	109	114	7%	2313%	-93%	5%
Library, archive, museum and other cultural services	-2	-1	-1	0	-4	-50%	0%	-100%	0%

Table 32: Net trading position per sector (2017-2021)

In terms of the growth rate, the sections for Services for the production of film, video and television programmes, sound recording and music publishing and wood and cork products, except furniture; straw products and plaiting materials, had a growth rate leading to a negative trading position in the entire analysed period, i.e. not only do they import more than they export, but their imports increased.

By comparing the export and import of cultural goods between North Macedonia and other countries, the value attributed by North Macedonia to cultural goods is one of the lowest in Europe, similar to Montenegro and Albania⁷⁹. (See Table 33)

⁷⁹ Source: Eurostat (2022) Intra and extra-EU trade in cultural goods by product (online data code: CULT_TRD_PRD). Retrieved on 06.03.2022 from https://ec.europa.eu/eurostat/databrowser/view/CULT_TRD_PRD/default/table?lang=en&category=cult.cult_trd_go

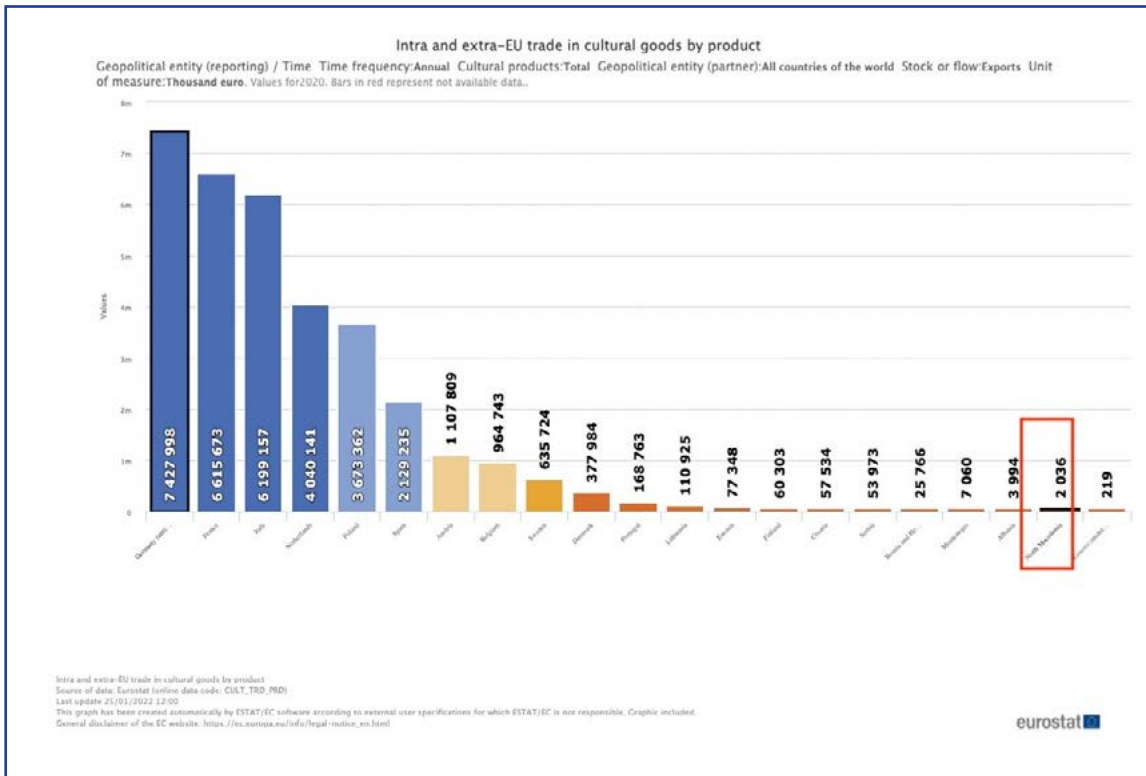


Table 33: Intra and Extra-EU trade in cultural goods by product

Findings about the impact of COVID-19 on the distribution and sale of arts goods show that 33.54% of the respondents feel that COVID-19 has had a high impact, 36.02% a medium one, and 30.43% a low impact (See Table 34). The main reasons for the high and medium impact of COVID-19 on the distribution and sales mentioned by the respondents were as follows: very strong restrictions that the government enforced (total lockdown for many days, etc.), which negatively affected contact with clients; difficulties in terms of access to arts products; changing consumption patterns; limited skills in online communication and digitalisation, including online banking, etc. One of the comments was related to adaptability and flexibility: “Organisations that were more flexible succeeded in this situation”.

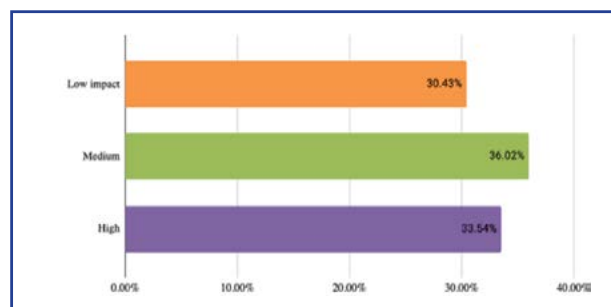


Table 34: Impact of COVID-19 on the distribution and sale of arts goods

5.9.7 Cultural expenditure of households

The key figures concerning household consumption expenditure on culture-related goods and recreation are given in Table 26., In the 2017-2020 period⁸⁰, there was a negative trend, meaning decreasing expenditures from 106.3 EUR in 2017 to 67.3 EUR in 2020 per household. (See Table 35)

The portion of cultural expenditure of total expenditure decreased from 1.8% in 2017 to 1.2% in 2020.

Expenditures of private households on cultural goods and recreation	2017	2018	2019	2020
Average expenditure per household (in EUR)	106,3	101,4	89,1	67,3
Average per household member (in EUR)	29	27,7	24,3	18,42
Portion in total expenditures (in percent)	1.8	1.7	1.6	1.2

Table 35: Expenditures of private households on cultural goods and recreation

The average expenditure of private households on cultural goods and recreation in rural areas increased from 13.2 EUR in 2017 to 82.5 EUR in 2020⁸¹, whereas an urban household's expenditure on cultural goods and recreation decreased from 111.7 EUR in 2017 to 89.86 EUR in 2020. The data shows that in 2019 people living in rural areas were keener towards spending more money on cultural goods and recreation than those living in urban areas.

5.10. Cultural Tourism

Travel has come to play a very important role in the lives of people today. The number of travellers has grown exponentially in the last decades and now tourism plays an important role in North Macedonia's economy. Specifically, the World Tourism Organization (WTO) has recognized that heritage and culture have become a component in almost 40 percent of all international trips undertaken (Dallen J. T. Boyd W. S. 2003: 1).

80 Source: State Statistical Office of the Republic of North Macedonia (NA) Upotrebeni sredstva spored namenata na potroshuvachkata, po COICOP klasifikacija i tip na domakjinstvo, po godini (Used assets according to purpose of consumption, by COICOP classification and type of household, by years by used assets according to COICOP classification, year, type of household and measures). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_ZivotenStandard_AnketaZaPotrosuvackaDomakinstva/150_ZivStand_mk_UPOTREBENI_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

81 Source: State Statistical Office of the Republic of North Macedonia (NA) Upotrebeni sredstva spored namenata na potroshuvachkata, po COICOP klasifikacija i tip na domakjinstvo, po godini (Used assets according to purpose of consumption, by COICOP and type of household, by years by used assets by COICOP classification, year, type of household and measures). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_ZivotenStandard_AnketaZaPotrosuvackaDomakinstva/150_ZivStand_mk_UPOTREBENI_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

The concept of Cultural Tourism here is understood not only as the visitation of heritage sites and monuments, but also includes the consumption of cultural products as well (from food to contemporary art).

In North Macedonia, there are 11,200 registered cultural monuments (immovable cultural heritage). Among them, the most prevalent are archaeological sites with 4,260, while there are also 1,726 churches and monasteries with over 150,000 m₂ of fresco paintings, then 1,213 objects from old urban and rural architecture, 47 towers, fortresses, and bridges, 1,026 monuments and memorials, 126 buildings of Islamic architecture, 24 Bazaars and other historical, urban-architectural estates and objects⁸². The major proportion of the immovable cultural heritage, or about 45%, is in rural areas and mountain areas that are fully or partially abandoned, making their protection and use more difficult.

There are 1123 registered objects in the National Registry of Public Goods created by the Ministry of Culture and last updated on 31 December 2021. Out of 84 municipalities, 11 municipalities lack an object registered in the centralised database as a protected public good in relation to cultural heritage⁸³.

According to the latest data from the State Statistical Office from 2015, museums cover an area of 47,755 m₂, in 610 room spaces, where 222,850 inventory museum pieces, in addition to 245,291 non-inventory items, are gathered⁸⁴.

The number of tourists to North Macedonia increased in 2016, 2017, 2018, and 2019, with stagnation in 2020, due to the COVID-19 crisis. (See Table 36)

82 Source: Parliament of the Republic of North Macedonia (2004) Spatial plan of the Republic of Macedonia. Retrieved on 06.03.2022 from <http://app.gov.mk/wp-content/uploads/2015/04/%D0%9030104-PP-na-RM-2002-2020.pdf>

83 Source: Ministry of Culture (2013) Nacionalen registar na objekti koi se zashtiteno kulturno nasledstvo (National registry of objects that are protected cultural heritage). Retrieved on 06.03.2022 from <http://arhiva.kultura.gov.mk/index.php/odnosi-so-javnost/2011-03-04-10-39-07/882-nacionalen-registar-na-objekti-koi-se-zashtiteno-kulturno-nasledstvo>

84 Source: State Statistical Office of the Republic of North Macedonia (NA) Zbirki po vidovi spored osnovachot na muzejot (Collection based on the type of museum establisher). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Muzei/325_Kultura_Mk_T5Muzei_mk_lekt.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef; State Statistical Office of The Republic of North Macedonia (NA) Prostorii i povrshina spored osnovachot na muzejot (Space and museum area based on the type of establisher of museum). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Muzei/425_Kultura_Mk_T7Muzei_mk_lekt.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef; State Statistical Office of the Republic of North Macedonia (NA) Posetiteli spored osnovachot na muzejot (Audience based on the type of establisher of museum). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Muzei/125_Kultura_Mk_T1Muzei_mk_lekt.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

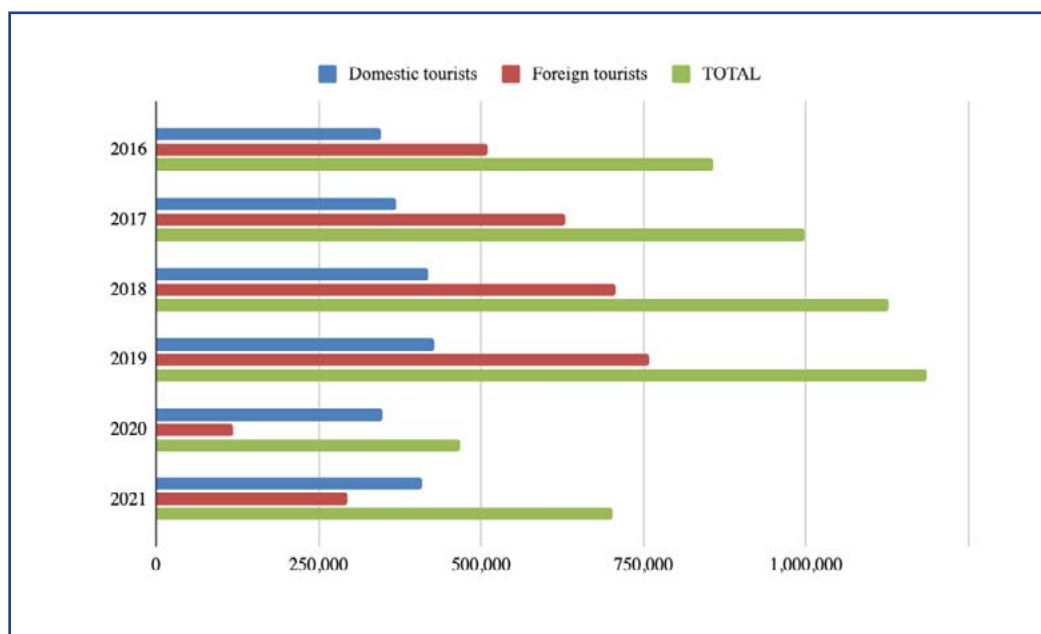


Table 36: Number of tourists to North Macedonia (2016-2021)

In 2021, the number of tourists to North Macedonia increased by 50.3%, as the number of foreign tourists who visited North Macedonia in 2021⁸⁵ reached 293,963, compared with 118,206 for the previous year. Domestic tourists increased by 16.9%, and foreign tourists by 148.7%.

