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POTENTIAL AND CONDITIONS FOR THE DEVELOPMENT OF THE CREATIVE SECTOR IN WARSAW

Abstract: The creative sector has become an important source used to create competitive advantages of the cities. The importance of creative industries in urban development was spotted more than a decade ago. Creative capital is perceived as an impulse and engine of urban changes, a source of new advantages and attractions. Some point out that it mainly develops in big cities, where the authorities deliberately implement measures aimed at supporting and attracting creative entities. The purpose of this study is to present the condition of the creative sector in Warsaw and the way its functioning is perceived by its representatives. It also discusses the support of city authorities for the development of the creative sector.

Key words: creative sector, creativity, Warsaw

INTRODUCTION

Already in the 1980's creativity was perceived as an important factor in the local and regional development. The creative sector became focus of researches representing different scientific domains, which analyse its functioning in the social and economic structures. Analyses also cover the approach of local authorities to the development of the creative sector, as well forms of its support. In spite of numerous studies, there is no single universal definition of creativity and the creative sector. It is also hard to unequivocally define the origin of the creative sector's concept. Back in 1983 Törnqvist coined the term *creative milieu.* He also defined the resources that have to be in place in order to refer to a given area as a creative milieu. Törnqvist argued that they involved such key features as: information which is exchanged and inter-traded; knowledge accumulated in time; as well as competence in certain activities. Putting these three features together allows the development of another one – creativity, defined as the capacity to create new forms and values (Stryjakiewicz, Męczyński, Stachowiak 2009). At the beginning of 1990's a new concept of *creative nation* appeared in Australia to describe the challenges of innovations in information technologies. The term *creative industries* became popular in Great Britain, where a Department of Culture, Media and Sport (DCMS) was established to define, among others, the activity of entities constituting the creative sector in the country. In the meantime many other countries launched studies on the functioning of the creative industries.

However, it needs pointing out that the works of R. Florida (2002, 2005) had a significant impact on the course of discussions about the meaning of creativity in the development of cities. According to R. Florida creative persons are the driving force behind economic growth, and their locations ("talent pools") develop dynamically and attract other creative individuals. The task of the local authorities should be to raise the quality of life and education, i.e. to provide citizens with access to various services, as well as with possibilities of living in an open, friendly, diversified city, full of attractions and charm. R. Florida also points out that the development of creativity in the cities is conducive to the establishment of new businesses and jobs. The source of creative capital in the cities involves creative individuals that constitute the creative class. However, the affiliation with the creative class depends more on the life-style, rather than one's profession. According to M. Baris (2003) creative class is a group of people who take advantage of their creative capacities in every aspect of their life, creating new forms and values, both tangible, as well as intangible. More and more often authors repeat after R. Florida, that cities which want to develop a competitive advantage, have to prevent the loss of creative force, implement measures to support creative individuals and use their skills to raise the city's settlement-, investment- and tourist attractiveness.

Warsaw is referred to as a city with big creative potential. Its capital nature meant that the seats of all national media, numerous scientific institutions and universities, as well as important cultural establishments were located in this city. The city authorities have also started to appreciate the significance of the creative sector. The capital has been implementing an active policy to support entrepreneurship for more than a decade now. Various programmes support businessmen who operate on the Polish market and are addressed at potential entrepreneurs who are planning to move their business here or establish a new one. What is particularly important in the context of entrepreneurship development in the city are programmes and projects addressed at persons entering the labour market or setting up their own business for the first time. University graduates, highly-qualified specialists in different areas, persons with “niche” professions and their activity constitute a potential which largely determines Warsaw’s social and economic directions of development. The scope of activity of companies operating in Warsaw is broad. It is very characteristic for the economy of a metropolitan city.

The aim of this study is to present the condition of the creative sector in Warsaw in terms of its size and structure, its location characteristics in the city space, as well as the perception of this sector’s functioning by its representatives. The article also discusses the support of city authorities for the development of the creative sector. The article was based on the results of studies carried out to the order of the Warsaw City Hall in 2010.

THE ESSENCE OF THE CREATIVE SECTOR

There is no universal definition of the creative sector. Areas constituting this sector are versatile, which makes it difficult to carry out comparative studies. The English term c*reative industries* is often used interchangeably with *cultural industries* and *experience economy*.

