

STUDY REPORT

The role of Cultural and Creative Hubs in the creative economy and its potential contributions to implementation of the 'National Strategy for the Development of Cultural Industries to 2020, vision 2030.'





INTRODUCTION

The British Council in Vietnam, with support from the European Union, is implementing a three-year project named “Cultural and Creative Hubs Vietnam” during 2018-2021.

Within the framework of this project, a national workshop was held in November 2018 on the role of Cultural and Creative Hubs (CCHs) in the creative economy and potential contributions to implementation of the ‘National Strategy for the Development of Cultural Industries to 2020, Vision 2030’. This report was produced as key material for discussion at this workshop.

This report was produced by an independent research group and encompassed the six following deliverables:

1) Review content of research recently conducted by the British Council on CCHs in Vietnam to update knowledge and information on their status in the country

2) Review content of policies, reports and publications of different stakeholders related to CCHs and the creative economy

3) Interview and discuss in detail, with independent journalist and media consultant Truong Uyen Ly, the contributions of CCHs to the creative economy

4) Advise and discuss in detail, with State management departments and agencies relevant to implementation of ‘National Strategy for the Development of Cultural Industries in Vietnam to 2020, Vision 2030’, the progress and results of implementation of missions stated in the strategy

5) Examine “focal” cases in the list of CCHs in the research “Mapping Creative Hubs Vietnam 2018” commissioned by the British Council, conducted by Truong Uyen Ly.

6) Compare the base knowledge of creative industries in other countries as well as of innovation and creative industries in Vietnam to develop initial recommendations for the growth of the Cultural and Creative Hubs in Vietnam.

The report was conducted by independent researcher Tran Vu Nguyen and research assistant Ngo Le Uyen Ly in October 2018. It is based on interviews and discussions as well as research, statistics and conclusions of comprehensive reports on Vietnam’s creative hubs by the British Council and UNESCO in collaboration with local experts and consultants.

REPORT STRUCTURE

This report on the maturity of an ecosystem of cultural and creative hubs in Vietnam is comprised of: 1) an overview of the creative economy in Vietnam, 2) an overview of the national strategy implementation process, 3) the roles of cultural and creative hubs, 4) recommendations and 5) conclusion on the search for sustainable development of cultural and creative hubs in Vietnam.

KEY FINDINGS OF THE REPORT THE MATURITY OF AN ECOSYSTEM OF CULTURAL AND CREATIVE HUBS IN VIETNAM

The key finding of this report is the development of cultural and creative hubs in Vietnam in 2018 has matured considerably compared to 2014. This trend is visible in terms of quantity and quality. Quantity-wise, this period has witnessed the emergence of new hubs and participation from stakeholders, including State organisations, international development agencies, private enterprises and individuals from a wide range of fields. Quality-wise, there has been a change from old cultural and creative hub models to newer ones, which corresponds more accurately to society’s needs as well as the quality of linkages between these hubs, creating a transference from only “listing” these hubs in 2014 to “searching for the connections in the ecosystem of cultural and creative hubs in Vietnam” (Ly, T.U, Mapping Creative Hubs in Vietnam, 2018).

The contributions of these hubs have also been recognised quite sufficiently in the reports by independent researcher Truong Uyen Ly, both in the short and long-terms. In the short-term, they have the potential to alter the appearance of a city (like Danang), a physical community (like Hanoi Creative City), or an online community (like Hanoi Grapevine). In the long-term, they can improve the reading culture of society as a whole (streets dedicated to books and publications) and develop a new generation of professional and semi-professional artists (the film centre TPD or creative training space Ty Toay in Hanoi).

This maturity in quality and quantity underlines the impacts of the “National Strategy for the Development of Cultural Industries to 2020, vision 2030” as well as the efforts of stakeholders, including the British Council in Vietnam and Vietnam National Institute of Culture and Arts Studies (VICAS). However, in reality, this document was heavily influenced by culture in the shape of public performing arts and does not accurately highlight the economic features of the cultural and



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creative industries. Overall, this strategy represents an initial effort to recognise and establish a foundation for a legal system to support creative industries and should be viewed as a general strategy, which does not fully reflect the operational systems and solutions for each creative industry.

For more practical solutions, national-level schemes for each specific industry and occupation in cultural and creative fields are necessary where cultural and creative hubs are platforms for these activities developed in consultation with expert practitioners. The links between stakeholders within the cultural and creative ecosystem can reference the development of the creative innovation entrepreneur ecosystem, which is currently witnessing incredible growth in Vietnam.



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PART I: OVERVIEW

1. DEFINITION

In Vietnam, ‘creative industry’ or creative economy is a new concept not officially used in administrative documents of the State. The concept of ‘creative hub’ is closely linked to creative industry and might be even a newer term in Vietnam.

The first likely appearance of the term “creative hubs” was in the global programme “Creative Economy” of the British Council, implemented in Vietnam in 2014. According to the programme, ‘creative hub’ was defined as “*a place, either physical or virtual, which brings creative people together. It is a convenor, providing space and support for networking, business development and community engagement within the creative, cultural and tech sectors*” (Definition of creative hub, Hubkit, British Council).

Even though the concept of ‘cultural and creative hubs’ has yet to be officially accepted and used in State administrative and legal documents, there is a growing awareness of creative hubs and the creative economy in Vietnam. The mass media has started to use this term to describe places of cultural and creative activities.

2. GLOBAL CONTEXT

The development and operation of CCHs is a relatively new concept internationally, with most hubs being established from the early 2000s.

The main feature of creative hubs in European countries is their tight connection to the actual current state of the local society, culture, and economy, reflecting the creative communities of which they are a part (Andy Pratt., 2017). According to Professor Pratt's report (2017), the majority of creative hubs in Europe were sponsored by governments. In these countries, in addition to establishing and providing direct investments, governments are also interested in the planning and distribution of workspaces and studios for artists and creative hubs.

In Vietnam, there is a contrasting picture with limited State investment, participation and support for creative hubs. These roles are mostly fulfilled by foreign non-governmental organisations (NGOs), individuals living abroad, persons working in the real estate field or even individuals working in cultural and creative fields themselves. Due to these core differences, a degree of caution is needed when applying the application of lessons learnt or prominent models from one environment to another.