Out of the total number of foreign tourists who visited North Macedonia in December, 15% came from Serbia, 12.3% from Turkey, and 8.4% from Greece⁸⁶.

The available data regarding the visits of foreign tourists to North Macedonia⁸⁷ is classified into general groups concerning purposes of their travel, such as vacation and recreation, business needs, visiting relatives and friends, and “other”. The data regarding cultural tourism is not provided separately. (See Table 37)

85 Source: State Statistical Office of the Republic of North Macedonia (2022) Tourism, December 2021. Retrieved on 06.03.2022 from https://www.stat.gov.mk/pdf/2022/8.1.22.03_mk.pdf

86 Source: https://www.euractiv.com/section/politics/short_news/north-macedonia-sees-large-increase-in-tourism/

87 Source: 2016: State Statistical Office of the Republic of North Macedonia (2016) Survey on foreign visitors at border crossings, 2016. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/Publikacii/8.4.17.01.pdf>

2019: State Statistical Office of the Republic of North Macedonia (NA) Survey on foreign visitors at border crossings, 2019. Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_TurizamUgostitel_Turizam_AnketaStranskiPosetiteli/125_Turizam_RSM_Prestoj_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

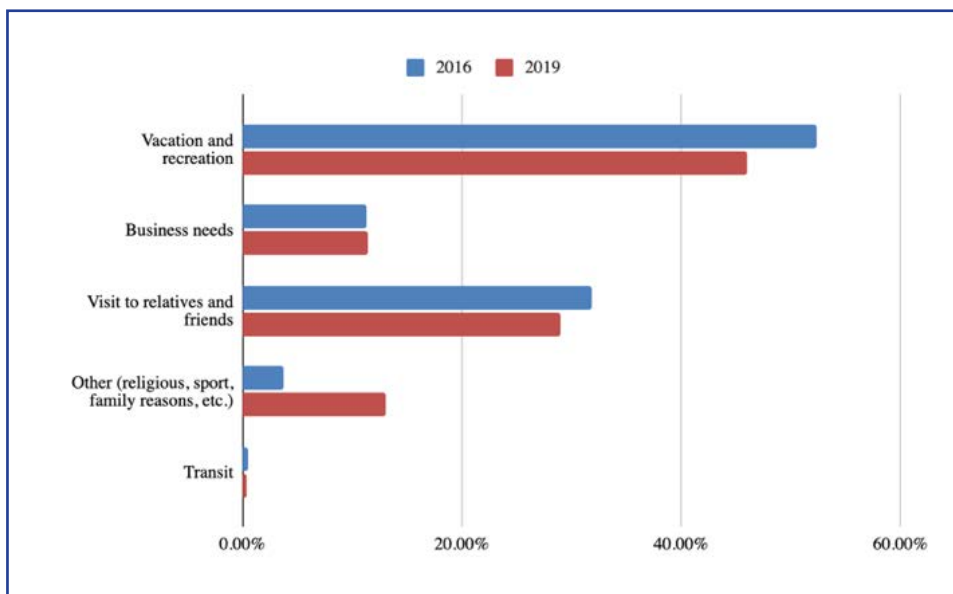


Table 37: Foreign visitors by purpose of visit (2016 and 2019)

Note: The survey on foreign tourists` purpose of visit, service rating and other tourism-related issues is conducted only in several year-intervals. The latest available data is from 2016 and 2019. The data depicted includes input from the survey conducted at the border-crossings.

The available data about service rating⁸⁸ from the visitors who visited archaeological and historical resources in North Macedonia reveals that the visitors gave high grades for these services: 4.5 (in 2016) and 4.23 (in 2019) out of a maximum grade of 5.

The available data from the Makstat Database about the number of visitors to museums, theatres, philharmonic orchestra, visual arts exhibitions and cinemas, lack coherency, systematisation, and continuity. The only trend that we can see from the available data is the growing number of visitors at visual arts exhibitions from 229,948 visitors in 2017 to 281,311 visitors in 2018⁸⁹.

In 2015, there were 476,385 visitors to the museums across the country.⁹⁰

88 Source: 2016: State Statistical Office of the Republic of North Macedonia (2016) Survey on foreign visitors at border crossings, 2016. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/Publikacii/8.4.17.01.pdf> 2019: State Statistical Office of the Republic of North Macedonia (NA) Survey on foreign visitors at border crossings, 2019. Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_TirizamUgostitel_Turizam_AnketaStranskiPosetiteli/125_Turizam_RSM_Prestoj_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

89 Source: State Statistical Office of the Republic of North Macedonia (NA) Organizirani likovni izlozhibi (Organised visual art exhibitions). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_LikovnaDejnost/125_Kultura_RM_T1Ld_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

90 Source: State Statistical Office of the Republic of North Macedonia (NA) Posetiteli spored osnovachot na muzejot (Visitors based on the establisher of the museum). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/MakStat_Kultura_Muzei/125_Kultura_Mk_T1Muzei_mk_lekt.px/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

In 2016/2017, there were 17 professional theatres, two professional theatres for children and youth, and eight amateur theatres. During this season, professional theatres held 193 performances, while the professional theatres for children and youth held 29 performances, and the 8 amateur theatres held 20 performances. During this season, the professional theatres had 238,200 visitors, the professional theatres for children and youth have had 20,512 visitors, and the amateur theatres had 19,287 visitors⁹¹.

Additionally, in 2016/2017, the philharmonic orchestra held 30 concerts with 34,250 visitors⁹².

In 2017, there were 575 visual arts exhibitions, while the number of exhibitions in 2018 increased to 622 events. There were 229,948 visitors in 2017 and 281,311 visitors in 2018 to these visual arts events⁹³.

In 2017, there were 14 cinemas where 967 movies were screened to 471,288 visitors⁹⁴.

From the available data, the precise number of cultural tourists cannot be defined, however the touristic trends demonstrate that the interest in North Macedonia as a travel destination, as well as in its cultural goods and products, is growing. The potential of heritage sites, monuments, and cultural goods and products is high and needs to be further developed. Cultural tourism is to be interlinked with other sectors such as transport, infrastructure, ecology, sustainability, healthcare, security, social affairs, well-being, etc. Therefore, the development of this sector needs to be interlinked with other sectors in the country.

91 Source: Ministry of Culture (NA) Vnatreshna organizacija na Ministerstvoto za kultura –sektori (Internal organisation of the Ministry of Culture – sectors). Retrieved on 06.03.2022 from <http://kultura.gov.mk/ministerstvo/>

State Statistical Office of the Republic of North Macedonia (NA) Broj na teatri I izvedeni dela po vidovi I opštini (Number of theaters and performances based on type and municipality). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Teatri/125_Kultura_RM_T1Teatri_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

State Statistical Office of the Republic of North Macedonia (NA) Broj na prestavi i posetiteli vo teatri, po opštini (Number of performances and visitors in theater, by municipalities). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Teatri/225_Kultura_RM_T2Teatri_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

92 Source: State Statistical Office of the Republic of North Macedonia (NA) Makedonska Filharmonija – koncerti i posetiteli (Macedonian Philharmonic Orchestra - concert and visitors). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Teatri/475_Kultura_RM_T7filharmonia_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

93 Source: State Statistical Office of the Republic of North Macedonia (NA) Organizirani likovni izlozhbi (Organised visual art exhibitions). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_LikovnaDejnost/125_Kultura_RM_T1Ld_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

94 Source: State Statistical Office of the Republic of North Macedonia (NA) Kina spored brojot na prikazhani dolgometrazhani filmovi, prestavi i posetiteli (Cinemas according to the number of shown feature films, cinema performances and attendance, by municipality). Retrieved on 06.03.2022 from http://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_Kultura_Kina/175_Kultura_RM_T2Kino_ml.px/table/tableViewLayout2/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef

6. COVID-19 MITIGATION MEASURES FOR THE CCI SECTOR IN NORTH MACEDONIA

6.1. Policy Measures (Mitigation measures - COVID-19)

The Government of North Macedonia created measures for mitigating the COVID-19 crisis that were general, supporting all active enterprises and individuals. However, the measures for mitigating the impact of COVID-19 crisis in North Macedonia related to the CCI sector were very limited and without clear strategic orientation. All entities—from CSOs, enterprises of all types, to humanitarian organizations—were put together in one group using the same criteria.

All general mitigation measures were managed by the Government and were implemented as direct and indirect support. All of them were administrated by the Development Bank of North Macedonia, the MoC, and the North Macedonian Film Agency.

There was only data on the mitigating measures available for 2020.

The direct support given to entities and individuals, of which some stakeholders from the CCI sector benefited, are the following:

- Financial support for those with low income, pensioners, beneficiaries of the right to social security for the elderly, young people, single parents, children without parents and parental care, artists and other persons performing activities in culture, film workers, and folk artists.⁹⁵ This was a one-time financial aid intended for the purchase of domestic products in the amount of app. 100 EUR. A total of 283 000 persons received this support, out of which, 520 persons are artists and other persons performing activities in culture. The total budget for this support line was 1.6 billion MKD (25,93 million EUR), while the received support for persons from the CCI was app. 50,571 EUR.⁹⁶
- Financial support of artists and other natural persons who independently perform activities and other activities in the field of culture during a state of emergency.⁹⁷ This instrument aimed to cover the costs for minimal salaries for April and May 2020. This was administrated by the MoC. Three cultural workers received support of app. 470 EUR, with a total budget of the instrument of app. 1,410 EUR.⁹⁸ (See Annex VI).