Many researchers follow the definition established by the British Department of Culture, Media and Sport (DCMS) in their studies. The creative sectors were defined as those that are based on individual creativity, skill and talent. They also have the potential to create wealth and jobs through generations and explorations (Flew 2004). DCMS includes the following in the creative sector: advertising, architecture, art and antiques markets, computer games, crafts, design, designer fashion, film and video, music, performing arts, publications, software, television and radio.

The most frequently used definition of the creative sector in the EU Member States is the one formulated by KEA European Affairs (Nowak 2010). According to this study the creative sector comprises: the main domains of culture (non-industrial activities), i.e. generation of non-reproducible goods and services which form the basis for the remaining areas in the sector; industries directly related to culture, i.e. measures aimed at generating cultural goods and services on a mass scale (audio-visual production, video games, radio broadcasting and television, phonography, book and press publishing houses); creative industries directly related to culture, involving projects where culture becomes a “creative” contribution to the production of goods (fashion or interior design, industrial design, architecture and advertisement).

On the other hand, the definition developed by UNCTAD focuses on the sector’s creative products. Creative industries are cycles of creation, production and distribution of goods and services that use creativity and intellectual property as primary input. They comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives (*Creative Economy...* UNCTAD 2008).

The differences in definitions of creative sectors stem from differing approaches to three issues: scale of activity (production size), "added value" (nature of the product, intellectual input) and economic conditions of the business carried out. Some companies in the creative sector are involved in mass production or distribution (films, video games, radio and TV programmes, publications), others carry out artistic, artisan activity, while the products of such activity are consumed in a specific time and specific place (e.g. artistic events). The issue of "added value" also differs. In line with some approaches, trade in antiques or cultural tourism does not fall under the category of creative activities, as it is not a new quality which is protected by copyrights (intellectual property). The issue of classifying businesses according to economic conditions is a third matter which is in a way a function of criteria and choices referring to the two first ones. Some businesses operate with support from different sources, others act according to market principles. However, the general assumption is that creative sector comprises those areas of the economy which are based on ingeniousness and original nature of activities using intellectual resources. One may therefore conclude that the definition of the creative sector adopted by DCMS is broad enough and at the same time clearly ranks activities that are directly or indirectly related to culture. According to the assumptions of the Singapore model, cultural activities are treated as cultural industries, and at the same time as a part of the creative and copyright industries. All segments of this model are strictly interdependent. Distribution, generating income stimulates the activities of creators. Innovations are generated in all segments of the model. Some stimulate the development of cultural industries (they are mostly innovations generated in those industries). An important prerequisite for a positive impact of innovations on the development of the creative sector also involves its capacity to absorb innovations from the external environment (determined by its endogenous potential) and the existence of an external environment which is conducive to innovations.

POTENTIAL OF THE CREATIVE SECTOR IN WARSAW

The basic problem with the assessment of condition of the creative sector in Warsaw involves defining the number of entities operating in this sector. The size and quality of the creative sector are both directly related to Warsaw's economic development base and the scope of exogenous functions. The number of entities in the creative sector was determined in several stages presented in Table 1. Firstly, economic entities allocated to NACE sections which are characteristic for creative activity were selected from REGON statistical business register[1]. 15 717 entities were then selected for further

[1] REGON (the National Official Business Register) – a statistical register maintained by the President of the Central Statistical Office. REGON also denotes REGON number, i.e. a 10-digit statistical number of a business entity in this register.

research as a result of preliminary verification of the business profile (based on additional information contained in REGON data base). The next phase involved a questionnaire survey covering all the selected entities. The survey concerned their activity: date of establishment, primary activity, size of the market where they sell their products/services, corporate relationships etc. In the course of the questionnaire survey it turned out that REGON register contained a lot of out-dated, erroneous or totally false data (kind of activity, address and telephone data). Representatives of many entities selected for the survey were not available under telephone numbers taken from the data base. Some refused to participate in the survey. As a result, full interviews were carried out with representatives of 3 114 entities. In this group 2 543 entities declared that they indeed were carrying out creative activity. Limited credibility of the REGON register, as well as the fact that the amount of small private businesses changes quickly (which unfortunately is not reflected in statistics) induced the researchers to estimate the population of creative companies in Warsaw. Referring the amount of creative entities identified in the study to the total amount of economic entities in the capital, it was estimated that there are 23 110 creative entities in Warsaw.