3. VIETNAMESE CONTEXT

In the 1990s or early 2000s, many hubs and events focused on new art creations and experimentations were funded by cultural organisations like the British Council, French Cultural Centre, Ford Foundation and Goethe Institute. This context is changing, and the hubs are becoming more independent (Ly, T. U., 2014). Currently, most CCHs operate independently and many were founded, operated or led by individual artists or art and creative practitioners. Some creative hubs, such as Life Art/Black Box (operating as a social enterprise) are partly reliant on funding from NGOs for certain theatre projects, while most courses are funded with Life Arts’ budgets and contributions from participants and young volunteers.

Other hubs operate independently with 100% funding from Vietnamese owners, such as Manzi Art Space and Café as well as Heritage Space in Hanoi and 3A Station in Ho Chi Minh City (please refer to reports conducted in 2014 and 2018 by journalist and media consultant Truong Uyen Ly).

Creative hubs in Vietnam and their communities are growing at a great speed within a strong movement. According to reports by Truong Uyen Ly (2014, 2018), from 40 hubs identified in 2014, this number has risen to more than 140 in 2018, with a total of two million “likes” across their social media. However, this number reflects the scale of audience engaging with hubs, not hubs’ income. This needs to be explored further to gain more information about the development of a database as a foundation that would orientate deeply influential policies. Compared to 2014, hubs are also more diverse field-wise and more widely spread geographically.

Another notable feature of CCHs in Vietnam mentioned in most reports is their diversity. These hubs are not limited to physical or virtual spaces. They can be collectives/groups or a programme/festival of a flexible nature, not fixed to any particular place, but instead regularly renting or borrowing spaces to host events depending on the topics and conditions. Some creative hubs that can be transferred from one place to another include the Empathy Museum, Gieo Project, Ginger-work, Quest Festival, The Onion Cellar and Ve Ke Chuyen.

This report’s researchers determined it would be an overly challenging task to provide a short, yet comprehensive and detailed portrayal of CCHs in Vietnam due to the complex and diverse nature of the creative context. Each hub is an independent organisation that is unique in its own field, with many distinctive features and platforms (personality of the founders, time, place, how the hub was founded, income sources, operational scales and participant community).

The diversity in functions, topics and operation styles of each hub along with its uniqueness and special features make it challenging to clearly categorise and define these creative hubs. They can be a co-working office that connects people of common interests (Up, The Start Centre, Work Saigon), or a training centre (ADC Academy), an investment fund doubled as co-working space (Saigon Co-working, Danang Co-working Space), a place for new creative ideas (Saigon Outcast, Hanoi Rock City), an online forum providing cultural and creative information (All about Art and Artist, Soi, Hanoi Grapevine), or a place for gathering and sharing on topics related to creative cultures and arts for lovers of these fields (Cà phê thứ bảy - Saturday Coffee).

The main features, activities and distribution of CCHs in Vietnam also change accordingly to the spaces and local features to fit with the nature of the local cultural and art scene as well as the creative communities. According to Truong Uyen Ly's report (2018), the majority of hubs in big cities that act as socio-economic hubs (Hanoi, HCMC, Haiphong, Danang) mostly undertake activities related to contemporary art and creative services, such as a co-working space or business and technology incubator. Meanwhile, hubs in smaller central regions like Buon Me Thuot, Gia Lai, Hoa Binh and Quang Nam are more focused on the conservation of national culture and indigenous heritage, development of tourism-oriented cultural industries and nurturing of community culture.

According to the government’s departmentalisation management system (ministries manage separate departments), CCHs can be split into two main categories: Category 1: cultural and art hubs (the majority) and Category 2: hubs for other industries (game design, application development, software, technology, and especially for the start-up community and a new target group called ‘digital nomads’ - people who travel and work on internet platforms).

The most notable feature of this comprehensive picture is how connections between different stakeholders have gradually developed from the initial steps of trying to determine the existence of these hubs. This led to cross-overs and meetings between communities who preside over cultural and creative hubs and other factors, in other words the ecosystem of cultural and creative hubs in Vietnam. A special feature of this ecosystem is the Vietnam Creative Hubs Initiative, officially introduced at a workshop on August 10, 2018 and founded by VICAS Arts Studio, The Centre for Assistance and Development of Movie Talents TPD Hanoi Grapevine, Heritage Space and Danang Business Incubator DNES.

Participation through different methods of State organisations, international agencies and social organisations in this comprehensive picture of CCHs has also created many positive movements. For example, the People's Committees of Dak Lak and Dong Thap provinces lend public spaces to create creative hubs, the Israeli Embassy provides short training courses in Israel for leaders of CCHs, the Swiss Government through the Swiss Entrepreneurship Programme appoints international experts to support the operation and development of CCH communities across the country and the Asian Development Bank provides direct and indirect support through funding community development activities. Additionally, various universities have also step-by-step developed their own creative hubs either independently or in a partnership, such as Hanoi University of Science and Technology with BK-UP.

Another interesting aspect is the way CCHs have actively looked for legal models to operate spaces, such as public-private partnerships, social enterprises, joint-stock and limited liability companies or private enterprises.

A clear pattern has emerged with respect to many CCHs, where after a period of strong performance while sponsored or self-funded by founding members, they would encounter sub-optimal conditions for sustainable development and gradually disappear from the map. Examples include Toa Tau and 3A Station in Ho Chi Minh City, replaced by new hubs.



PART II: FUNCTIONS AND ROLES OF CCHS, AND THEIR CONTRIBUTIONS TO DEVELOPMENT OF A CREATIVE ECONOMY IN VIETNAM AND RELATED CHALLENGES

1. FUNCTIONS

CCHs in Vietnam consist of a variety of business models, but primarily focus and prioritise providing convenient, cost-effective working spaces or enabling individuals interested or working in creative fields to gather and network. This function is similar to the definition of a co-working space, which refers to the combination of a physical working space and a community with interactive activities. For these hubs, whether they operate as an asset management business model prioritising activity management and training, whether their aim is generating profits or just breaking even to maintain operations, the bottom line is to develop an art form, to sustain a model of culture, to act as a forum for discussion and development of creative communities/potential audiences via education and sharing. Another common function is to host exhibitions, introduce new work and organise art performances, along with selling, consulting and evaluating artwork.

CCHs are part of the social and cultural infrastructure, serving as the foundation of a creative economy. However, the precise nature of this role varies depending on local situations in which each CCH has its own function.