⁹⁵ Official Gazette of RNM no. 290/20, 92/21

⁹⁶ Source: Government of the Republic of North Macedonia (2020) Kupuvaj domashno (Buy domestic). Retrieved on 06.03.2022 from <https://www.kupuvamdomasno.gov.mk/mk/info>; Government of the Republic of North Macedonia (2020) Zaev: So paketot 4 ekonomski merki vreden 470 milioni evra obezbeduvame oddrzhlivost na domahsnite ekonomski dejnosti I na rabotnite mesta, zakrepuvanje na odredeni dejnosti, stabilnost na socijalni transferi I pottik na javnata potroshuvachka (Zaev: With the package of 4 economic measures worth 470 million euros, we ensure sustainability of domestic economic activities and jobs, recovery of certain activities, stability of social transfers and stimulation of public spending). Retrieved on 06.03.2022 from <https://vlada.mk/node/22629>; Ministry of Finance (2020) Usvoen chetvrtiot paket merki (The fourth package of measures was adopted). Retrieved on 06.03.2022 from: [LINK](#)

⁹⁷ Source: Official Gazette of RNM no. 139/2020

⁹⁸ Source: Ministry of Culture, Request for public information no. 03-23

- Financial support for film employees during the state of emergency⁹⁹. This support was aimed to cover the amount of minimal salaries for April and May 2020. A total of 61 film workers were supported with a net sum of 43,500 MKD (707 EUR). Total budget of the instrument: 2,65 million MKD (43,009 Euro)¹⁰⁰.
- Financial support for artists and cultural workers¹⁰¹, a one-time payment of financial means for a period of three months. Scaled monthly net remuneration based on income: 14,500 denars, 18,000 MKD (300 EUR) or 21,500 MKD (350 EUR), if in the period from January to August 2020 their net income was up to 80,000 MKD, or up to 60,000 MKD, or up to 40,000 MKD No data was provided by the MoC on the number of beneficiaries of this support line.
- Financial support for film workers¹⁰², a one-time payment of financial means for a period of three months. 28 film workers were supported with this instrument with a total budget of 1,7 million MKD (27,741 Euro).¹⁰³
- Financial support for folk artists during the state of emergency¹⁰⁴, a payment for the months of April and May 2020. Approximately 731 artists were supported with a total amount of 15,9 million MKD (258,015 EUR).¹⁰⁵
- Financial support for economic activity and the revival of economic activities of legal entities in accordance with the Company Law, registered with the following activities (90.04, 90.02, 90.01, 82.30, 77.39, 74.20, 73.11, 59.20, 59.11, 47.43, 46.52, 26.40) by hiring domestic artists, performers, and subcontractors. This instrument was aimed at legal entities that organise public events engaging only domestic performers, cultural workers, artists, musicians, and other professionals in the events organisation industry. A total of 33 projects involving the organisation of public events in the June-September 2020 period were supported with a total amount of 61,5 million MKD (996,910 EUR).¹⁰⁶

The total amount that was distributed as part of the direct measures for mitigating COVID-19 crisis in North Macedonia, wherein a limited number of CCI (mostly individuals) benefited for 2020, was 91,12million MKD (1,47million EUR) (See Table 38)

99 Source: Official Gazette of RNM no. 139/2020

100 Source: Film Agency of North Macedonia, data supported based on Request for public information no. 11-325/1

101 Source: Official Gazette of RNM no. 297/20

102 Source: Official Gazette of RNM no. 297/2020

103 Source: Film Agency of North Macedonia, data supported based on Request for public information no. 11-325/1

104 Source: Official Gazette of RNM no. 154/20

105 Source: Government of the Republic of North Macedonia (2020) Od 28-mata sednica: Odobreni 8 milioni evra povekje vo Paketot 4 za poddrshka za spravuvanje so posledicite od KOVID-19 za dopolnitelni kategorii gragjani i kompanii (From the 28th session of the Government: Additional 8 million euros approved in Package 4 for support for dealing with the consequences of COVID-19 for additional categories of citizens and companies). Retrieved on 06.03.2022 from <https://koronavirus.gov.mk/vesti/219604>

106 Source: Government of the Republic of North Macedonia (2021) Rezultati za odobreni sredstva preku javniot povik za finansiska poddrshka na industrijata za organizacija na nastani na temi so koi se odbeležuva 30 godini nezavisnost na Severna Makedonija (Results for approved funds through the public call for financial support of the industry for organisation of events on topics that mark 30 years of independence of North Macedonia). Retrieved on 06.03.2022 from <https://vlada.mk/node/25624>

	Amount (in MKD)	Amount (in EUR)	Number of beneficiaries	Total support (in MKD)	Total support (in EUR)
Financial support to cultural and film workers and folk artists via the support line 'Buy domestic products'	6,000.00	97.25	520	3,120,000.00	50,571.36
Financial support to cultural workers	29,000.00	470.05	3	87,000.00	1,410.16
Financial support to film workers	43,500.00	705.08	61	2,653,500.00	43,009.97
One-time payment of financial means for artists and cultural workers	Scaled support based on income (14,500 denars, 18,000 denars or 21,500 denars)	/	NA	NA	NA
One-time payment of financial means for film workers	Scaled support based on income (14,500 denars, 18,000 denars or 21,500 denars)	/	28	1,711,500.00	27,741.31
Financial support for folk artists	21,776.00	352.96	731	15,918,256.00	258,015.33
Financial support of independent artists	43,500.00	705.08	141	6,133,500.00	99,416.48
Financial support for entities in the event industry	Support for large, medium-size and small projects	/	33	61,499,421.00	996,829.91
		TOTAL	1517	91,123,177.00	1,476,994.52

Table 38: Direct support to workers and entities in the CCI sector in 2020¹⁰⁷

The indirect support for entities and individuals from the CCI sector for 2020 includes:

- Subsidies for the payment of compulsory social insurance during the state of emergency¹⁰⁸. It aimed to cover up to 50% of these costs for the April-June 2020 period.
- Financial support for employers affected by the health-economic crisis caused by COVID-19, for the payment of salaries for the months of April, May and June 2020, up to 14,500 MKD (235 EUR)¹⁰⁹.

107 Source: Government of the Republic of North Macedonia (2020) Od 28-mata sednica: Odobreni 8 milioni evra povekje vo Paketot 4 za poddrshka za spravuvanje so posledicite od KOVID-19 za dopolnitelni kategorii gragjani i kompanii (From the 28th session of the Government: Additional 8 million euros approved in Package 4 for support for dealing with the consequences of COVID-19 for additional categories of citizens and companies). Retrieved on 03.06.2022 from <https://koronavirus.gov.mk/vesti/219604>; Ministry of Culture, Request for public information No. 03-23; Film Agency of North Macedonia, Request for public information no. 11-325/1; Government of the Republic of North Macedonia (2020) Ekonomski merki za spravuvanje so posledicite na KOVID-19 (Economic measures for dealing with the COVID-19 consequences). Retrieved on 03.06.2022 from <https://koronavirus.gov.mk/merki/ekonomski-merki>; Government of the Republic of North Macedonia (2021) Rezultati za odobreni sredstva preku javniot povik za finansiska poddrshka na industrijata za organizacija na nastani na temi so koi se odbeležuva 30 godini nezavisnost na Severna Makedonija (Results for approved funds through the public call for financial support of the industry for organisation of events on topics that mark 30 years of independence of North Macedonia). Retrieved on 03.06.2022 from <https://vlada.mk/node/25624>

Ministry of Finance (2020) Usvoen chetvrtiot paket merki (The fourth package of measures was adopted). Retrieved on 03.06.2022 from: [LINK](#) Government of the Republic of North Macedonia (2020) Zaev: So paketot 4 ekonomski merki vreden 470 milioni evra obezbeduvame oddrzhivost na domahsnite ekonomski dejnosti I na rabotnite mesta, zakrepuvanje na odredeni dejnosti, stabilnost na socialni transferi I pottik na javnata potroshuvachka (Zaev: With the package of four economic measures worth 470 million euros, we ensure sustainability of domestic economic activities and jobs, recovery of certain activities, stability of social transfers, and stimulation of public spending). Retrieved on 03.06.2022 from <https://vlada.mk/node/22629>;

108 Source: Official Gazette of RNM no. 21/2

109 Source: Official Gazette of RNM no. 111/20 and 113/20

- Subsidy for contributions from mandatory social insurance for employees in the media¹¹⁰. It aimed to subsidize social insurance for each employee for June, July and August 2020.
- Financial support for natural persons who carry out independent activities affected by the health-economic crisis caused by COVID-19 for an interim emergency¹¹¹. It was a payment in the amount of MKD 14,500 (235 EUR) for April, May and June 2020, for any citizens performing independent activity.

The quantified data on the funds available for indirect support for entities and individuals from the CCI sector for 2020 is not available; therefore, the total amount of both direct and indirect measures of the Government of the Republic of North Macedonia is not available.

In addition, the government of North Macedonia created a COVID-19 support interest-free credit line for reducing the impact of the crisis on the economy. According to the Development Bank of North Macedonia who administrated this instrument, 4120 recipients with a total amount of 2,72 billion MKD (44,14 million Euro)¹¹² were supported. (See Table 39)

COVID-19 support interest-free credit line for reducing the impact of COVID-19 on the economy	Number of recipients	Total budget (in MKD)	Total budget (in EUR)
COVID 1	737	337,829,314.00	5,475,797.29
COVID 2	639	491,692,500.00	7,969,730.12
COVID 3	2703	1,881,515,000.00	30,497,041.90
COVID 4	41	12,363,000.00	200,389.01
TOTAL	4120	2,723,399,814.00	44,142,958.33

Table 39: Covid-19 support interest-free credit line for reducing the impact of COVID-19 on the economy

The number of CCI users of this instrument was 25 (14 media entities); advertising agencies (2 entities); production of other products of wood, cork, straw, and plaiting materials (1 entity); production of travel and handbags, leather products and belts (1 entity); production of jewellery and related products (1 entity); production of ceramic household and decorative objects (1 entity); production of imitation jewellery and related products (1 entity)¹¹³. The total amount from the COVID-19 support interest-free credit line for CCI was 52 million MKD (842,872 EUR). (See Table 40)

110 Source: Official Gazette of RNM no. 156/20

111 Source: Official Gazette of RNM no. 92/2020

112 Source: Development Bank of North Macedonia, data provided based on Request for access to public information 03-498/2

113 Source: Development Bank of North Macedonia, data provided based on Request for access to public information 03-498/1 and 03-499/1

CCI users of the COVID-19 support interest-free credit line for reducing the impact of COVID-19 on the economy	Number of recipients	Code of activity	Total budget (in MKD)	Total budget (in EUR)
COVID 1	714	Media entities	43,520,000.00	705,405.62
COVID 2	7	73.11 Advertising agencies (2 entities); 16.29 Production of other products of wood, cork, straw and plaiting materials (1 entity); 15.12 Production of travel and handbags, leather products and belts (1 entity); 32.12 Production of jewellery and related products (1 entity); 23.41 Production of ceramic household and decorative objects (1 entity); 32.13 Production of imitation jewellery and related products (1 entity);	5,241,000.00	84,950.16
COVID 3	4	73.11 Advertising agencies (2 entities); 74.30 (2 entities);	3,240,000.00	52,516.41
TOTAL	25		52,001,000.00	842,872.19

Table 40: CCI users of the Covid-19 support interest-free credit line

6.2. City of Skopje

In addition to the national level support, the City of Skopje created measures for mitigating the COVID-19 crisis. In April 2020, the City of Skopje, in collaboration with the municipal cultural institutions, announced a public call for the financing of projects, as part of the mitigation measure titled “Culture in Corona Time”.

The purpose of the call was to support unemployed artists, i.e. those artists who lost their regular income during the strict COVID-19 protective measures period (fee in the net amount of 14 500 MKD, or 235 EUR) and support projects (performances in the city neighbourhoods lasting up to two hours; (the technical equipment was provided by the cultural institutions of the City of Skopje) and virtual exhibitions, performances, performances, concerts, workshops for children lasting up to two hours).¹¹⁴

The call spent in total 2.7 million MKD (43,767 EUR) subsidising 168 artists, cultural workers, and technicians, in addition to the hired employees from the Youth Cultural Centre, The Cultural-Information Centre and the Universal Hall.¹¹⁵

The city provided open stages for live performances in 28 different urban areas located in 8 municipalities. 50 concerts were organised in April and May 2020.¹¹⁶

No data is available for other municipalities from North Macedonia in relation to mitigation measures for the COVID-19 crisis and the CCI sector.

¹¹⁴ Youth Cultural Center (2020) Grad Skopje/Kultura vo vreme na Korona – Povik 1: Izvedbeni I onlajn aktivnosti (City of Skopje/Culture in time of Corona - Call-1: Performing and online activities). Retrieved on 06.03.2022 from https://mkc.mk/vesti/grsk_povik1/; City of Skopje (2020) Kulturen proekt ‘Kultura vo vreme na Korona’ (Cultural project ‘Culture in time of Corona’). Retrieved on 06.03.2022 from: [LINK](#)

¹¹⁵ City of Skopje (2020) Posle 50 maalski koncerti vecher zapira ‘Kultura vo vreme na Korona’ (After 50 concert, tonight ‘Culture in time of Corona’ ends). Retrieved on 06.03.2022 from <https://skopje.gov.mk/mk/vesti/2019/10-05-2020-kultura-vo-vreme-na-korona-zavrсно/>

¹¹⁶ City of Skopje (2020) Kulturen proekt ‘Kultura vo vreme na Korona’ (Cultural project ‘Culture in time of Corona’). Retrieved on 06.03.2022 from: [LINK](#)

6.3. EU Delegation in Skopje

The Europe House's Call for Rapid Grants¹¹⁷ was launched after the COVID-19 crisis, supporting cultural and creative industries with a budget of around 27.000 EUR.