Table 1. Estimating the size of the creative industry in Warsaw

Stage	Selection	Criterion	Number of entities	Share %
Stage 1	Number of business entities in Warsaw		324 282	100
Stage 2	Selection of entities from REGON database by section	NACE* classification	35 716	11.01
Stage 3	Selection of entities to the questionnaire survey	Size, international ties, availability of address and telephone data	15 717	4.85
Stage 4	Entities which participated in the telephone survey	Interview carried out	3 114	0.96
Stage 5	Excluding non-creative entities, determining error in estimation of the size of the creative sector	Declaration of the kind of business activity actually carried out	2 543	0.78
Stage 6	Estimating the size of the creative industry taking account of error	Declaration of business activity	23,110	7.12

* Section G: 47.78.Z; Section J: 58.11.Z, 58.13.Z, 58.14.Z, 58.19.Z, 58.21.Z, 59.11.Z, 59.13.Z, 59.14.Z, 59,20.Z, 60.10.Z, 60.20.Z; Section M: 71.11.Z, 73.11.Z, 73.12.A, 73.12.B, 73.12.C, 73.12.D, 74.10.Z, 74.20.Z; Section R: 90.01.Z, 90.02.Z, 90.03.Z, 90.04.Z, 91.01.A, 91.01..B, 91.02.Z, 91.01.Z
Own study.

Entities carrying out their business activity in Warsaw represent all areas considered as creative by DCMS (Figure 1). In the structure of entities from the creative sector there is a clear majority of such areas of activity as advertising (25%), architecture (18%), traditional publishing (12%), designer

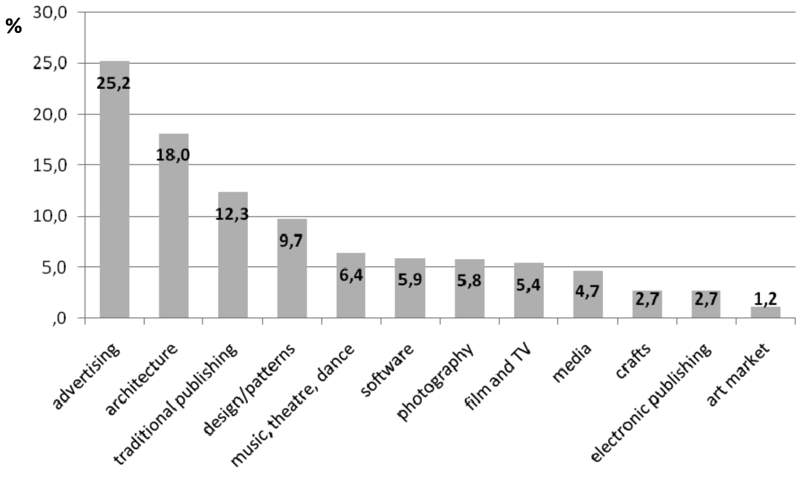

Figure 1. The structure of creative entities in Warsaw by areas of activity in 2008
Own study.

fashion and design (10%). This fact can mean that Warsaw specializes in the above mentioned fields, which has several grounds. The most important one is a phenomenon commonly referred to as the "agglomeration benefit" which involves a big outlet market in the form of citizens and businesses of the metropolitan area. Another reason behind the high share of advertising, architecture and traditional publishing in the Warsaw market involves a highly internationalized ownership structure and a relatively large amount of big companies. It is determined by the city's metropolitan nature and the availability of the market to foreign investors.

A small representation of art and electronic publishing market is caused by a relatively limited development of these areas. Crafts, which have a similar share in the creative industry as electronic publishing, are likely to undergo renaissance and rediscovery of a better quality of hand-made, individually developed products than standard ones, manufactured on a mass scale.

Based on research results it is possible to create a picture of a typical creative business: most often business activity is carried out and managed by a natural person (less often a company); the business has a Polish owner; usually it has a form of a micro-businesses; established after 2004. Small businesses which are typical for the Warsaw creative sector have limited access to financial resources, which was manifested in the qualitative research and confirmed in the studies carried out under the "Creative Metropoles" project (Grochowski, 2010). These companies base their activity on attractive and creative ideas or skills and talents of the owner. Small business size has a positive impact on flexible adjustments to the changing market. Natural persons carrying out a one-man business often outsource specialist business services to external entities. As a result, it is highly likely that there is a multiplier effect applicable to the activity of the creative sector vis-à-vis its base. Only 3.1% of all businesses have foreign capital, which shows that the internationalization of the whole creative sector is low.