Firstly, CCHs act as a facilitative and encouraging environment for creative individuals or artists to operate and flourish. These hubs differ in size and scope depending on their cultural and creative communities as well as their potential audience. Moreover, the needs of practitioners may change rapidly according to specific projects. Therefore, developing a hub that is flexible, expandable in scope, functionally changeable and economically viable is a challenging problem for creative hub managers.

To solve this problem, it is essential that creative businesses are assured of their security of tenure and space availability in appropriate locations for their operations.

However, local governments and policy-makers often ignore these prerequisites and allocate creative activities to limited or impermanent spaces, sometimes forcing the businesses and hubs to reallocate as rents rise or utilise their creativity and renovate with no long-term benefits.

An interesting point lies in the interface between co-working spaces and cultural and creative hubs. With people business literate and interested in building a community as a foundation point, these co-working spaces are financially independent and somewhat "less artistic" in terms of operations compared to hubs created by actual artists.

For instance, the co-working space of Danang Business Incubator DNES - a public-private partnership business - is not just an office space and in the words of researcher Truong Uyen Ly, it has contributed to "the transformation of Danang's identity" into a creative start-up city. This hub was facetiously regarded by Mr. Pham Duc Nam Trung - DNES' Director, as "the city's international guest house" because most high-level delegations coming to Danang would visit the hub and meet its young creative community. The global president of the Asian Development Bank and the Australian Minister of Foreign Affairs and Trade even spent time to conduct discussions with 300 young people in this hub. These impressions have led to special support from international organisations and collaboration programmes of other countries for the creative innovation of Danang.

Secondly, CCHs function as a network for people in the industry and a suitable space to host collective services. This is why hub managers tend to be careful in selection of new tenants and management of existing tenants, as well as the development of workshops, training events, exhibitions and audience attraction, along with linkages with local communities and expansion of other partnerships. However, being well aware that a community is the heart and soul of a CCHs, hub operators regularly organise community activities and seek to extend outreach to more remote communities.

Another example is Gofish hub (Hoi An), established by two different founding members: Bui Cong Khanh - an installation artist and Dang Huong Giang - a social activist who pursues community-oriented education activities. Their approach is multi-dimensional, combined with different platforms/programmes to create an engaging, colourful playground for Hoi An. Particularly, in addition to guests' seminar talks such as New Year's Cultural Customs by researcher Huynh Ngoc Trang, they also host exhibitions of their and their friends' artworks so local people and tourists can visit and enjoy. Gofish has partnered with the Sustainability Field School - a service learning project (learning through community service and community-oriented activities) gathering young people from all over the country to learn about art and interact with local elders to gain different experiences. Gofish has become a "stopover" for local and foreign artists when visiting Hoi An.

Thirdly, CCHs establish connections between people with different expertise to create new products in a multi-disciplinary fashion. The Creative Lab by UP is the extended hub from the UP co-working space (Hanoi) and provides an environment for artists to meet with software engineers and entrepreneurs. These three groups together have been successful in creating innovative products that embody the three components of art, technology and economics, of which Curnon Watch is a prime example.

Established by a husband and wife artist couple, Ti Toay started as an atelier teaching children "how to play with colour" to develop different artistic skills. Eventually becoming more socially accepted (as indicated by the number of parents willing to pay for classes), this model has developed into a series of events accompanied by more collaborations with artists who act as instructors, and gradually expanded into different types of art therapy for different target groups. Ti Toay does not measure the social impact of these classes on the development of a new generation of students and artists, but it would not be insignificant.



2. ROLES

CCHs are experiencing rapid and strong growth and play an active role developing the creative ecosystem by providing a friendly, safe and interactive environment for people to network, exchange ideas and push themselves beyond their limits. These hubs have demonstrated the potential to engage and support artistic expressions as well as to offer audiences and artists the opportunities to access cultural life. Culture and art are no longer limited to serious "academic" concepts. Audiences are given greater access to cultural and artistic activities, thus fostering communities through public events. These hubs establish the connection between creative practitioners and those who are interested in or are utilising creativity, including the government.

A formal discussion with researcher Le Quoc Vinh - communications expert, chairman of Vietnam Creative Entrepreneurs Club, revealed these creative hubs have portrayed "for the community, managers and relevant parties a more comprehensive picture of the overview and prospects of the creative industries".

In addition to creating jobs, one of the prominent contributions of CCHs is improving the cultural value, branding and identity of cities in domestic and international markets.

Regarding this role, in an interview with journalist and media consultant Truong Uyen Ly who has conducted numerous reports on CCHs, she stated that "a case in point is Zone 9, founded in 2011. Prior to Zone 9, the building was just an old, abandoned structure. Since the introduction of Zone 9, it became the home to 60 businesses, generating more than 1,000 jobs. Each event attracted thousands of young people. Station 3A is another example. Previously, the area was only occupied by restaurants with nothing outstanding or memorable. Station 3A, however, transformed into a cluster of shops and galleries showcasing Vietnamese products and designs, making it a destination for young people, artists, and tourists. The impact of this cluster of hubs may be described as "a makeover" in terms of appearance. In terms of value, there has been an incredible boost as 3A Ton Duc Thang is no longer the address of some fish shops, but a complex and refined combination of values, selling more products bearing "made in Vietnam" labels. The hubs thereby bring prestige and create a "brand" not only for the place, but the city as a whole. Similarly Danang, with DNES and other emerging creative hubs, has become the region's new destination for creative entrepreneurship, no longer just a generic prosperous tourist city in central Vietnam.

The idea of a hub that fosters, promotes and connects creativity has captured the attention of more and more people. This has solidified the growing network of creative practitioners and those who run creative businesses as well as substantially contributed to the overall development of society.

In report by journalist Truong Uyen Ly in 2014, the majority of creative hub founders fell between the ages of

20-50. Jason Khai Hoang, co-founder of Saigon Hub, is in his early 20s. Three of the four founders of HATCH! were under 25 years old. One of the founders of Saigon Co-working had not reached the age of 25. This generation has benefited from the rapid development of the internet and global connectivity platforms as cultures are imported and exported into and from Vietnam. This has been a great opportunity for them to learn about new cultures and the boundless creativity of the world. Their confidence and passion have become a source of inspiration that encourages many other young people to pursue their dreams, to actualise their artistic and business ideas with more confidence and less dependency on their parents or any other source of support.