Furthermore, in addition to the funds provided by the Government of North Macedonia, the EU provided 30 million EUR that were distributed through the Macedonian Development Bank through loans (without interest rates) for micro, SMEs, and crafts(wo)men in max. amount of 15,000 EUR per application. As part of the loans, there was a possibility for applicants to apply for a 30% grant out of the received loans. However, the EUD is still waiting for the report on the distribution of funds.

In summary, the Government of North Macedonia created general measures for mitigating the COVID-19 crisis, supporting all active enterprises and individuals in the country. The measures for mitigating the COVID-19 crisis in North Macedonia related to the CCI sector were very limited. This is mainly due to the lack of clear policy for the development of the CCI sector even before COVID-19 and the lack of analyses and understanding of the sector. The specific needs of the sector were not taken into consideration when creating these measures. From the other side, the CCI sector was not strong enough to advocate and influence the decisions related to the mitigation measures.

Very little support was given to CCI in the form of income-generating measures; cost/tax reductions; social security benefits, legal framework modifications and status of the artists and other CCWs; support for innovation and digital transformation, capacity-building programmes, and affordable financial credits.

This limitation regarding the mitigating measures is related to the number of entities and individuals from the CCI sector that benefited from these measures (a rather limited number of entities and individuals got support). In addition, the measures were of a short duration and mainly focused on individuals, without clear strategic orientation or previous analysis of the needs of both entities and individuals. The support for economic operators in the private sector was also very limited.

6.4. CCIs' Perspective towards the COVID-19 mitigation measures

The CCI representatives were asked if they received support from the public authorities to mitigate the COVID-19 crisis, and 74.5% did not receive any support; meaning only 24.47% were supported. Regarding the question about the kind of support for those that were supported, 46.4% received income-generating support measures; 17.9% cost-reduction measures; 8.9% measures related to the legal framework, modification, and status of the arts. 17% of the respondents received support in other forms than the ones listed, such as loans and project support from the City of Skopje. (See Table 41)

¹¹⁷ Source: EU Delegation in Skopje, Data provided based on Request for information (February 2022)

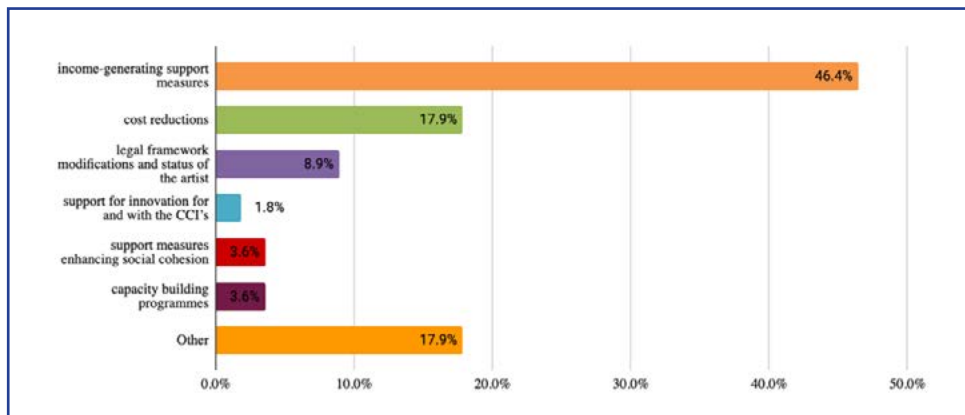


Table 41: CCI users for Covid-19 support

The findings from the survey show that for those CCIs which received financial support, the amount they got from the public authorities ranged from up to 1000 EUR (59.5%), to between 1001-5000 EUR (18.9%) and between 5000-25 000 EUR (21.6%). (See Table 42)

The comments from the majority of the respondents were critical as to the amounts that the public authorities have granted for the CCI sector with direct support for covering salaries, as being very low and insufficient to cover even part of the salaries.

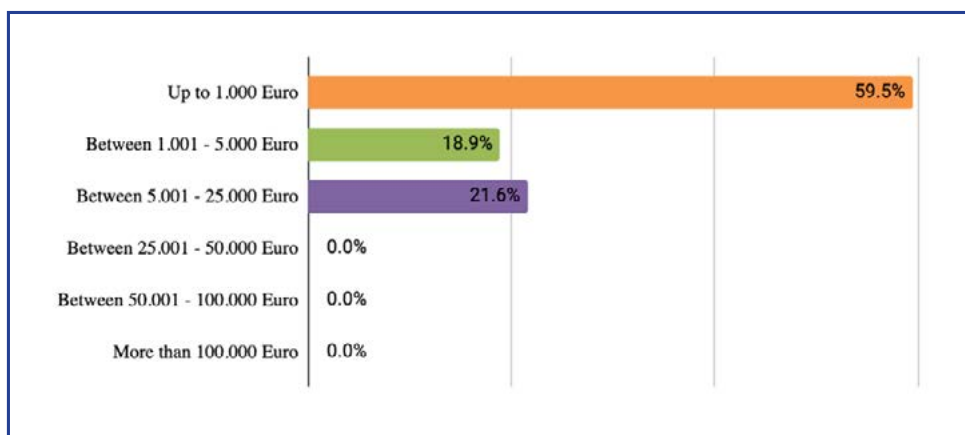


Table 42: Monetary support, amounts that the CCI received from public authorities

The majority of respondents received international support during the COVID-19 crisis (86.96%), of which 24.1% were supported by the European Commission; 10.3% by the US Embassy; 17.2% by the Goethe Institute, and 48% by other donors such as the British Council, UNESCO; private foundations, the German fund for crisis for students and artists, Japanese Embassy, etc. (See Table 43)

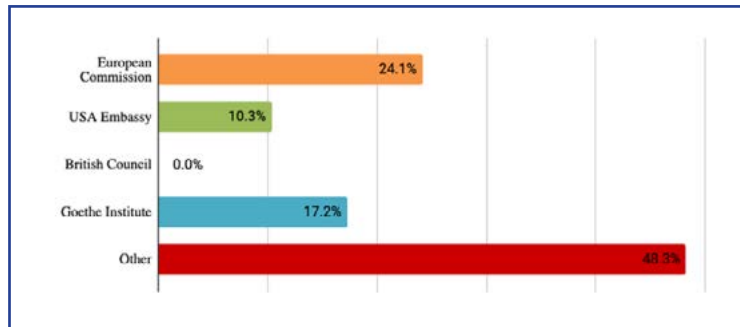


Table 43: International support for CCI during COVID-19

The respondents were asked about their opinion regarding the type of support and policy measures they need from the public authorities in reference to the COVID-19 crisis. Most respondents would like to have cost-reduction related measures (18.3%); income-generating support measures (15.3%); non-refundable funds for dealing with the crisis caused by COVID-19 (15.1%); capacity building programmes (12.8%), legal framework modification and status of the artists (12.8%), etc. (See Table 44)

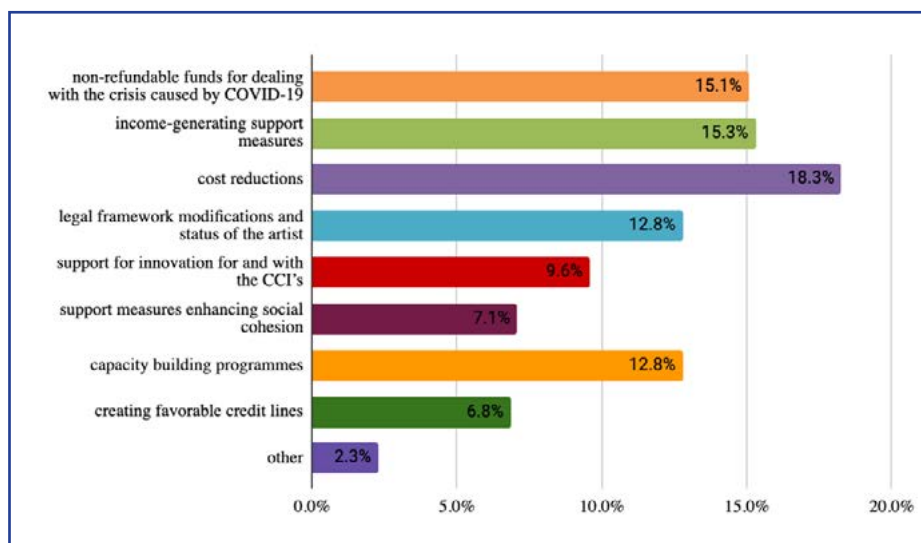


Table 44: Types of support and policy measures that CCI needs from the public authorities for dealing with the crisis caused by COVID-19

The final general comments from the respondents regarding the CCI sector and the COVID-19 crisis were mainly focused on their criticism of the government and the Ministry of Culture for their ignorance of the needs and challenges of the CCI sector, even long before COVID-19. This includes comments about bad management, low transparency, politicization, a lack of strategic orientation; ad hoc decisions; not recognizing the potential of the CCI sector; and insufficient investments in the CCI sector.

According to the survey, the recommendations received from the respondents for the public authorities go beyond the COVID-19 crisis, and are focused on the following:

- Creating a sustainable cultural policy based on the analyses of the current situation of the CCI and not on ad hoc decisions (better understanding the challenges of the CCI sector);
- Improvement of the transparency of the public sector (MoC);
- Defining clear criteria (based on quality) and procedures for awarding grants;
- Creating a multi-year financial support for the CCI;
- Reforming the administration in the cultural field (less bureaucracy and shortening the procedures, skilled people in the positions in the public institutions);
- Minimizing the political influence in the cultural field;
- Digitalization in the public sector (developing new skills, procedures, infrastructure) and support for other entities from the CCI sector in the process of digitalization;
- Systematization and definition of criteria by which non-institutional cultural workers can be recognised and thus adequately supported (monthly fees for their work in the cultural sector);
- Creating a facilitating tax policy for the CCI;
- Creating local CCI development strategies (for example, engaging local creators, creating online portals and platforms to enable municipalities and businesses to hire local artists, musicians and performers for smaller local events);
- Creating a new strategy for film distribution (particularly for European movies);
- The events industry should become a separate subsector of the CCI; (creation of legal solutions that will improve the industry and strengthen the capacities and condition of the operators in the event industry);
- To adopt the Law on Public Interest in Culture which has been stuck in a parliamentary procedure for three years;
- Non-refundable financial assistance is crucial to help those who have been most affected;

7. SUBSECTORS OF THE CCI AND THEIR SPECIFICITIES DURING COVID-19: KEY OBSERVATIONS

7.1. Cinema

Cinema in North Macedonia is not yet developed at the industrial level, as there are only three cinemas in the entire country. However, this subsector was affected negatively by COVID-19, with the ensuing consequences resulting in great economic loss, and the loss of audiences who redirected themselves toward online streaming and platforms. This branch is also related to film festivals, which completely closed during the crisis.

Maintaining the contact with the audience was the main challenge. Their adaptive capacity to digitalization, team experience, and capitalization on regional (Western Balkan) partnerships made it possible for the sector to continue working.

Decentralization (spreading out smaller scale activities across other cities), building the capacities of local communities, and vesting power in these smaller cities could be one of the solutions for the future. Governmental support is needed for this kind of activity.