The analysis also involved changes in the size of the creative sector over the period 1990-2008 and in the distribution of businesses. The biggest growth in the number of creative companies falls on the years 2006-2007. The establishment of a creative business is strictly related to the affluence level of inhabitants and the speed of economic development.

At the beginning of 1990's creative businesses were mainly set up in the central city districts (area of the following districts: Śródmieście, Mokotów, Wola). In 1990-2008 the largest growth of entities in the creative sector was recorded in Mokotów and Śródmieście district. There was also a clear increase in the number of creative businesses in Praga Południe district. It is quite possible that the reason why this district became more popular, involved measures implemented by city authorities, encouraging artists to set up their studios on the right bank of the Vistula river. This is the period when the authorities were designing a regeneration programme for the degraded housing and technical infrastructure, aimed at preserving the unique climate of the "pre-war Warsaw".

In 2010 creative sector entities concentrated in the central districts, i.e. Śródmieście, Praga Południe, as well as southern districts, i.e. Mokotów and Ursynów (Figure 2). Entities from the creative sectors do not manifest any tendencies to concentrate in specific areas. However, the preferred locations run along the most important traffic routes, i.e. Puławska St., Aleje Jerozolimskie, Grochowska St., Komisji Edukacji Narodowej St., Górczewska St., Solec St., Chełmska St., Gwiaździsta St., Mickiewicza St., Targowa St., Wilanowska St. It is difficult to identify clusters of creative entrepreneurship in Warsaw. It is possible to give examples of areas hosting several entities from the same category, e.g. a lot of entities from film industry at Chełmska Street, which is related to the fact that a film studio is located in that area.

A correlation analysis was used to define the conditions which are conducive to the development of new entities in the creative sector. Research carried out confirmed that there is a link between the number of entities in the creative sector and a total population in the districts, as well as its socio-demographic structure, employment structure, number of business entities and their ownership structure, the structure of land use and district affluence.

The creative sector has been developing dynamically in the areas with a large number of inhabitants, in particular young ones and workers from other cities. This result can be considered to be a vital voice in the discussion about the influence of persons who left their home towns and settled in the capital in search for a job on the city development. Creative entities are also more often set up in districts which are generally characterized by a high number of business entities, businesses in the private sector and a high number of persons working in the private sector. The majority of institutions

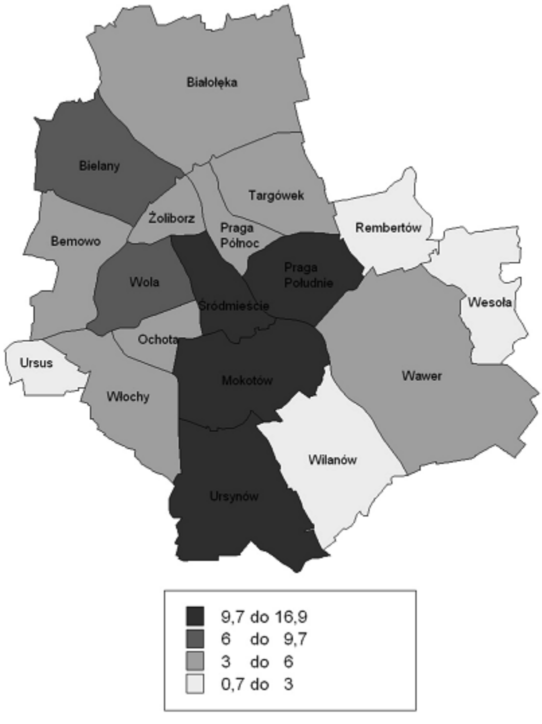

Figure 2. Share of enterprises from the creative sector in the total number of enterprises in Warsaw by districts in 2008

Own study

Table 2. Comparison of correlation coefficients in the districts by selected characteristics

Characteristics	**Value of Pearson's correlation coefficient**
Population (inhabitants)	0.899
Working-age population	0.872
Persons incoming to Warsaw	0.724
Total working population	0.771
Persons working in the market services sector	0.777
Space of urban greenery	0.909
Total number of business entities	0.957
Number of business entities in the private sector	0.958
Total revenues of districts	0.789

All correlations are significant at a level of 0.01.