Hanoi Grapevine is an online portal disseminating information and art commentary to support independent artist communities in reaching out to the wider public, whereas the many book street projects of Le Media Group have gradually developed a reading culture and common, public cultural hubs for society. These roles have slowly been recognised by society and government as joint efforts to increase the overall cultural content of the country.



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The research team noted numerous promotion efforts by virtual hubs for events (Heritage Space, VICAS Arts Studio, San Art) to solicit audience participation in such activities, thus encouraging and energising artists. They also utilised personal connections and reputable art evaluators to promote the domestic art market where young artists are able to sell more work, leading to a significant increase in their market and artistic values. Originally lacking budget and operating personnel, VICAS Arts Studio has literally "survived" on finding competent young artists, evaluating paintings and becoming an intermediary for introducing this work to the public and to local and foreign collectors. On average, it hosts one exhibition per month with one-fifth of paintings on display sold. Particularly, there are exhibitions where one-third of paintings were purchased by a wide variety of buyers, including local and foreign collectors (source: VICAS Arts Studio). It also relies on international networks to organise sessions to share experiences and lessons learnt as well as joint performances by local and international artists. This is something official State-run institutions have not generally paid adequate attention to or are not interested in as it



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requires financial and human resources. Makerspaces like Fablab or Creative Lab by UP facilitate experimenting "makers" with spaces, tools and equipment not often provided by schools in the current formal education system, including polytechnic universities.

VICAS Arts Studio statistics revealed its audience was nearly 10,000 people within one year of operation, with nearly 2,000 followers and an average attendance of 80-150 people per opening event (exhibition, art performance). Interestingly, visitors were not only connoisseurs, but also students and from various associations. This has gradually changed the concept of culture and art "appreciation", occasionally still considered "elitist" and only for "appreciative" people or those that are economically stable. Current CCHs are open to all audiences, transforming perceptions as well as engaging participation along with the community to create programmes and ideas practical and close to the heart, giving voice to the community.

Vietnam is also witnessing an exciting new development, the boom in start-ups, leading to increased co-working spaces, promotion and support for these start-ups. Such hubs assist start-ups in finding solutions to their business projects and sustaining funding resources through providing accounting and management services, as well as consultations on marketing, branding and investment. Start-up activities are the most positive sign for creative industries in Vietnam and are considered by the government as an economic driver, an important foundation leading towards Industry 4.0.

If the contributions of CCHs are positioned in the national strategy for development of cultural industries, it can be assumed the "bottom up" development approach of the community is guiding the "top down" policies of the government.

PART III: CHALLENGES AND SUSTAINABILITY

1. CHALLENGES

a) The primary challenge for creative hubs is **building trust and understanding between State leaders, local authorities and creative hubs**. Cultural and creative hub is a new field experiencing rapid change and growth. Due to the lack of knowledge and reliable updates of information and data, assessment of situations is likely to be based on outdated knowledge and lag behind reality. As a result, it is highly difficult to create a policy-making process that will yield successful results, long-term value and quick impacts. Politicians, policy-makers and individuals working in this field and the public now face a challenge to thoroughly understand the creative economy and its potential.



classification, there are several inconsistencies that make them unfit to be applied on creative economies. On one hand, it results in some activities **to be uncategorisable as they fall in gaps between** the statistical or conceptual categories, while on the other hand inappropriate categorisation **will cause inadequate and inappropriate policy support for the activities** (Pratt, 2017). Policy-makers and politicians should take note of these risks and their impacts, or else risk the emergence of seemingly common and simple problems in the process of supporting and promoting changes in industrial or cultural policies (Pratt, 2017).

As creative hubs are still quite new in Vietnam, there is no specific legal status designated for them. The law requires all hubs to register their business activities and pay tax in accordance with their duties. Creative hubs, as a result, have to juggle their survival and pursuits – developing a creative community. Many hubs encounter difficulties in fulfilling the responsibilities of an enterprise and a community, and they often have to take on different labels to fit roles depending on the contexts. Under the tax system and Enterprise Law, they can be a “household business”, “limited liability company” or “joint-stock company”. Meanwhile, they promote themselves to communities as non-profit organisations, education organisations, artist collectives, co-working spaces or simply “creative hubs”. It is not an easy task for these hubs to perform several roles simultaneously.

Firstly, these hubs are all small enterprises. Currently, it is impossible to compete with State-owned companies to obtain Government investment. Secondly, creative hubs must pay tax like other enterprise models, yet not all creative hubs are profit-oriented and since some hubs are still new to the market, it is difficult to make profit with limited customers and providers. Thirdly, with an enterprise identity a hub can be restricted in its operation. Creative enterprises, for instance, tend to register services (such as a coffee house) as their main operation to obtain a business license (and host cultural activities as extra or temporary activities). This is not the originally stated legal purpose nor is it the main objective of the enterprises. The creative economy, therefore, is constrained. A typical example of this problem is Cà phê thứ Bảy (Saturday Coffee).

In addition, according to Professor Andy Pratt in his 2017 report, another aspect of public acceptability of contemporary arts is the State’s recognition or Government promotion and support in the form of awards given to art forms and professional artists. This recognition is highly important yet might still result in several limitations that hinder

This challenge involves **identifying the creative economy**. Many policy-makers believe that current industrial and cultural policies are adequate. While it is true that the creative economy corresponds to some aspects of Government industrial and cultural policies as well as researchers’

the consideration and acceptance of new art forms. Many fields within the craft industry have received this type of recognition. It is still a challenge for creative industries to be recognised, despite this being a factor that directly impacts the development of artistic activities and creative hubs.

Such impacts vary in level and scope depending on different regions and their local conditions, resources and creative economy development background. As reported by journalist Truong Uyen Ly, in places with poor economic conditions and limited access to resources, recognition such as an award can be life-changing. Y Thai E Ban from the Ede ethnic group in Ban Me Thuot, for example, was awarded first prize in the city’s sculpture contest and subsequently became well-known, which earned him substantially more income than as a small-scale coffee farmer. Meanwhile, in big cities like Hanoi or Ho Chi Minh City where resources are more diverse and concentrated, many awards/recognitions with limited media promotion are ineffective in persuading and capturing an audience/customer. For example, for an artist with paintings displayed in local and international art galleries, a casual bystander would not know which galleries demonstrated the artist’s ability without media promotion or communications.



b) One of the biggest challenges for CCHs as stated in all reviewed reports is entirely subjective and uncertain - **censorship and licensing processes for event organization**, which often largely depend on personal connections. While this process might benefit certain creative hubs, it is a major obstacle for the majority. While co-working spaces, incubators and information and technology hubs do not regard such procedures as an issue, cultural and art hubs consider it their biggest dilemma.