7.2. Press and publishing

The COVID-19 crisis only exacerbated the already challenging situation in the media. In the bigger picture, the profession is endangered because there is no infrastructure in any sense, neither for commercial-economic work nor a policy of institutional grants needed to sustain and develop news teams. Most of the press agencies (particularly those digital) are project- and grant-oriented; there is no economic logic in relying only on income from sales or subscriptions. The reason for that is that the market is very small. From the other side, a more challenging issue are copyrights and the protection thereof. Namely, the serious agencies, such as “Sakam da kazam” (<https://sdk.mk/index.php/mk/>), have an authorial approach wherein journalists are producing original articles for the portal. However, many other agencies illegally plagiarize their articles and sharing it as their own content. The ones that produce such content lack the funds to initiate any liability cases against copyrights infringers. In addition, as mentioned previously, the segment of copyright and related rights and intellectual property is even more problematic because of the overall situation of the judicial system in North Macedonia, which is slow, bureaucratized, and according to the majority of respondents, still very corrupt.

Before any kind of state support for the press is planned, a fair, verifiable, and merit-based system for access to public money needs to be developed, as the lack of it would make the road to abuse very short.

7.3. Audio-visual

This sector was strongly affected by the COVID-19 crisis, especially as it is characterized by its project-based orientation and irregular business framework. All activities in this subsector are driven by a large number of individuals, creative people, artists, entrepreneurs, enterprises, and freelancers that all have been negatively affected by the crisis. Production processes were stopped by the restrictions that the government adopted, and massive job and income losses in this sector resulted. Many projects fell apart, and there were many interrupted productions, presentations, and distribution activities.

However, this situation led to new opportunities for this sector and many new initiatives related to digitalization took place. An excellent example of this is the production company named OXO, that adapted to the new situation quickly and launched the first Macedonian streaming platform [glej.mk](https://oxo.mk/contact/) (<https://oxo.mk/contact/>).

However, all of these good practices are facing major challenges in the environment they are operating. The public institutions were the main barrier and obstacle to any work and productions. During the crisis, the new reality was an excuse for the public institutions to stop working and to cease paying attention to the needs of the others. According to representatives from this sector, the initiatives from the private sector were ignored, as well as efforts to remedy some of the challenges related to COVID-19, such as the impact over education. Another lesson learned from this sector is that the smaller entities are more flexible and more resilient. The same production company, OXO, succeeded at offering home education after only two days, compared to the BBC which took two weeks to start offering similar content.

In general, there is great disappointment with the public authorities on many levels, starting from the distribution of public money, and ending with a simple issuance of a license for work.

7.4. Music industry

The music industry has been hit hard by COVID-19 where the live performance revenue was the biggest casualty. The industry is fighting back with new ways to monetize music consumption and innovative models: online streaming concerts and performances. The crisis is likely to accelerate underlying trends in the music industry, based on the importance of streaming. However, not all musicians and CCWs in this sector in North Macedonia could adapt to the digital transition to online streaming, mainly because of a lack of skills, in particular regarding digital marketing and the distribution of content. Many musicians were left without any income and were faced with existential problems. Some of them were even forced to start working in other sectors, taking on jobs as graphic designers or web designers. The support from the government during the crisis was almost non-existent.

One of the biggest challenges for this sector is the issue of copyrights and intellectual property enforcement, as the copyright sphere remains ineffective despite the laws. The system and software that is used for regulating this issue (such as giving points to the music style) is outdated and leaves much room for speculation, manipulation, and corruption.

The music field lacks regulation, and this makes it impossible to set the conditions under which musicians operate, and thus, currently, cash payment is preferred and many of the representatives from this sector are left in a grey area.

Furthermore, the representatives from this sector deeply believe that the existing system of financing culture needs to be changed. In addition, political influence in this sector is evident and negatively influences the overall sector.

7.5. Cultural Heritage and museums

Cultural Heritage sites and museums in North Macedonia are part of the public institutions network. Most of them were completely closed while some of them were open to a very limited number of visitors during

the COVID-19 crisis. Many museums around the world turned to virtual tours, digital exhibitions, special podcasts, and video games as alternative solutions, while this subsector in North Macedonia, with very few exceptions, remained closed without many activities or new ideas. One of the historical sites, Stobi, was one of the very few to emerge with new digital content, trying to develop further activities related to digital content. The main challenges that this subsector has faced is related to the lack of young staff equipped with digital skills, and understanding the new global trends in the field. In addition, a lack of support from the Government to this sector is evident.

The economic impact on the institutions was significant due to a lack of tourists and visitors, and yet, the new situation did not prevent the teams from conceiving of different forms of partnerships with CSOs, institutions and companies to acquire new funds via projects. The expectation of the subsector is that the Ministry of Culture should rationalize the budget; prioritize the needs and avoid a populist approach when public funds are in question (“everyone gets a little bit, no one is satisfied”). In addition, a self-sustainable institutional model should be promoted.

7.6. Architecture

Before COVID-19 there was a traditional office place working style within the architectural field in North Macedonia, with working hours within the office, site visits and meetings. The lockdown due to COVID-19 provided a chance to adapt to the “working from home” model, through which many things can be managed with an optimum use of resources and with slashed overheads to save time and money. Because of COVID-19, little or no space is required for architecture and associated professional start-ups who were having their offices in co-working spaces. The virtual mode of working helped to achieve new levels of digital proficiency for the office staff in the architectural profession. This eventually provided flexibility and convenience to those office staff working from home during the COVID-19 lockdown in North Macedonia, and that can be continued to some extent in the future so as to provide flexibility in working environments.

This proved to be a good time for the architects to acquire new skills, enhance their knowledge and develop new design ideas. It was high time for some architects to reorganize their office working styles and to lay down a new methodology of working.

In addition, this situation helps Macedonian architects to be part of the global market. The subsector was open and ready to adapt to the digital transition, using new tools and new technology. This was a shock for the sector, but many entities adapted very quickly, which accelerated the positive economic feedback.

7.7. Video Game industry

Covid-19 entailed unexpected positive consequences for the video game industry. People spent more time at home, and they turned to playing video games to socialize and get away from stress. The video game industry has been more resilient than the other subsectors, and it is one of the fastest growing segments

of the CCI in North Macedonia. Yet, this subsector is not recognized by the government, and no serious programme or strategy at the national level, nor knowledge of what the gaming industry means globally, exist. The Government lacks reference points as to how to value the economic impact from the gaming industry. An excellent example of this is “Furious Avocado” (<https://furiousavocado.com/#games>), a studio dedicated to indie games, which produced a game called Tie Dye which ranked as the global number 1 at one point with over three million downloads in under a week. Even this type of example is completely neglected by the government, not being seen as viable or economically prolific.

However, this sector is facing a lack of competent human resources trained in the gaming field. The existing training in the formal higher education (for example the Dramatic Arts Academia in Skopje) is outdated, and due to the lack of talent, there are limits to the developmental projections of the companies. The other challenge refers to the bureaucratic problems regarding registration, problems in acquiring an adequate code for the field of operation, and struggling to define the professions in ESA. Moreover, work-from-home protocols to maintain efficiency worked well in the gaming industry, and the situation with COVID-19 opened up opportunities to seek more than just local talent.

Financial support for small studios, creative hubs for the talented children of new generations, and utilizing the capacity of the current studios to be mentors to talented youth, represent recommendations for the public authorities.

Tax cuts for foreign companies ready to invest in the gaming industry balanced by additionally attracting a large number of foreign studios that would open their branches here, could make a splash in the software industry itself; therefore, not only for gaming, this is also a recommendation for the public authorities.

7.8. Performing Arts

The Performing Arts sector has been the worst hit by the COVID-19 crisis. It is important to stress that in North Macedonia there was a huge difference between the public institutions in the field and the civil and private companies and organizations. The first were protected by the MoC, receiving regular salaries without any engagement for almost two years, while the independent organizations and private companies were faced with a strong negative impact from COVID-19, losing their jobs, cancelling all or most of the activities, etc. In addition, they did not receive any or received only limited support from the public authorities for mitigating the negative impact of the crisis.

COVID-19 exacerbated the already existing systemic problems in this sector (concept of national financing of culture; corruption, politicisation of the administration; the care for the few instead of care for all, etc.)

Very few organizations and individuals did adapt to the new reality and tried new concepts and models. For example, some organizations tried to use the public space in a new form or to perform for smaller audiences. The other model related to preparing the digital content and performing online. However, this led to the challenge of the monetization of the live streaming.

As in other sectors, in the performing arts sector, there is great disappointment in the public authorities, due to their ignorance and negligence before and during the COVID crisis.

7.9. Crafts

The crafts sector was affected by COVID-19 in terms of unemployment, reduced consumption of their products, and the lockdown which had a devastating impact on the handicrafts sector, losing their working spaces, etc. Most artisanal products are “non-essential” which could be the reason why their situation received very limited visibility.

The pandemic brought new opportunities for the sector. Using social media (in most cases Facebook) for digital marketing and sales enabled a rapid transformation for many of the artisans. These trends were not just responses to the crisis, but they stay on as effective means for deepening the interest in and interaction among the sector. Craft workers have had increased income during the pandemic mainly due to undeclared work and their investment in digital skills and social media advertising; otherwise, they had limited income from organized sales. However, the existing legal framework makes it impossible to operate as a crafter and hold another occupation, thus pushing these workers towards the grey economy as had been elaborated previously.

However, this subsector has also faced certain challenges. The purchasing power of the population limits the use of more expensive materials and techniques. In addition, online sales are problematic (no real online sale, ordering on Facebook and paying in cash at delivery, and difficulties in maintaining online shopping). The support from the public authorities during the COVID-19 crisis was very limited and only very few had access to it.

The sector’s biggest challenge relates to working space. Providing exhibition spaces for crafters and their work, helping in terms of building relations with tourist agencies, is an area that requires intervention and support from the public authorities.

7.10 Events Industry

The events industry is a relatively new branch; it currently does not exist as a separate sector, and encompasses culture, sports, education, entertainment, etc. During the crisis, the events industry was severely affected as all activities were cancelled. The help they received from the state was minimal and insufficient for their survival. Their biggest challenge was their classification and the legislation that would regulate this sector. As such, there is a need for deeper reforms in terms of how the events industry operates (laws and bylaws, copyright practices, stimulation of companies by tax deductions to support the events industry, etc.).

Additionally, a clear strategic orientation by the public authorities is necessary.

7.11 Marketing and design

The sector was initially hit by the crisis and the biggest challenge was uncertainty. At the beginning of the pandemic, almost all companies in this sector froze their budgets, which was reflected in the overall work, but after that, the businesses came back, and from a broader perspective, this industry has been completely restored from the COVID-19 crisis so far. This comeback came with the new digital transition, which opened up new opportunities in other markets as well. One of the challenges that this sector has been facing is the lack of talents and skilled professionals. They need people with modern skills, digital knowledge of any type related to marketing and design, but also environmentally-conscious workers. There is no educational programme in North Macedonia that would provide staff meetings the needs of this industry. Those who are qualified work for foreign companies and are better paid compared to what they could receive in North Macedonia.

The entire system in Macedonia is not set up to help this sector, starting with legislation (the Law on Labour Relations is rigid, impossibility to work abroad or from abroad), tax policy, etc. Another challenge is the underdeveloped skills in and knowledge on financial management and management in general. For example, many companies laid off large numbers of employees during COVID-19 due to the lack of these skills, and this could be managed differently. A good example is the PUBLICIST agency (<http://www.publicis-mk.com/>) that has displayed great social responsibility and ethics, demonstrating great management skills in time of crisis. None of their employees were fired or left without any care.

This sector has a huge potential to be developed. It can be competitive on the global market, attracting big companies for the cheaper labour compared to other countries, but for that to be possible, the public authorities need to create conditions, more flexible legislation, more reasonable tax policy, and a better education system for creative workers.

7.12. Visual Arts

The visual arts and visual artists were highly hit by the COVID -19 crisis, particularly given the closure of art galleries, shops and museums. Given that the sector also largely relies on exhibitions, events, and biennales, the restrictions on mobility and social gatherings brought about by the crisis had a profoundly negative effect on the market in this subsector. Specifically, this had a great effect on visual artists, who lost the possibility of income from the exhibition of their works or from the sale of their artistic goods. According to the interviews, the MoC has been considered inadequate by artists, who continue to feel abandoned and forced to live in unsustainable conditions. Only a limited number of artists, for example those who work with graphic design, achieved some benefit from the digital transition. As such, the majority of visual artists are still dependent on the galleries and do not have sufficient skills for online sales.