Own study based on "Panorama dzielnic Warszawy 2008" Statistical Office of Warsaw.

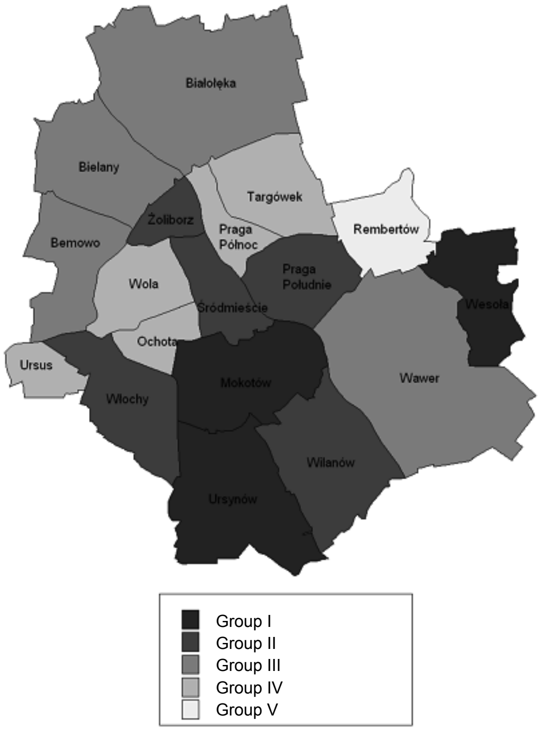

Figure 3. Development level of the creative sector in Warsaw by districts in 2008
Own study

and companies operating in Warsaw are located in the central districts, however their presence has been growing in the residential areas, particularly in the West and South-West of Warsaw. Entities from the creative sector also have a high share in this area. A vast part of these entities are small businesses which have their seats in the apartments of the owners, others are established in the vicinity of large, long-standing entities from the creative sector (i.e. film studio, seat of a TV or radio station). The relationship between the number of entities from the creative sector and the level of economic development in the districts is confirmed by another observed dependency. Creative businesses usually function in districts characterized by high income, i.e. in areas with a large concentration of business entities, offering attractive investment conditions. One can also spot increased interest of creative entities in peripheral districts with a large percentage of green areas. This is where small business entities concentrate, mainly one-man companies and representatives of land-intensive creative industries (TV stations, TV and film studios, as well as record companies).

The analyses of the creative sector's potential can be summed up using a rank method to assess the rank of a given district in terms of the development of the creative system[2]. Based on the rank analysis districts were broken down into five groups from the best developed creative entrepreneurship (group I) to the least developed (group V). (Figure 3) The group with the best developed creative entrepreneurship included: Mokotów, Ursynów and Wesoła. Rembertów district is characterized by the poorest developed entrepreneurship.

ASSESSMENT OF THE CREATIVE SECTOR'S POTENTIAL BY REPRESENTATIVES OF THE CREATIVE INDUSTRIES

In order to determine the conditions for development of the creative sector in Warsaw in-depth quality studies were carried out with representatives of companies from this sector and NGO's carrying out creative activities or representing creative milieus. The study allowed the researchers to assess attractiveness and competitiveness of Warsaw as a place for carrying out creative activity, as well as to identify locations which are particularly attractive to the creative sector.

It needs pointing out that representatives of business entities participating in the studies had serious problems with identifying what a creative sector is and determining whether they formed part of this sector. This proves that the concept of creativity itself is not well known, and the term creative sector is blurred. Study participants most often included representatives of the following industries: crafts, folk art, culture, software development, advertising, architecture, spatial planning and innovative Internet solutions. It seems interesting that some entities included all service providers (often banks) in the creative sector.

The functioning of the creative sector in Warsaw is assessed in many different ways by its representatives. The majority think that the sector's potential is large, but still remains unused. It is pointed out that the Warsaw market is highly saturated with entities from creative sector and products offered by it. A negative qualitative assessment of sector's offer can be brought down to the statement that it is hard to consider development of this offer in Warsaw as an arranged and planned process. As a result, market saturation with companies from the creative sector (and with its products) does not have any impact on the city's image, while creative products are not its characteristic factors.