According to the 2018 report by Truong Uyen Ly, seven out of 10 cultural and art hubs surveyed for her research reported difficulties with the licensing and censorship process. She believed relevant issues included permit application times, the “sensitive” nature of the artwork, the “controversial” profile of the artist and whether or not the project contained “foreign factors”.

Normally, creative hubs organise a wide range of events to create networks and connections. Events are an integral part of these hubs. Therefore, event licensing and censorship is one of the most impactful tasks, its role not unlike oxygen to the survival of creative hubs. As noted by enterprises, the legal framework for cultural and creative enterprises is still too complex and inconsistent. The application submission and processing procedure by authorities may vary from hub-to-hub and case-to-case depending on numerous factors, such as type of creative hub, field and place of operation, profile of hub owner(s), relationship of hub owner(s) with local authorities and personal opinions of the individual in charge of processing applications. Especially with applications for work of an experimental nature, this newness seems to always encounter uncertainty.

Many important concepts used in the evaluation and decision-making process are not mentioned in law or are without a clear definition, resulting in subjective interpretations. Decisive concepts such as “internal” and “public” are not well defined, which leads to different interpretations of the law between applicants and regulators.

Truong Uyen Ly noted this challenge in her 2014 report through the comments of Saigon Outcast’s founder Doan Phuong Ha, who mentioned the permit application process for cultural events was costly and time-consuming. It was also complicated due to inconsistent guidance from authorities which caused confusion over how to complete the process. An event would require submission of a significant amount of paperwork and different procedures, with “grease money” often required to complete the process.

"In the eyes of cultural regulators, culture is regarded as a field of ideology instead of a product for the market. This is the reason why they are more cautious with events organised by creative hubs," said Le Quoc Vinh, media expert, President of Vietnam Creative Entrepreneurs Club.

In addition, uncertainties and delays have created a "self-censorship" mechanism for CCHs, drawn from repeated experiences of applying for permits or experiencing censorship. This directly limits the creativity and motivation of creative hubs and the creative spirit.

c) Issues related to tax incentives and investment
In Vietnam, there is no specific incentive policy to support or promote creative enterprises and hubs like in Europe. Therefore, innovation activities of the creative economy are dependent on other funding sources. However, the involvement of foreign investors is still a sensitive issue. Government agencies are concerned about the impacts and control of foreign investors on the creative economy's activities. This greatly hinders foreign NGOs or international private organisations who want to engage in ideology-related activities. Although foreign funding and support is still legally allowed, delays and uncertainties in licensing remain a big obstacle.

d) Issues related to the type of business
As there is no specific legal document defining the legal status of CCHs' activities, each CCH manages itself with a different type of license. Co-working oriented hubs often follow a real estate business model, which simplifies their office rental issues. For enterprises that do not meet the minimum capital requirement (VND 20 billion) to register as a real estate business, renting their space to other creative enterprise can be contractually difficult and therefore they usually adapt their business in different ways, such as a restaurant or event business.

TPD and the shift in business model

TPD is a non-profit film organisation that supports development of the young film industry. TPD funds short films, creates an environment for creative young film-makers, universalises audiovisual arts for the youth, and takes pride in owning the first library of classic films in Vietnam. TPD has also built a large community of young film-makers in Vietnam.

In 2013, in the absence of any funding sources, the heads of TPD Centre Bui Thac Chuyen and Nguyen Hoang Phuong took a great risk to establish the Cinema Development Joint Stock Company (CDJ) to maintain funding for TPD's operations. CDJ also received significant support from the Vietnam Cinema Association. After shifting its business model, TPD developed a community of 2,500 professional and amateur film-makers, produced more than 800 documentaries and short films, and organised 12 courses for fiction film-making and six courses for documentary film-making for 80% of participants aged 18-24. TPD students joined and received many awards from local and international film festivals, such as Autumn Meeting, Docfest, HANIFF, Vietnam Golden Kite Award, Yxineff and 48 Hour Film Project.

f) Regulations on intellectual property rights if supported by the Government and widely accepted and

carried out by the society, will be a solid development foundation. For creative industry enterprises, however, the challenge lies in understanding intellectual rights and how to transfer or retain copyrights of their assets. Subsequently, legal knowledge and consultations on complex issues related to intellectual property rights in a creative economy are essential. Intellectual property rights management still lacks essential elements, such as a rewards system, regulations and society's willingness to carry them out. Without a sound management system, it will be difficult for creative enterprises and hubs to call for investment as future income cannot be guaranteed when intellectual property rights function in an ineffective and improper manner.



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2. SUSTAINABILITY

Sustainability is the objective of all creative hubs. Young founders of creative hubs are highly focused on how to keep their "dreams" sustainable. For most creative hubs, the issue of limited resources and lack of business and management skills has always been a great challenge.

Self-reliance, funding-wise, is becoming the only choice for many creative hubs. Unlike the 1990s or 2000s when creative hubs and art projects benefited from foreign aid and support, since 2010 fewer creative hubs have received funding from foreign cultural institutes as many funding sources were cut due to the global economic crisis. At the same time, economic growth in Vietnam has enabled the development of many creative hubs, which led foreign sponsors to decide it was an appropriate time to halt funding to Vietnam. This change meant creative hubs needed to look for new survival methods. The most obvious potential solution is for the State to fulfill the role of investor and supporter of the creative economy. However, considering the current licensing mechanism and administration, this would be challenging to implement. Most creative hubs founded since 2010 are financially self-reliant. Some non-profit hubs rely on funding or voluntary contributions (CUCA, Doclab, Dom Dom, Ga 0 (Zero Station), Nha San Studio, TPD and Together Higher). A few other hubs are partly business-oriented (CAMA ATK, Hanoi Rock City, Heritage Space, Life Art, The Onion Cellar and 3A Station), and many centres are self-funded (Hanoi Design Centre, HubIT, Hatch!, Work Room Four and 5Desire). But the question of sustainability still remains: How long can they continue this way and which skills and business models do they require to self-sustain their existence?

Many creative hubs started out as a dream of an individual or small group, such as Hanoi Rock City, Manzi and Saigon Outcast. Most founders gained experience from implementation. However, compared to people formally trained in these skills, it is likely these founders have paid a much steeper price in terms of time and efforts.