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ANNEXES

ANNEX I

Table: Institutions and organizations contacted as part of the fieldwork

Number	Institution/organization	Reason
1	State Statistical Office of the Republic of North Macedonia	Supplied statistical data necessary for the survey
2	Ministry of Culture of the Republic of North Macedonia	Supplied financial data necessary for the survey including data on beneficiaries of COVID-19 support instruments
3	Film Agency of the Republic of North Macedonia	Supplied financial data necessary for the survey including data on beneficiaries of COVID-19 support instruments
4	Development Bank of North Macedonia	Supplied financial data for COVID-19 support instruments utilized by CCI entities
5	State Revenue Office of the Republic of North Macedonia	Contacted for COVID-19 support instruments utilized by CCI entities but did not respond
6	Association of the Units of Local Self-Government of the Republic of North Macedonia	Contacted for COVID-19 support measures in regards to culture utilized by municipalities
7	EU Delegation in Skopje	Supplied financial data on supported projects in the field of CCI
8	Goethe Institute in Skopje	Refused to supply financial data of supported projects in the field of CCI based on data protection clauses
9	British Council in Skopje	Contacted to provide financial data of supported projects in the field of CCI but did not respond
10	UMPAKI - Union of Macedonian professional associations in the creative industries	Provided data on the members, enabled access to individuals operating in the CCI sector and disseminated the survey to their members
11	Chamber of Certified Architects and Certified Engineers of Macedonia	Disseminated the survey to their members
12	Faculty of Architecture, University Ss. Cyril and Methodius, Skopje, North Macedonia	Disseminated the survey to their members
13	Association of Architects of Macedonia	Disseminated the survey to their members
14	EVENT - Skopje, North Macedonia	Provided data on their members, provided data on their field of operation and disseminated the survey to their members
15	Association 'Muzika Sega' - Skopje, North Macedonia	Disseminated the survey to their members

Table: Collaborators who catalyzed the fieldwork

Number	Name and surname	Institution/organisation	Position
1	Nade Pesheva	Ministry of Culture of the Republic of North Macedonia	Contact point for the survey
2	Elena Bojadjieva-Cvetkovska	UMPAKI - Union of Macedonian professional associations in the creative industries	President
3	Kristinka Radevski	Chamber of Certified Architects and Certified Engineers of Macedonia	President
4	Ognen Marina	Faculty of Architecture, University Ss. Cyril and Methodius, Skopje, North Macedonia	Dean
5	Bojan Karanakov	Faculty of Architecture, University Ss. Cyril and Methodius, Skopje, North Macedonia	Professor
6	Mishko Ralev	Association of Architects of Macedonia	President and Professor at School of Architecture and Design University American College Skopje, North Macedonia
7	Trajko Simonovski	Association 'Muzika Sega' - Skopje, North Macedonia	President
8	Maja Babikj	EVENT - Skopje, North Macedonia	President
9	Olga Rajcich	Challenger - Skopje, North Macedonia	Initiator/team member
10	Dafina Dzeparovska	Ministry of Culture of the Republic of North Macedonia	Head of Department
11	Biljana Filipovska Lunga	Film Agency of the Republic of North Macedonia	Officer for international cooperation, documentation and strategic planning
12	Biljana Tanurovska-Kjulavkovski	Lokomotiva -Center for new initiatives, Skopje, North Macedonia	Director
13	Angelika Apsis	Museum of Contemporary Art, North Macedonia	Project manager
14	Gala Naseva	Museum of Contemporary Art, North Macedonia	Artist
15	Pavle Gacov	Pro Agens, Skopje, North Macedonia	
16	Ana Kardula	Ministry of Culture of the Republic of North Macedonia	Officer for access to public information
17	Marja Zafirovska	Ministry of Culture of the Republic of North Macedonia	Public relations Officer
18	Aleksandar Dobrevski	Film Agency of the Republic of North Macedonia	Officer for access to public information
19	Toshe Filipovski	/	Producer, publisher

ANNEX II

The amount distributed to the CCI, through the budget of the MoC for projects of national interest, per each subsector for 2018, 2019, 2020 and 2021

Supported projects of national interest in 2018 (in MKD)

Sector	National and local public cultural institutions	CSOs, associations and business entities	Individuals	Folklore associations	Other state actors	Academia
Dramatic arts	76,260,000.00	10,850,000.00	1,675,000.00	/	/	750,000.00
Museums and protection of tangible and audiovisual heritage	23,631,000.00	6,590,000.00	120,000.00	/	4,000,300.00	1,001,320.00
Visual arts, Design and Architecture	9,865,152.00	7,210,000.00	2,215,000.00	/	/	620,000.00
Libraries	11,762,894.00	80,000.00	8,000.00	/	/	/
Literature and Publishing	10,421,460.00	47,405,000.00	8,788,000.00	/	250,000.00	4,350,000.00
Music and Musical	32,080,300.00	40,462,400.00	8,903,300.00	/	1,700,000.00	1,180,000.00
Performing Arts Folklore	6,497,000.00	1,224,310.00	1,300,000.00	10,390,000.00	2,300,900.00	65,000.00
Interdisciplinary, multidisciplinary and trans-disciplinary projects and new models of culture	/	19,640,100.00	2,787,100.00	/	3,949,000.00	/
International cooperation	22,195,500.00	7,083,989.00	8,915,000.00	8,741,000.00	502,300.00	1,005,000.00
Cultural heritage	20,280,000.00	680,000.00	100,000.00	/	200,000.00	400,000.00
Protection of audiovisual heritage	1,960,000.00	/	/	/	/	/
TOTAL	214,953,306.00	141,225,799.00	34,811,400.00	19,131,000.00	12,902,500.00	9,371,320.00

Source: Ministry of Culture (2018) Godishna progama na Ministerstvoto za kultura i rezultati od godishniot konkurs za proekti od nacionalen interes vo kulturata za 2018 godina (Annual program of the Ministry of Culture and results of the annual competition for projects of national interest in culture for 2018). Retrieved on 06.03.2022 from <http://arhiva.kultura.gov.mk/index.php/odnosi-so-javnost/soopstenija/3536--2018>

Table: Funds for international cooperation based on the Programme for projects of national interest, 2018 (in MKD)

Sector	National institutions	Other cultural operators (state and non-state including individuals)
Multilateral cooperation and UNESCO		
Literature and Publishing	/	561,000.00
Theatres	340,000.00	71,900.00
Music and Musical Performing Arts and Folklore	410,000.00	2,944,200.00
Visual arts, Design and Architecture	700,000.00	482,343.00
Protection of cultural heritage	400,000.00	526,060.00
Protection of audiovisual heritage	214,000.00	/
Libraries	347,700.00	/
Museums and protection of intangible cultural heritage	995,000.00	412,256.00
Interdisciplinary projects	/	717,700.00
Bilateral cooperation		
Literature and Publishing	/	146,000.00
Theatres	11,529,000.00	554,000.00
Music and Musical Performing Arts, and Folklore	5,067,000.00	11,679,790.00
Visual arts, Design and Architecture	274,000.00	1,989,000.00
Protection of cultural heritage	830,000.00	102,000.00
Protection of audiovisual heritage	90,000.00	/
Libraries	155,000.00	50,000.00
Museums	723,000.00	75,000.00
Other		
Residencies	/	458,000.00
Interdisciplinary projects	/	800,000.00
Cultural centers abroad	/	4,798,840.00
TOTAL	22,074,700.00	26,368,089.00

Source: Ministry of Culture (2018) Godishna progama na Ministerstvoto za kultura i rezultati od godishniot konkurs za proekti od nacionalen interes vo kulturata za 2018 godina (Annual program of the Ministry of Culture and results of the annual competition for projects of national interest in culture for 2018). Retrieved on 06.03.2022 from <http://arhiva.kultura.gov.mk/index.php/odnosi-so-javnost/soopstenija/3536--2018>

Table: Supported projects of national interest in 2019 (in MKD)

Sector	National and local public cultural institutions	CSOs, associations and business entities	Individuals	Folklore associations	Other state actors	Academia
Dramatic arts	71,440,000.00	19,580,000.00	600,000.00	/	4,000,000.00	880,000.00
Museums and protection of tangible and audiovisual heritage	31,110,200.00	11,105,000.00	1,320,000.00	/	2,590,000.00	3,530,000.00
Visual arts, Design and Architecture	11,579,000.00	9,521,000.00	5,337,000.00	/	941,500.00	525,000.00
Libraries	13,066,583.00	410,000.00	20,000.00	/	/	/
Literature and Publishing	12,978,519.00	50,642,229.00	16,327,210.00	/	200,000.00	4,860,981.00
Music and Musical Performing Arts	79,403,000.00	42,855,000.00	5,705,000.00	/	3,195,000.00	300,000.00
Folklore	18,395,000.00	250,000.00	1,380,000.00	15,470,000.00	1,100,000.00	60,000.00
Interdisciplinary projects	150,000.00	27,635,000.00	2,600,000.00	/	1,610,000.00	600,000.00
International cooperation	20,946,100.00*	14,130,680.00	6,780,794.00	3,317,500.00	891,420.00	2,620,000.00
Cultural heritage	61,650,666.00	/	/	/	/	/
Protection of immovable cultural heritage and audiovisual heritage	/	1,475,000.00	470,000.00	/	238,000.00	500,000.00
European integration of public institutions	1,013,810.00	/	/	/	/	/
Fees and events organized by MoC in 2019	17,468,000.00	/	/	/	/	/
TOTAL	339,200,878.00	177,603,909.00	40,540,004.00	18,787,500.00	14,765,920.00	13,875,981.00

*Note: Amount of 522.400 MKD from local institutions is represented in the column for National and local public institutions.

Source: Ministry of Culture (2019) Soopshtenie za Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2019 godina (Announcement of the results of the Annual competitions for support of projects of national interest in culture for 2019).

Retrieved on 06.03.2022 from: [LINK](#)

Table: Funds for international cooperation based on the Programme for projects of national interest, 2019 (in MKD)

Sector	National institutions	Other cultural operators (state and non state including individuals)
Multilateral cooperation and UNESCO		
Literature and Publishing	309,700.00	1,682,000.00
Theatres	343,000.00	1,582,791.00
Music and Musical Performing Arts	490,000.00	918,200.00
Folklore	/	137,500.00
Visual arts, Design and Architecture	150,000.00	323,580.00
Protection of immovable cultural heritage and audiovisual heritage	494,000.00	1,506,000.00
Museums and protection of intangible cultural heritage	620,000.00	502,420.00
Bilateral cooperation		
Literature and Publishing	/	4,831,000.00
Theatres	7,130,000.00	1,000,000.00
Music and Musical Performing Arts	4,040,000.00	2,915,000.00
Folklore	4,350,000.00	3,180,000.00
Visual arts, Design and Architecture	750,000.00	2,805,000.00
Protection of immovable cultural heritage and audiovisual heritage	420,000.00	417,303.00
Libraries	/	82,400.00
Museums and protection of intangible cultural heritage	1,327,000.00	360,000.00
Other		
Residencies	/	/
Interdisciplinary projects	/	2,250,000.00
Cultural cooperation with other countries	/	/
Cultural centers abroad	/	3,769,600.00
TOTAL	20,423,700.00*	28,262,794.00

*Note: Amount of 522.400 MKD from local institutions is represented in the column for Other cultural operators.

Source: Ministry of Culture (2019) Soopshenie za Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2019 godina (Announcement of the results of the Annual competitions for support of projects of national interest in culture for 2019).