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[2] This method assumes that districts, arranged on the basis of certain indicators, are ranked from 1 to 18. A relative level of development of the creative sectors in Warsaw's districts was calculated by summing up these values. Indicators: total number of creative entities per 1000 inhabitants; number of creative entities per 1000 inhabitants in working age; number of creative entities per 1000 guest workers; number of creative entities per 1000 persons employed in market services; number of entities per km^2 of urban greenery space; quotient of location of buildings constructed before 1945; number of creative entities per 1000 private creative entities; number of creative entities per PLN 100 000 income of the district budget.

Big enterprises on the other hand have a much better opinion on the functioning of the creative sector. Small businesses often point out that they do not know the size of this market in Warsaw, which is probably related to problems with identifying the industries that constitute it. NGO's, which combine creative and business knowledge, develop their own methodical systems and organize training courses on how to set up and run a business, are of key importance for the functioning of the creative sector. They are an element of business environment for creative entities. An important activity of these organizations involves representing creators and protecting their rights. Some organizations, apart from the above mentioned activity, generate creative products.

Representatives of the creative sector have contradictory opinions on Warsaw's attractiveness for their activity. However, positive opinions are in the majority. The main factors of Warsaw's attractiveness include: (i) location of the city which offers good communication possibilities with other big cities in Poland where customers are located; (ii) presence of the most important trading, marketing and tourist companies in the country; (iii) high versatility of companies on the market; (iv) presence of scientific institutions. High versatility and amount of companies on the market enables cooperation with other entities (outsourcing) on the one hand, and forms a large potential outlet market on the other. It is the only factor determining the city's attractiveness, which is mentioned by small companies. In the opinion of the creative sector's representatives the fact that authorities and bureaus of different level are concentrated in the city does not have influence on the city's attractiveness.

NGO's have a similar assessment of Warsaw attractiveness to the creative sector and point out to the same determining factors. However, they address the presence of authorities in the city and consider it one of the important assets of the capital. Moreover, they point out that city's attractiveness differs depending on the perspective of the industry. The city is particularly attractive to advertising agencies, media houses and companies involved in TV and radio production, i.e. mainly to big entities whose customers and collaborators operate largely in the capital. Warsaw is decidedly less attractive to small businesses from the sector of culture and art (e.g. photographic, crafts, industrial pattern companies), above all due to high costs of carrying out business activity.

According to Stryjakiewicz, Męczyński and Stachowiak (2009) creative activities concentrate in the cities. Urban specialists refer to those areas as the „creative spaces" or „creative districts". The districts can be characterized by unique architecture, high availability of public space, presence of cultural and leisure facilities, and recreational areas, as well as film industry.

According to representatives of the social creative sectors there are a lot of such spaces in the city. Areas which are particularly attractive for new, large investments (software production, media houses, TV production) involve peripheral districts, such as Wawer, Wesoła, Rembertów, Włochy.

Representatives of the creative sector are of the opinion that companies active in the cultural sector will have the best conditions in the Praga district. They also pointed out to areas, so far unnoticed, which would be revived thanks to the introduction of the creative activity. These include: Kabaty and Kabacki Forest areas (unused new, interesting space), Żoliborz (a district with rich history and developed social capital), as well as Powiśle (with a lot of bookstores, cafes hosting cultural events, discussion clubs, scientific and musical facilities, University of Warsaw, Library and Kopernik Scientific Centre). The respondents were of the opinion that a concentrated functioning of creative entities is important only for selected creative industries (culture, art, film), while for others such location does not play any larger role.

Warsaw's competitiveness, unlike its attractiveness, is assessed rather negatively. According to representatives of NGO's operating in the creative sector, the capital has a big potential which could be decisive for the city's competitive advantage, if used properly. Determining factors for Warsaw competitiveness involve: (i) policy of urban authorities, including flat management, but also involvement in the development and promotion of the creative products; (ii) costs of carrying out business activity; (iii) city image, including image built by the creative products.