"It is necessary to develop a generation of art managers with experience in artwork business and administration tasks, including requesting a license and working with relevant authorities in the field of art. It is necessary to know how to work with different people, to acquire the skill of assessing and curating as well as describing and explaining artworks. Art managers need to possess a variety of skills to change the art environment in Vietnam and help the art field to develop in the right direction" (Do Thi Tuyet Mai, 3A Station, Ly. T.U (2014)).

"During the research process, I found that many hubs "died" due to a few reasons, from high rent to government interference, which greatly discourages the hubs' owners. But the main internal reason is whether or not the leaders are insistent enough to follow and adapt to the outside conditions. Regarding external causes, the most significant one is the need of the market. Vietnam has to be at a certain period of economic development and there has to be international connections for the CCHs to emerge. All of this arises from the market's demands. In the end, Vietnam's context shows that



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State actions and laws are usually behind the reality of development. CCHs are mainly formed from internal forces and the laws of the market. (journalist Truong Uyen Ly).

Professor Andy Pratt (2017) mentioned in his research that cultural and creative enterprises and hubs were not sustainable as they were established based on needs identified as too rigid and short-term. The establishment of a creative hub was the same as forming a 'foundation', development of an institute and its connection to society, law-makers and the wider creative community.

Pratt (2017) believed that one of the notable features of research on creative hubs in Europe was exemplary case studies on the role of management in hubs operating successfully and its translation into a specific and important skill set, requiring a combination of art and cultural skills with economic and management skills as well as the ability to connect with politicians, law-makers, funding agencies and the public. In the UK, creative hubs have been operating for more than 25 years and are able to independently train their management staff. This skills requirement could be a challenge in Vietnam once creative hubs experience stronger growth. Therefore, training, consultation and support for management staff of creative hubs is and will be an essential demand.

PART IV:

LEGAL FRAMEWORK

AND OVERVIEW OF IMPLEMENTATION OF THE NATIONAL STRATEGY FOR DEVELOPMENT OF CULTURAL INDUSTRIES IN VIETNAM TO 2020, VISION 2030

The notion of culture as part of the economy was first reflected in guidelines of the Communist Party of Vietnam in 1998 through Resolution No.03-NQ/TW of the 8th National Congress. Fifteen years later, culture as a part of the economy was officially recognised as 'cultural industries' in Resolution No.33/NQ-TW of the 11th National Congress. In this document, for the first time, the Communist Party of Vietnam officially used the term "cultural industries". According to the Resolution, among the six missions for sustainable cultural and human development, the development of cultural industries and of cultural market was included. Near the end of 2014, the Government of Vietnam issued Resolution No.102-NQ-CP/Action Plan to implement Resolution No.33 of the National Congress on cultural and human development. The action plan indicates that by 2020, development of a cultural market and promotion of certain high potential cultural industries should be achieved. Vietnamese culture should have also gained a place in the international market. One important mission is the continuation of legal framework development and institutional system reform. The Government set the goals of completing the development of a cultural market, enhancing the competitiveness of Vietnamese cultural regionally and internationally as well as finalising the legal and institutional reform for cultural and human development by 2030. Resolution 102 requires ministries to meet responsibilities and conduct missions stated in the action plan. With approval from the highest level, the Ministry of Culture, Sports and Tourism was assigned to draft the 'National Strategy for the Development of Cultural Industries in Vietnam to 2020, Vision 2030', approved by the Government through Decision No.1755/QĐ-TTg (08/09/2016).

Currently, as per Decision No.1755/QĐ-TTg, four out of seven ministries and departments have developed plans and reported implementation results. Specifically, four ministries have prepared plans (Ministry of Internal Affairs, Ministry of Information and Communication, Ministry of Industry and

Trade, Ministry of Finance) and three ministries have yet to prepare plans (Ministry of Construction, Ministry of Planning and Investment, Ministry of Foreign Affairs).

Results of the Ministry of Culture, Sports and Tourism's implementation of Decision No.1755/QĐ-TTg include assigning the Copyright Office to preside over and coordinate units under the ministry to oversee the following five fields (film, performing arts, fine art, photography and exhibitions, cultural tourism), promotional activities in accordance with tasks promulgated in conjunction with Decision No.1755/QĐ-TTg, such as developing a database on cultural industries and training and developing human resources for cultural industries. However, regarding the two missions: developing the "Scheme for Society's Awareness and Public Audience Enhancement for Cultural Industries" and "Scheme for Development of a National Branding for Cultural Industries", the Ministry of Culture, Sports and Tourism submitted an official letter to the Government Office requesting their withdrawal from the Government's 2017 Work Programme after careful consideration and assessment and on the account of the necessity of a more appropriate time slot assignment.

Through studying the legal framework, this report's researcher realized that despite the State's recognition of cultural industries' role in the economy, the concept of cultural industry and its branches have yet to be clearly defined. The current management system (departments managed by designated ministries), monitoring (censorship) of creative hubs' activities as well as red tape and dissonance in awareness between ministries, departments and local authorities remain the biggest challenges. According to research reports, there is still a gap between what is said and what needs to be implemented for adequate exploration and nurturing of creative hubs' development in Vietnam.



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In a discussion about this overarching strategy with Le Quoc Vinh (media expert, President of Vietnam Creative Entrepreneurs Club), he said: "These are the initial efforts to recognise and establish a foundation for a legal system that supports the creative industry. [However] this is just the general strategy, which does not fully reflect the operation systems and solutions for each creative industry. For a more practical solution, there needs to be schemes at national level specific for each industry, each occupation with consultation from expert practitioners." He also added: "In recent years, the authorities have been more friendly and facilitative towards creative hubs. There are creative hub development plans that are directly implemented by State-run management agencies or political-social organisations. For example, art galleries in Hanoi, VICAS, pedestrian zones with craft and fine art space, or book streets. The Youth Union even actively participates in the opening and operation of creative hubs and the support of start-ups in Hanoi. There has been more experimental arts support centres, and licensing is no longer too difficult an issue. Even art programmes previously considered to be of sensitive nature are now receiving operation licenses. So, I'd say there have been positive movements. However, it's not like we already have a creative space as expansive and free as creative people hope for. It is not just an issue of awareness, it is now about the lack of specific action plans and support for creative hubs. For example, there is a lack of public spaces for performances and exhibitions."