Retrieved on 06.03.2022 from: [LINK](#)

Table: Supported projects of national interest in 2020 (in MKD)

Sector	National and local public cultural institutions	CSOs, associations and business entities	Individuals	Folklore associations	Other state actors	Academia	Other non-state actor
Dramatic arts	81,890,000.00	23,540,000.00	3,330,000.00	/	4,100,000.00	350,000.00	/
Museums and protection of tangible and audiovisual heritage	31,253,000.00	13,080,000.00	3,090,000.00	/	2,650,000.00	2,690,000.00	/
Visual arts, Design and Architecture	18,557,000.00	12,965,000.00	6,795,000.00	/	/	/	/
Libraries	12,983,050.00	650,000.00	/	/	/	/	/
Literature and Publishing	12,067,000.00	69,395,000.00	22,990,000.00	/	/	4,550,000.00	/
Music and Musical Performing Arts	54,120,000.00	76,005,000.00	19,545,000.00	/	3,900,000.00	/	/
Folklore	22,512,807.00	/	2,360,000.00	20,135,000.00	2,250,000.00	515,000.00	/
Interdisciplinary projects	/	33,570,000.00	1,500,000.00	/	800,000.00	/	/
International cooperation	24,882,257.00	20,512,059.00	12,031,268.00	8,390,000.00	3,961,273.00	2,740,000.00	/
Cultural heritage	82,454,769.00	1,630,000.00	310,000.00	/	235,000.00	620,000.00	500,000.00
Projects related to European integration	15,000,000.00	/	/	/	/	/	/
Capital investment and operation	4,600,272.00	/	/	/	/	/	/
Building new infrastructure, reconstruction, repair and adaptation	91,011,944.00	/	/	/	/	/	/
TOTAL	451,332,099.00	251,347,059.00	71,951,268.00	28,525,000.00	17,896,273.00	11,465,000.00	500,000.00

Source: Ministry of Culture (2020) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2020 godina (Results of the Annual call for financing projects of national interest in culture for 2020). Retrieved on 06.03.2022 from: [LINK](#)
Data provided by the Ministry of Culture based on Request for public information No. 03-24.

Table: Funds for international cooperation based on the Programme for projects of national interest, 2020 (in MKD)

Sector	National institutions	Other cultural operators (state and non-state including individuals)
Bilateral cooperation		
Literature and Publishing (including Libraries)	653,100.00	2,113,930.00
Theatres	9,419,092.00	545,738.00
Music and Musical Performing Arts	6,230,065.00	8,354,400.00
Folklore	3,050,000.00	8,650,000.00
Visual arts, Design and Architecture	1,370,000.00	3,555,000.00
Protection of immovable cultural heritage and audiovisual heritage	481,000.00	260,000.00
Museums and protection of intangible cultural heritage	245,000.00	940,000.00
Residencies	/	560,000.00
Interdisciplinary projects	/	4,650,000.00
Cultural cooperation with EU	/	1,500,000.00
Multilateral cooperation and UNESCO		
Literature and Publishing (including Libraries)	418,700.00	1,970,000.00
Theatres	/	99,000.00
Music and Musical Performing Arts	850,000.00	883,179.00
Folklore	/	67,500.00
Visual arts, Design and Architecture	600,000.00	818,580.00
Protection of immovable cultural heritage and audiovisual heritage	895,300.00	1,485,500.00
Museums and protection of intangible cultural heritage	400,000.00	410,773.00
Interdisciplinary projects	/	3,330,000.00
Other		
Cultural cooperation with other countries	/	790,000.00
Cultural centers abroad	270,000.00	6,651,000.00
TOTAL	24,882,257.00	47,634,600.00

Source: Ministry of Culture (2020) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2020 godina (Results of the Annual call for financing projects of national interest in culture for 2020). Retrieved on 06.03.2022 from: [LINK](#)

Table: Supported projects of national interest in 2021 (in MKD)

Sector	National and local public cultural institutions	CSOs, associations and business entities	Individuals	Festivals	Folklore associations	Other state actors	Academia
Dramatic arts	54,646,140.00	12,373,011.00	5,998,300.00	13,600,000.00	/	/	/
Museums and protection of tangible and audiovisual heritage	30,686,750.00	8,405,000.00	2,410,000.00	/	/	1,710,000.00	/
Visual arts, Design and Architecture	19,017,690.00	7,668,700.00	5,230,100.00	/	/	/	530,700.00
Libraries	12,560,150.00	321,000.00	/	/	/	/	300,000.00
Literature and Publishing	10,484,047.00	48,123,250.00	9,156,930.00	700,000.00	/	350,000.00	3,000,132.00
Music and Musical Performing Arts	62,787,069.00	24,709,900.00	20,348,600.00	20,780,000.00	/	/	/
Folklore	14,999,000.00	7,400,000.00	3,177,000.00	7,750,000.00	6,587,000.00	/	/
Interdisciplinary projects	/	13,891,700.00	2,001,350.00	/	/	/	/
International cooperation	7,892,690.00	13,573,103.00	9,087,569.00	/	2,440,179.00	1,622,075.00	1,275,062.00
Cultural heritage	69,477,120.00	/	/	/	/	/	/
Protection of immovable cultural heritage and audiovisual heritage	/	3,307,000.00	471,000.00	/	/	/	150,000.00
Capital investment and operation	18,024,797.00	/	/	/	/	/	/
European integration of public institutions	757,025.00	/	/	/	/	/	/
Fees and events organized by MoC in 2021	/	/	/	/	/	2,970,000.00	/
TOTAL	301,332,478.00	139,772,664.00	57,880,849.00	42,830,000.00	9,027,179.00	6,652,075.00	5,255,894.00

Source: Ministry of Culture (2021) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2021 godina (Results of the Annual call for financing projects of national interest in culture for 2021). Retrieved on 06.03.2022 from: [LINK](#)

Table: Funds for international cooperation based on the Programme for projects of national interest, 2021 (in MKD)

Sector	National institutions	Other cultural operators (state and non-state including individuals)
Multilateral cooperation and UNESCO		
Literature and Publishing	228,700.00	1,259,704.00
Theatres	/	69,380.00
Music and Musical Performing Arts	333,000.00	2,086,734.00
Folklore	/	27,750.00
Visual arts, Design and Architecture	/	131,523.00
Protection of immovable cultural heritage and audiovisual heritage	554,000.00	575,280.00
Museums and protection of intangible cultural heritage	540,000.00	434,682.00
Bilateral cooperation		
Literature and Publishing	645,000.00	131,511.00
Theatres	900,000.00	1,613,790.00
Music and Musical Performing Arts	/	5,532,047.00
Folklore	3,800,000.00	2,403,000.00
Visual arts, Design and Architecture	220,000.00	2,636,410.00
Protection of immovable cultural heritage and audiovisual heritage	411,990.00	267,699.00
Museums and protection of intangible cultural heritage	260,000.00	616,530.00
Other		
Residencies	/	313,236.00
Interdisciplinary projects	/	3,940,201.00
Cultural cooperation with other countries	/	594,911.00
Cultural centers abroad	/	5,363,600.00
TOTAL	7,892,690.00	27,997,988.00

Source: Ministry of Culture (2021) Rezultati od Godishnite konkursi za finansiranje proekti od nacionalen interes vo kulturata za 2021 godina (Results of the Annual call for financing projects of national interest in culture for 2021). Retrieved on 06.03.2022 from: [LINK](#)

ANNEX III

Number of entities from the CCI sector from 2017-2020

Table: Number of entities from the CCI sector from 2017-2020

Sector	CODE OF ACTIVITY	ACTIVITY NAME	NUMBER OF ENTITIES IN 2017	NUMBER OF ENTITIES IN 2018	NUMBER OF ENTITIES IN 2019	NUMBER OF ENTITIES IN 2020
PUBLISHING	58.11	Publishing of book	74	77	93	86
	58.13	Publishing of newspapers	30	33	32	32
	58.14	Publishing of journals and periodicals	34	27	31	27
	58.19	Other publishing activities	39	39	41	43
	63.91	Activities of news agencies	13	14	12	13
	74.30	Translation and interpreting services	125	109	127	136
	47.61	Retail sale of books in specialized stores	68	64	64	57
Total			383	363	400	394
MUSEUMS, LIBRARIES AND HERITAGE	91.01	Activities of libraries and archives	23	20	21	20
	91.02	Activities of museums	26	26	26	27
	91.03	Maintenance of historical sites, buildings and similar tourist monuments	7	7	7	7
Total			56	53	54	54
MOVIE	59.11	Production activities of movies, videos and television program	173	193	209	197
	59.12	Activities followed by the production of movies, videos and television program	15	17	20	21
	59.13	Activities for distribution of movies, videos and television program	13	13	17	14
	59.14	Presentation of movies	/	/	/	/
	77.22	Rental of video cassettes and compact discs	:	:	:	:
Total			201	223	246	232

Sector	CODE OF ACTIVITY	ACTIVITY NAME	NUMBER OF ENTITIES IN 2017	NUMBER OF ENTITIES IN 2018	NUMBER OF ENTITIES IN 2019	NUMBER OF ENTITIES IN 2020
ARCHITECTURE	71.11	Architectural activities	252	265	281	284
MUSIC, VISUAL AND PERFORMING ARTS	90.01	Performing arts	80	80	101	103
	90.02	Auxiliary activities within performing arts	73	77	86	90
	90.03	Artistic creation	119	130	133	127
	90.04	Activities of cultural manifestations	92	91	98	95
	59.20	Recording and publishing of sound recordings and music	39	43	48	48
	47.63	Retail sale of music and video in specialized stores	18	19	18	17
	18.20	Duplication of recorded tracks	12	11	11	12
	85.52	Art education	27	14	15	14
Total			460	465	510	506
COMPUTER PROGRAMS AND GAMES	58.21	Publishing of computer games	4	8	6	14
	62.01	Computer programming	392	465	527	574
Total			396	473	533	588
DESIGN	74.10	Specialized design activities	93	106	130	152
PHOTOGRAPHY	74.20	Photographic activities	194	228	247	238
ELECTRONIC MEDIA	60.10	Radio program broadcasting	70	64	66	64
	60.20	Production and broadcasting of television programs	66	67	61	56
	63.12	Web site services (Internet portals)	103	107	119	122
Total			239	238	246	242
ADVERTISING AND MARKETING COMMUNICATIONS	70.21	Communication and public relations activities	16	16	17	19
	73.11	Advertising agencies	332	273	397	396
	73.12	Media presentation	32	26	29	29
Total			380	315	443	444

Sector	CODE OF ACTIVITY	ACTIVITY NAME	NUMBER OF ENTITIES IN 2017	NUMBER OF ENTITIES IN 2018	NUMBER OF ENTITIES IN 2019	NUMBER OF ENTITIES IN 2020
ARTISTIC AND TRADITIONAL CRAFTS	15.12	Production of travel and handbags, leather products and belts	12	15	19	16
	16.29	Production of other products of wood, cork, straw and sticks	106	126	136	122
	23.41	Production of ceramic household and decorative objects	8	9	8	5
	23.49	Production of other ceramic products	/	/	/	/
	32.12	Production of jewelry and related products	254	253	248	237
	32.13	Production of imitation jewelry and related products	18	29	34	26
		Total	398	432	445	406
TOTAL			3052	3161	3535	3540

Note: only if more than 3 entities are active, are shown in the MAKSTAT data operated by the State Statistical Office. Therefore, the total size of entities may differ in different data sources

: Protected data

Source: State Statistical Office, Data provided based on Request for additional information

ANNEX IV

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Table: Net wage paid per employee per CCI sector