Large entities and NGO's point out to the following cities which are competitive vis-à-vis Warsaw: Wroclaw (social environment, architecture) and Krakow (culture, high involvement of the local authorities). Additionally, they mention cities which have entrepreneurship incubators, scientific and technological parks, as well as urban programmes to support the creative industries (Gdynia, Wroclaw, Poznan, Krakow, Gliwice). It seems however, that the above assessment of big institutional entities (companies and NGO's) does not have any impact on the choice of their location. Suburban towns pose a significant threat to the position of Warsaw. Small creative entities, which mainly use the Internet for communication, are considering a change of their business location, resulting above all from by high costs of their activity in the capital (the main problem involves rent costs), as well as from the will to work closer to their domicile. Technological development of the electronic communication forms means that moving a company to a suburban zone does not have any significant influence on contacts with counterparties or clients.

FORMS OF DEVELOPMENTAL SUPPORT FOR THE CREATIVE SECTOR OFFERED BY LOCAL AUTHORITIES

In order to determine the scope and forms of support for the creative sector in Warsaw, interviews were carried out with officials representing selected organizational units in the City Hall; the available programme materials on the city development were analysed; surveys were carried out on representatives of the creative sector entities and interviews with representatives of NGO's which operate in the creative sector to find out about their opinions on the scope and forms of support for this sector.

9 bureaus of the Warsaw's City Hall were analysed to identify the instruments of support for the creative sector. The bureaus included: Architecture and Spatial Planning, Business Activity and Permits, Education, Culture, Investors Service, Flat Policy, City Promotion, City Development, Social Communication.

The bureau which was most involved in the functioning of the creative sector in Warsaw was the Bureau of Culture, also indirectly The Centre for Social Communication, as well as Investors Service Bureau. The remaining entities do not carry out any activities related to the creative sector. However, the official scope of responsibilities of the most active Culture Bureau does not include the activities mentioned above. Programmes implemented by the Investors Service Bureau are implemented within the scope of entrepreneurship and innovation support. Creativity appears in their context. The majority of activities carried out by the Culture Bureau, related to cooperation with entities from the creative sector, concerned the celebrations of the 2009 Creativity and Innovativeness Year. These activities were not continued in 2010.

It needs pointing out that the idea of creativity is not present in the strategic documents ("Development strategy for the capital city of Warsaw until 2020", "Social Strategy of Warsaw for the years 2009-2020"), and what follows, there are no provisions concerning the desired instruments of support for the creative sector. It seems that the approach to the development of the creative sector is eclectic and does not translate into systemic activities. This may result from the fact that the ideas of creativity and creative sector are new and have not yet found the right place in the city's development policy. The measures undertaken, which could be perceived as ones that support the creative sector, are of a more incidental nature and involve organizing events with the participation of the creative entities.

City authorities have planned the development of a creative district in Warsaw. „Plan for a Creative District: with Praga for Praga" is being developed by the City Hall of Warsaw within the framework of a project "Creative metropoles: Public Policies and Instruments in Support of Creative Industries" established under BaltMet Network of the Baltic Cities. The choice of Praga as the capital's creative district was not accidental. This area is characterized by a very strong concentration of cultural and leisure facilities. There are numerous activities aimed at creating an artistic image of the city. Praga is more and more often promoted among tourists.

It is planned to establish a working group by the end of 2011 to deal with the functioning of the creative sector in Warsaw. It would be a unit for cooperation with the city hall's bureaus and coordination of activities in this field. The European Funds Bureau, which supports entrepreneurship and innovations, plans to set up three new units in the city: centres of entrepreneurship, innovativeness and creativity. These units will play an informative, advisory and support role for persons interested in running a business in a specific sector. Each of the planned centres is a separate project. It is assumed that their establishment will be co-financed from the EU funds.

Another stage of studies focused on the opinions of the creative entities about the sectorial support policy implemented by the city authorities. According to the creative sector representatives the support given by city authorities is minute or unnoticeable. None of the studied companies had heard about support instruments addressed at this sector. The possibility of participating in a tender or competition organized by selected City Hall bureaus is perceived as an indirect form of support. It would be very important, if the initiatives were large and exceeded current needs of the city, serving directly the purpose of development of the creative sector and creative products, which have impact of the city's image. However, the surveyed entrepreneurs do not consider these initiatives (competitions, tenders) as a result of particular interest by the city authorities in developing the creative sector or its products.

Nevertheless, interviews revealed that entities in the creative sector do not seek any particular information on the support dedicated to this sector. This applies in particular to large institutional entities operating on the Polish national market. What is more, these entities do not really declare any particular interest in such support, pointing out how important it is to improve the business environment in general (changes and less formal nature of cooperation between the local authorities and businesses, change in the service standards applicable to big investors).