In order to meet their potential, creative hubs require State support through practical policies such as tax incentives, support for venues and licensing, censorship, as well as cohesive actions and decisions from authorities of all levels, from State leaders to State employees working in relevant fields. The onus is on decision-makers to take timely action to benefit all and create change when necessary.

Another big challenge all creative hubs and the creative industry face in Vietnam is the **departmentalisation management system**, which cannot deliver a comprehensive approach and equal knowledge to all creative industries. For example, the Ministry of Culture, Sports and Tourism oversees visual arts, photography, music, theatre and copyrights, the Ministry of Science and Technology oversees technology, science and intellectual property, the Ministry of Information and Communication oversees newspapers, television, radio, publishing and information technology, the Ministry of Construction oversees architecture and the Ministry of Education and Training oversees education and training, which relate to all creative industries. Another important reality that separates cultural industries from other creative industries is that culture (and communication) is considered to be representative of Communist Party ideology in society. All cultural activities are therefore monitored and controlled carefully by the Communist Party and authorities of all levels.



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“Culture is an essential part of the ideological and cultural revolution, a great drive, and an important objective in the cause of socialism development” (Resolution 05, Ministry of Politics, 1987). “The development and expansion of culture is a great cause of the people championed by the Party, and in which the intellectual crowd holds an important role” (Resolution 03-NQ/TW, Central Committee, 1998).

There are many hubs struggling to continue operations while facing challenges that limit access to resources. Major challenges include a young market for cultural and creative products, lack of governmental support and cohesiveness in management between different levels of authorities. Some creative hubs doubt the government’s capacity to deliver solutions. Other hubs have separated themselves from the government or cared little for policy-making issues. Regarding creative communities’ interest in policy-making, there is a distinct difference between creative hubs in Categories 1 and 2 (defined in Part I of this report). Creative hubs in Category 1 are quite detached from each other and are yet to show a willingness to connect and collaborate, while Category 2 creative hubs have been more proactive. Category 2 creative hubs recently raised a motion to annul Article 292 of the 2015 Criminal Code (effective July 1, 2016) related to the licensing of all internet services. This motion collected more than 6,000 signatures of individuals in start-up industries and was submitted to Government leaders as well as ministries, which contributed to a temporary suspension of the Criminal Code (Ly, 2018).

Moreover, of the 56 students in the “public-private partnership model in cultural and creative hubs’ development” class taught by the researcher in September 2018 in Danang, who are also management staff of different government agencies, almost all refused to answer or comment on issues related to the strategy. Only six people agreed to comment with the condition their names and workplaces

would not be mentioned. When asked for the reason, they stated they did not have enough information, nor did they directly interact with the strategy. “Simply there are no leaders, no budget and the distribution and assignment of tasks to smaller organisations created fractured, unusable results”, said an official from a Ministry of Culture, Sports and Tourism department.

Public-private partnership models/projects are also an effective solution to create a channel to utilise direct governmental support and investment. An example of this is the **public-private partnership project Vietnam Silicon Valley (VSV)**. With the desire to apply the best experiments of the U.S’ Silicon Valley to Vietnam, VSV is a pioneering project that nurtures a selection of potential start-up enterprises through training programmes that provide knowledge and skills as well as connections to investors. The project is implemented by the Ministry of Science and Technology and ATV Company and is recognised and supported by the Government. The VSV model is a typical example of a public-private partnership in creative industries with a direct relation to “actual business” (Ly, 2014). Another successful public-private partnership example is the Danang Start-up Incubator DNES with its co-working spaces, incubators and start-up support services. Taking the chance to enlist the support of local authorities, DNES has been able to build up its brand as the leading “start-up hub” in the region.



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PART V:

RECOMMENDATIONS

ON THE DEVELOPMENT OF SUPPLEMENTARY POLICIES AND SPECIFIC ACTION PLANS TO PROMOTE DEVELOPMENT OF CULTURAL INDUSTRIES AND ENCOURAGE CCHS' CONTRIBUTIONS TO OBJECTIVES STATED IN NATIONAL STRATEGY FOR DEVELOPMENT OF CULTURAL INDUSTRIES IN VIETNAM TO 2020, VISION 2030.



1. A FAVOURABLE ENVIRONMENT AND AN INTERDISCIPLINARY PERSPECTIVE

Public-private partnerships are crucial for the development of cultural industries. Cultural industries' success and values cannot be assessed like other industries as the former is a business model that does not operate purely for profit, as it provides inspiration for other industries. Creative hubs require more time and initial support to grow. The Government should not leave these hubs to fend for themselves and instead should support them by providing space (rented space or apply low rent prices, for example the Vietnam Silicon Valley model occupies space at the Ministry of Science and Technology headquarters or Danang Startup Incubator DNES, which rents public space with State-controlled prices). The Government should limit the level and regularity of its engagement and it could support creative

industries by investing in infrastructure (provision of internet, electricity, water) for creative hubs, as costs of infrastructure can be high.

In addition, the interdisciplinary approach plays a vital role. The National Strategy for Development of Cultural Industries in Vietnam to 2020, Vision 2030 can only be effectively achieved with practical results when close cooperation between ministries occurs with cohesive and meticulously coordinated implementation consistent with the strategy. Planning must be continuous from central to local levels and funding must be distributed to each specific period of implementation. In a discussion with researcher Nguyen Thi Thu Ha (VICAS Arts Studio), she said: *"The strategy is the national framework, therefore for programmes and actions at this level it is necessary to have genuine, practical interdisciplinary collaboration between the ministries."* She said

missions could not be separated as designated tasks of one ministry and cooperation between ministries was essential. For example, without the participation of the Ministry of Industry and Trade, Ministry of Science and Technology and the Ministry of Information and Communication, the Ministry of Culture, Sports and Tourism could not independently build a database to help develop a national data framework for Vietnam's cultural industries and yield statistics on creative enterprises' activities as well as export and import cultural products and services.

From the Government's perspective, the task of assessing which position creative hubs should occupy within the economy is highly important. If creative hubs are only positioned in "cultural and social fields", it will be inadequate as these hubs need to be considered as a multifaceted area with an interdisciplinary approach.

2. NECESSITY TO REVIEW AND RECONSIDER RELEVANT LEGISLATIVE AND LICENSING REGULATIONS

Restructuring of the licensing and censorship process is needed to ensure it is simple for hubs to follow. Another option is to shift this process entirely from “requesting permit to organise the event” to “notify of the upcoming event”.