Sector		Net wage paid per employee per CCI sector		2017		2018		2019		2020	
		January	June	January	June	January	June	January	June		
Average monthly net wage, paid in denars		22750	22808	24025	24203	24517	25205	27540	26867		
	J58 Publishing activities	24721	24084	22479	22878	24061	24657	26311	26382		
	J63 Information service activities	31035	31434	34017	32457	32380	33520	35492	34597		
	M74 Other professional, scientific and technical activities	29721	33578	30583	30387	29617	33754	35987	38113		
	G47 Retail trade, except of motor vehicles and motorcycles	19199	17707	18913	19606	19792	20230	22567	20843		
	S91 Libraries, archives, museums and other cultural activities	20279	20285	20825	20783	20995	23097	24287	24327		
	J59 Motion picture, video and TV program production, sound recording and music publishing activities	30655	30433	27930	30635	30412	30484	33344	19135		
	N77 Rental and leasing activities	27567	20448	25551	23684	25247	27051	30188	22749		
	M71 Architectural and engineering activities; technical testing and analysis	24657	25430	24290	24831	25102	25649	26610	27629		
	R90 Creative, arts and entertainment activities	22511	22329	22613	22728	22580	25652	26423	26635		
	J59 Motion picture, video and TV program production, sound recording and music publishing activities	30655	30433	27930	30635	30412	30484	33344	19135		
	G47 Retail trade, except of motor vehicles and motorcycles	19199	17707	18913	19606	19792	20230	22567	20843		
	C18 Printing and reproduction of recorded media	18351	18259	20457	20779	22234	22951	24515	24080		

Sector	Net wage paid per employee per CCI sector	2017		2018		2019		2020	
		January	June	January	June	January	June	January	June
COMPUTER PROGRAMS AND GAMES	J58 Publishing activities	24721	24084	22479	22878	24061	24657	26311	26382
	J62 Computer programming, consultancy and related activities	49530	49935	52908	56587	56664	59712	67514	65536
DESIGN	M74 Other professional, scientific and technical activities	29721	33578	30583	30387	29617	33754	35987	38113
PHOTOGRAPGY	M74 Other professional, scientific and technical activities	29721	33578	30583	30387	29617	33754	35987	38113
ELECTRONIC MEDIA	J60 Programming and broadcasting activities	24167	23412	24069	24133	24767	24949	27886	27001
	J63 Information service activities	31035	31434	34017	32457	32380	33520	35492	34597
ADVERTISING AND MARKETING COMMUNICATIONS	M70 Activities of head offices; management consultancy activities	27649	26448	26406	26799	30493	31003	40627	37268
	M73 Advertising and market research	33175	33688	33311	37158	30433	31995	33691	31359
ARTISTIC AND TRADITIONAL CRAFTS	C15 Manufacture of leather and related products	11572	12717	13743	14962	13421	15035	16650	15284
	C16 Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	14505	15145	16157	15998	17221	18014	20065	19140
	C23 Manufacture of other non-metal mineral products	25050	26542	27895	32358	26564	31290	31054	28785
	C32 Other manufacturing	19039	20480	20333	19780	21985	21768	25743	23651

Sources:

State Statistical Office of The Republic of North Macedonia (2017) Average monthly net wage paid per employee, January 2017. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2017/4.1.17.24.pdf>

State Statistical Office of The Republic of North Macedonia (2017) Average monthly net wage paid per employee, June 2017. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2017/4.1.17.65.pdf>

State Statistical Office of The Republic of North Macedonia (2018) Average monthly net wage paid per employee, January 2018. Retrieved on 06.03.2022 from <https://www.stat.gov.mk/pdf/2018/4.1.18.24.pdf>

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State Statistical Office of The Republic of North Macedonia (2020) Average monthly net wage paid per employee, January 2020. Retrieved on 06.03.2022 from https://www.stat.gov.mk/pdf/2020/4.1.20.27_mk.pdf

State Statistical Office of The Republic of North Macedonia (2020) Average monthly net wage paid per employee, June 2020. Retrieved on 06.03.2022 from https://www.stat.gov.mk/pdf/2020/4.1.20.75_mk.pdf

ANNEX V

List of interviewed experts

Interviewed experts

Number	Name and surname	Institution/organisation	Position	Sector
1	Elena Bojadzieva Cvetkovska	UMPAKI - Union of Macedonian professional associations in the creative industries	President	General, all sectors
2	Pece Taleski	OHO Citizens Association	President	Audio-visual and media industry
3	Margarita Arsova	Youth Cultural Center - Skopje	Manager of film programme	Cinema
4	Ljubomir Stefanov	/	Film director	Film industry
5	Spase Peroski	National Institution for Management of the Archaeological Site of Stobi	Manager	Cultural heritage
6	Naum Mihajlovski	Furious Avocado	Co-Founder	Gaming industry
7	Gorast Cvetkovski	Macedonian Game Development Association -MAGDA	President	Gaming industry
8	Aleksandra Dilevska Simova	PUBLICIS - marketing and design	Director	Marketing and design
9	Maja Babic	Bagi Communications	Event and Production Manager	Event management
10	Zoran Kardula	Freelance designer	/	Design
11	Trajko Simonovski	Association 'MUZIKA SEGA'	President	Recorded music
12	Marina Kostova	SKD.MK	Deputy Editor-in-Chief at SDK.MK Digital Newsroom	Press
13	Mishko Ralev	Association of Architects of Macedonia	President and Professor at School of Architecture and Design University American College Skopje, North Macedonia	Architecture
14	Bisera Kostadinovska Stojchevska ¹²¹	Ministry of Culture	Minister	Gov. institution

121 Despite the team's efforts in having the interview with the Minister of Culture, she was not able to take part in it. The team instead sent the questions, and for a longer period of time there was no answer. The cancellation occurred at the last moment.

List of focus group participants

FOCUS GROUPS PARTICIPANTS

	Performing arts	Sector
1	Marina Anastasovska	Ballet
2	Keti Donchevska Ilich	Theater
3	Petar Mladenovski	Music
4	Blagojche Penov	Music
5	Besfort Idrizi	Theater
6	Sofija Ristevska Petrushevska	Theater

	Crafts	Type of crafts
1	Biljana Avramovska	mandala jewelry
2	Ema Abazovikj Dimkovikj	handmade jewelry and home accessories
3	Slavica Trchkova	ceramics and jewelry
4	Marija Lozanoska	handmade jewelry and accessories
5	Olga Selivon	dools and crafts for fine motorics
6	Izabela Sokolovska	handmade jewelry and leader of 'Esnaf'

ANNEX VI

Ministry of Culture, Request for public information no. 03-23

1



РЕПУБЛИКА СЕВЕРНА МАКЕДОНИЈА
МИНИСТЕРСТВО ЗА КУЛТУРА

УП1 бр. 03-23
10.03 2022 год.

Скопје

Адресен знак:	_____
Рок на чување:	_____ год.
	20 _____ год.
	Потпис:

Врз основа на член 20 став (1) од Законот за слободен пристап до информации од јавен карактер („Службен весник на Република Северна Македонија“ бр. 101/2019), постапувајќи по Барањето за пристап до информации од јавен карактер поднесено од страна на лицето Катерина Мојанчевска, теренска истражувачка УП1 бр. 03-23 од 21.02.2022 година, заменикот министер за култура, го донесе следното:

РЕШЕНИЕ

за посредување по поднесено барање за слободен пристап до информации од јавен карактер

Барањето за пристап до информации од јавен карактер поднесено од страна на лицето Катерина Мојанчевска, теренска истражувачка УП1 бр. 03-23 од 21.02.2022 година (во натамошниот текст: барател на информација) до Министерството за култура **СЕ ПРИФАКА**.

Во Барањето за пристап до информации од јавен карактер поднесено од барателот на информацијата е наведено дека се планираат активности поврзани со анализа на податоци за што е потребна поддршката на Министерството за култура. Имено барателот како лидерка на истражувањето на „Културните и креативните индустрии во Северна Македонија и КОВИД-19 пандемијата“ кое го иницираше Министерството за култура преку техничката поддршка управувана од Cultural Relations Platform, а поддржано од Европската Комисија за потребите на истражувањето го бара следното:

- Финансиски податоци поврзани со вкупниот износ на средствата и број на поддржани лица преку **УРЕДБА СО ЗАКОНСКА СИЛА ЗА ФИНАНСИСКА ПОДДРШКА НА УМЕТНИЦИ И ДРУГИ ФИЗИЧКИ ЛИЦА КОИ САМОСТОЈНО ВРШАТ ДЕЈНОСТИ И ДРУГИ АКТИВНОСТИ ВО ОБЛАСТА НА КУЛТУРАТА ЗА ВРЕМЕ НА ВОНРЕДНА СОСТОЈБА** (Службен весник на РСМ бр: 139/2020 од 28.05.2020).

Барателот на информацијата побара информациите да му бидат доставени во електронска форма на електронска адреса.

Министерството за култура на електронската адреса katerina.mojanchevska@gmail.com го дава следниот одговор:

Согласно Извештајот на Комисијата за финансиска поддршка на корисници бр. 53-6650/4 од 28.09.2020 година Комисијата за финансиска поддршка формирана од Министерство за култура со

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Решение бр. 53-6650/1 од 02.06.2020 година согласно објавените услови од Јавниот повик за доделување на финансиска поддршка на уметници и други физички лица кои самостојно вршат дејности или друг вид активности во областа на културата или преку авторски или друг вид на договор се ангажирани во правно лице кое е регистрирано за вршење на дејност од областа на културата, за месеците април и мај 2020 година, објавен на веб-локацијата (<http://www.kultura.gov.mk>) на Министерството за култура на 01.06.2020 година како и доставената документација од страна на корисниците го утврди следното: ПРИФАТЕНИ се ВКУПНО 3 корисници Валентина Тодоровска од Струга - 29.000 денари, Василја Чали од Скопје - 29.000 денари, Јана Тодоровска од Скопје - 29.000 ден. ОТПРЛЕНИ се 3 корисници и ОДБИЕНИ се 15 корисници.

ОБРАЗЛОЖЕНИЕ

Лицето Катерина Мојанчевска, теренска истражувачка, поднесе Барање за пристап до информации од јавен карактер, заведено под УП1 бр. 03-23 од 21.02.2022 година, со кое ги побара следните информации во електронска форма да се достават на електронска адреса:

- Финансиски податоци поврзани со вкупниот износ на средствата и број на поддржани лица преку УРЕДБА СО ЗАКОНСКА СИЛА ЗА ФИНАНСИСКА ПОДДРШКА НА УМЕТНИЦИ И ДРУГИ ФИЗИЧКИ ЛИЦА КОИ САМОСТОЈНО ВРШАТ ДЕЈНОСТИ И ДРУГИ АКТИВНОСТИ ВО ОБЛАСТА НА КУЛТУРАТА ЗА ВРЕМЕ НА ВОНРЕДНА СОСТОЈБА (Службен весник на РСМ бр: 139/2020 од 28.05.2020).

Постапувајќи по Барањето, а во согласност со членот 20 став (1) од Законот, според кој ако информателот на информацијата позитивно одговори на барањето или ако барањето делумно или целосно го одбие, за тоа ќе донесе решение, Министерството за култура одлучи како во диспозитивот на ова Решение и на Барателот на информацијата му ги даде бараните информации содржани во диспозитивот на ова Решение.

ПРАВНА ПОУКА: Согласно членот 27 од Законот за слободен пристап до информации од јавен карактер („Службен весник на Република Северна Македонија“ бр. 101/2019), против ова Решение може да се поднесе жалба до Агенцијата за заштита на правото на слободен до информации од јавен карактер во рок од 15 дена од приемот на Решението.

Решено во Министерството за култура на ___ 2022 година, под УП1 бр. 03-23.

Подготвил: Ана Кардула, службено лице




cultural relations PLATFORM

The Cultural Relations Platform is project funded by the Partnership Instrument (Service for Foreign Policy Instruments, European Commission) launched in April 2020 to support the European Union to engage in international cultural relations within the framework of the EU strategy for international cultural relations.

The CRP follows up on the previous Cultural Diplomacy Platform, CDP (2016-2020). It provides a renewed approach based on a set of shared principles and new activities, aiming to promote and facilitate sustainable cultural exchanges, people-to-people activities, and co-creation processes between Europeans and citizens from countries all over the world.