Bearing in mind the sector's specificity, one should point out to certain aspects of possible cooperation between the local authorities and entities that generate creative products, as signalized by respondents. Firstly, they point out that it is necessary for the city to create and disseminate current information about the functioning of the creative sector, its players and products generated by it. It seems that such support would be important for planning the projects, integrating them within the scope of a larger product and promoting individual creative products and their manufacturers. Secondly, entities from the creative sector declare their will to use the city's information channels to promote their creative products. This kind of support (availability of promotion carriers) could be important for the city, as products promoted in this way would influence the metropolitan product and city's image.

Entities active in the sphere of culture (also commercial ones) and NGO's ascribe high importance to the support provided by local authorities. These entities highlight their role in the development of the city's image and attractiveness, in return expecting a special support from the city authorities. The forms of support mentioned by them are of financial, material, organizational and promotional nature. In the first place entities involved in culture, as well as NGO's search for funds to finance the organization of creative events or generate creative services. Financing of training courses is also important, as in the opinion of respondents creative milieus do not have sufficient knowledge about business and law, which would allow them to function on the market.

Organizations would also like to carry out competitions in cooperation with the local authorities, aimed at identifying young creative individuals. Moreover, there is a visible interest in making urban space available for exhibitions or for the needs of performance arts, as well as in using promotional instruments and channels of the city authorities to inform about their own initiatives (e.g. about the repertoire of cinemas or theatres).

SUMMARY

It is difficult to point out to a typical development path of the creative sector and to identify its impact on the city's development. The basic problem involves the definition of this sector. The versatility of definitions and classifications of activities carried out in the sector result in the fact that different cities offer quite unique developmental conditions. A factor that largely determines development paths of the creative sector also involves the economic situation of a given country, region or city. Size of the city, its role in the national and supranational city network, as well as nature of the city's economic development base are yet another factors influencing the situation in the creative sector. Also cultural policy implemented at different levels (country, region, city) cannot be underestimated here.

Statistical information forms the basis for the assessment of the size and role of the creative sector in social and economic development. Statistics however, are not sufficiently precise and do not reflect the real actual picture. Besides, the sector is dynamic and subject to changes, also in the sense of the quality of its functioning. These changes are not reflected in statistics. Other measurement methods and tools are necessary.

The studies have revealed that there are many enterprises generating creative products in Warsaw. They are both big international firms, seats of all national media, important cultural facilities, as well as small businesses that generate products for the needs of individual consumers. This sector has been changing dynamically, and unique city characteristics contribute to its development. One can hardly talk about the functioning of "creative districts", but companies have a tendency to concentrate in specific areas, in the vicinity of the most important traffic routes. Often there are several companies representing one industry located in the same building. By all means, the development of the creative sector increases the city's competitive edge and is a factor that has influence on its settlement-, investment- and tourist attractiveness. In the opinion of the majority of studied representatives of the creative sector Warsaw is attractive to this sector, and there are areas which are particularly interesting to specific industries. The capital's competitiveness was however assessed negatively. It was pointed out that the capital has a big potential which (if used properly) can be decisive for the city's competitive advantage. It is however necessary for the city authorities to implement activities that support the development of the creative sector.

Development directions in the creative sector, as well as nature of this development are also a result of the development policies. By effecting changes in various spheres of public life, even if they do not apply directly to the creative sector, development policies are conducive to its development, generating demand for products and services of the sector. The main objective of the policy aimed at delivering development impulses to the creative sector involves stimulating economic growth by extending the base of economic development. However, this is not the only objective. Development policies addressed at the creative sector are also aimed at counteracting social exclusion, supporting human capital and developing local communities.

The authorities of Warsaw see the significance of the creative sector for the development of the city's economic base. Measures are implemented to support the creative industries. A decision was taken to establish a "creative district". It is planned to set up a Creativity Centre. Entrepreneurs who generate creative products seldom notice the activities implemented by the local authorities, which may result from the fact that the initiatives have just been launched, but they declare their readiness to participate in the programmes addressed at the sector. Experiences of many European cities prove that the right support policy for the creative sector can contribute to the improvement of city's attractiveness and competitiveness, as well as to the development of its positive and strong image.

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