Additionally, hubs should be recognised and given a unique position in the legal system similar to community development business activities. Creative hubs must be referenced in governmental institutes currently undergoing reform. The issue here is that institutes were established to meet the needs of an industrial economy and society. However, these institutes are no longer suitable for challenges of the creative/information/post-technology economy.

Art hubs cannot be enterprises as their distinctive activities create spiritual values for society, instead of just exclusively materialistic values. Many hub owners stated they desired to be defined as “creative hubs” - a distinctive type of business/organisation model. This way, art hubs will have their own playground to exchange and interact with different bodies, such as State agencies, enterprises and organisations.

3. DIALOGUE

Another recommendation proposed by all reviewed reports was allowing owners of CCHs to directly and openly engage law-makers. Researchers and operators of these hubs believed only direct dialogue would yield mutual understanding and a foundation for development of appropriate and practical policies. “Open dialogue” here refers to intimate and open meetings between hub owners and law-makers. Meanwhile, activities like “workshops” and “research/reports” are too formal, impractical and indirect. It is necessary for law-makers to increase their awareness of the knowledge and skills involved in this field. One common issue is how law-makers often have their perspective based on general economic development policies or previously effective cultural policies. However, these policies do not fit the creative economy.

4. CHANGE DISCUSSION METHODS REGARDING CULTURAL AND CREATIVE HUBS

Knowledge and creativity are social processes that appears in communities and networks (often through exchanges and interactions). Moreover, knowledge and creative processes are not limited to simply adding to what already exists. The creative hub, network or ecosystem is a platform for new ideas to grow. These platforms usually consist of physical spaces, but that is only the start. Visible in the development of creative hubs is a dependence on infrastructure. The emergence of new buildings and restoration of old ones have unintentionally papered over other non-physical changes, including transfers of knowledge and development of creative communities.

The focus of fresh dialogue on creative hubs should focus on hub operations, how creativity, innovation and knowledge transfers have occurred, how support is delivered and potential obstacles in such delivery, the necessity of practical knowledge transfer processes, individuals relevant to creative hubs and their value system and ambitions, and the means to monitor creative hubs’ activities. If these issues can be managed in a creative and innovative way, creative hubs can potentially achieve more effective results compared to when operating separately from each other.

5. LOCAL CAPACITY BUILDING

This can be explained as establishment of hard infrastructure and commercial and legislative platforms for creative hub activities. However, development of soft infrastructure related to training and education as well as a policy system and management capacity are also vital. The first issue to be examined should be identification of creative communities and their spaces. This involves a community identification and development process to determine potential clients of creative hubs. It will also identify different art forms or activities and interests and determine which overlap and are missing.

Consideration of development needs and provision of necessary skills for people in the industry is essential. These skills will broaden the capacity and elevate the work of creative hub managers. This is the foundation for a creative community that will witness strong and sustainable future growth.

6. THE LINK TO EDUCATION AND TRAINING SYSTEM

The goal of CCHs is reaching an audience, yet they have no connection to education systems and universities. Many creative hubs are interested in cultural and art supplementary and skill development programmes or simply growing their audience. However, they encounter difficulties in attracting the attention of universities in creative fields where training programmes are more traditional and come from a different perspective of what is considered art and culture (partly depends on legal regulations). This can be interpreted as the creative economy being ahead of the education system and legal and legislative systems, which causes conflicts and difficulties. In Europe, higher education institutes often consider participation and collaboration with creative hubs to be an important part of their role in the community. Once again, there needs to be a multidisciplinary approach including economic, cultural and educational policies.

7. TAX INCENTIVES, FINANCIAL SUPPORT/FUNDING FOR HUBS, ESPECIALLY THOSE SUPPORTING YOUNG TALENT, HUBS BASED IN RURAL AREAS AND THAT SUPPORT ETHNIC MINORITIES AND VULNERABLE GROUPS

One of the inadequacies of the National Strategy for Development of Cultural Industries in Vietnam to 2020, Vision 2030 is the lack of budget planning for implementation of the strategy. Without funding distribution, the missions stated in the strategy become extra work for departments and agencies already handling a multitude of other tasks, therefore leaving implementation fragmented and disconnected.

A key lesson can be learnt from the implementation of “Scheme 844”, the Ministry of Science and Technology’s Scheme for Supporting Vietnam’s Innovation and Creative Startup Ecosystem and funding allocation for its implementation. Annually, the State will approve a budget for implementation of missions with specific activities and outcomes. Based on this list of missions, the ministry opens bidding packages to invite capable organisations to register in the form of counterpart funding. Despite being in just its third year of implementation, there have been very positive results generating new breakthroughs in national innovation and creative ecosystem development.

8. SUPPORTING THE MEDIA TO ENHANCE THE “WORKING TOGETHER” ATTITUDE

According to Professor Pratt’s report (2017), owners of co-working hubs believed this would be beneficial and help inspire freelancers. With the number of freelancers increasing globally, co-working spaces have great development potential.

Public relations and media in this context should be considered in a wider perspective. This means promoting creative industries and developing a market of consumers of art and cultural products as well as a social environment supportive and understanding of creative values.

CONCLUSION

THE SEARCH FOR SUSTAINABLE DEVELOPMENT OF CULTURAL AND CREATIVE HUBS

One of the key findings of this report is the growing of cultural and creative hubs in Vietnam. This is the best foundation for the long-term development of creative industries, in which cultural and creative hubs have already demonstrated their roles and contributions to the development of cultural industries and the general economy of the nation.

Firstly, these cultural and creative hubs have become centres to attract and encourage enterprises to gather, discuss and learn from each other and more importantly to collaborate, create creative products and develop business partnerships.

Secondly, cultural and creative hubs create a lively atmosphere, which acts as a driving force for artists, creative enterprises, business people as well as the entrepreneur community.

Thirdly, these hubs portray a clearer picture for communities, managers and other stakeholders to help them better envision the shape and potential of creative industries.

The National Strategy has defined a clear vision for the development of creative industries. The communities are ready. Now, the next steps to be taken are detailed implementation plans with well defined and measurable criteria to form sustainable development of cultural and creative hubs, contributing to sustainable development of Vietnam’s cultural industry.

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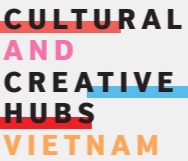
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