Creative Industries in the South East Europe

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Help-Forward Network

12th Summer Academy

"Culture and Landscape: contributions to sustainable rural development"

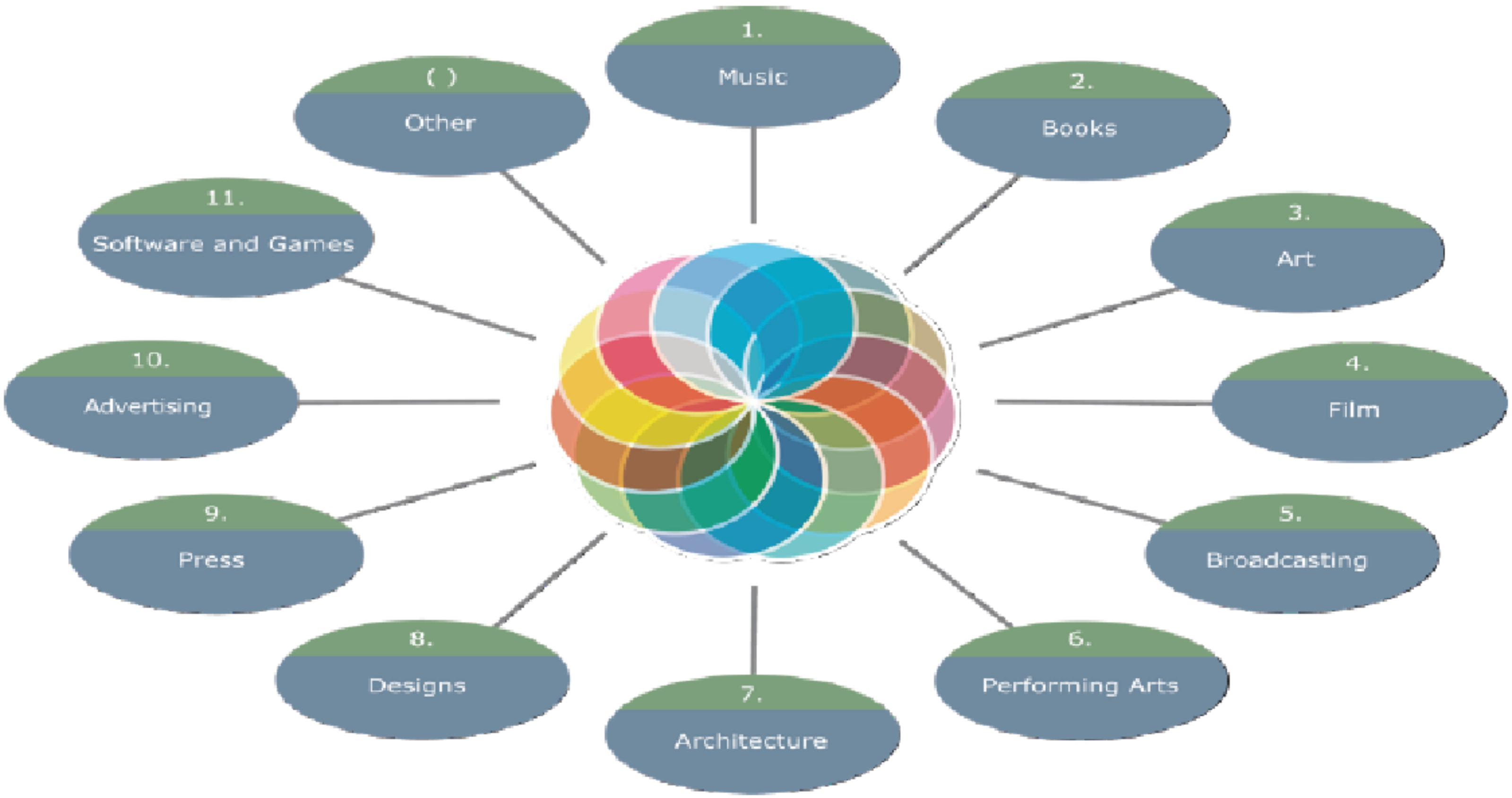
13th July – 21st July 2013, Loški Potok, Slovenia

Agenda:

Definition and facts about creative industries
Creative industries as key economic sector to recovery
Innovative services to creative industries

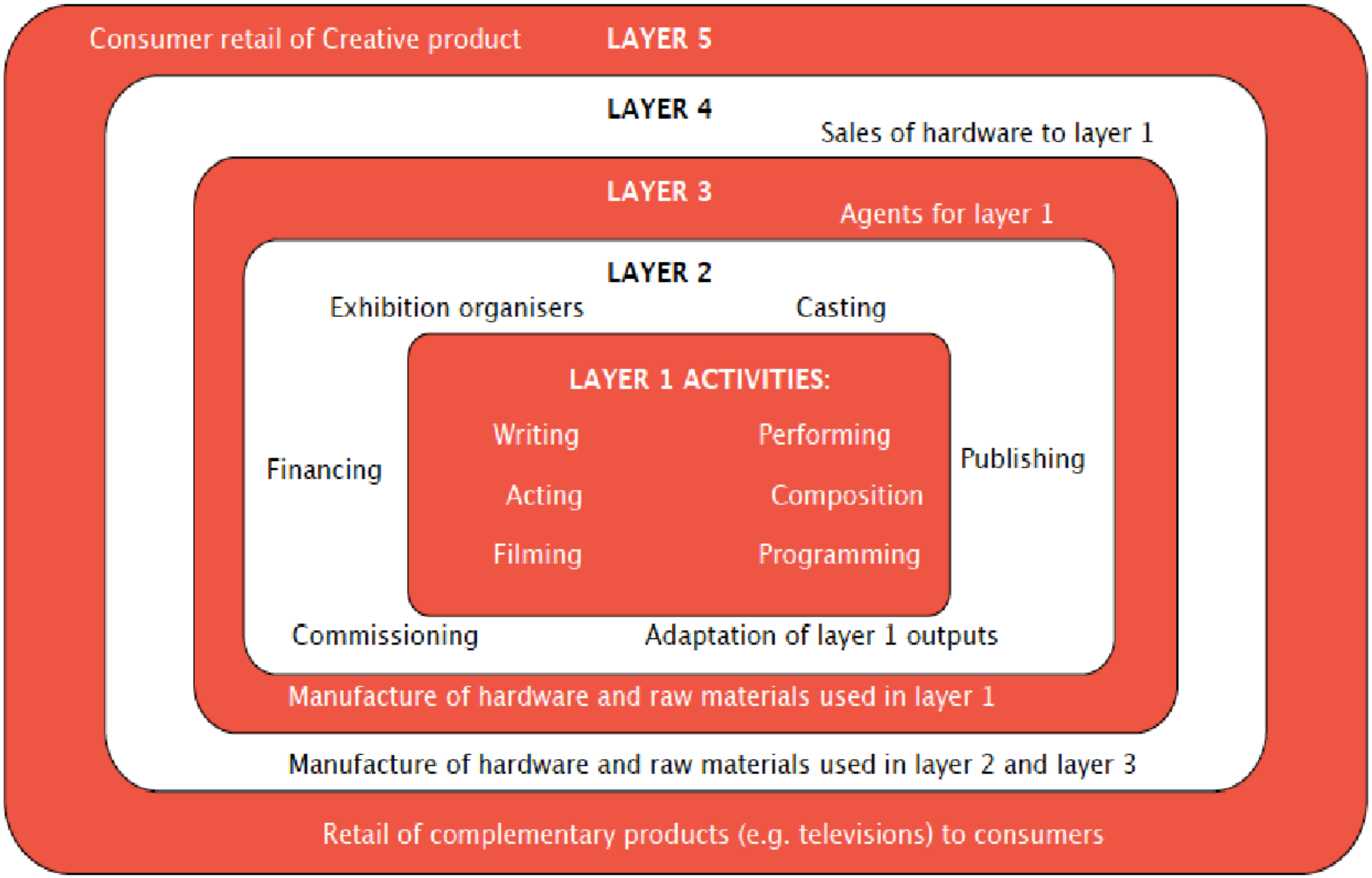
1)Definitions and Facts

Who belongs to the culture & creative industries?



Source: Research Report on Culture&Creative Industries of the German Federal Government, 2009

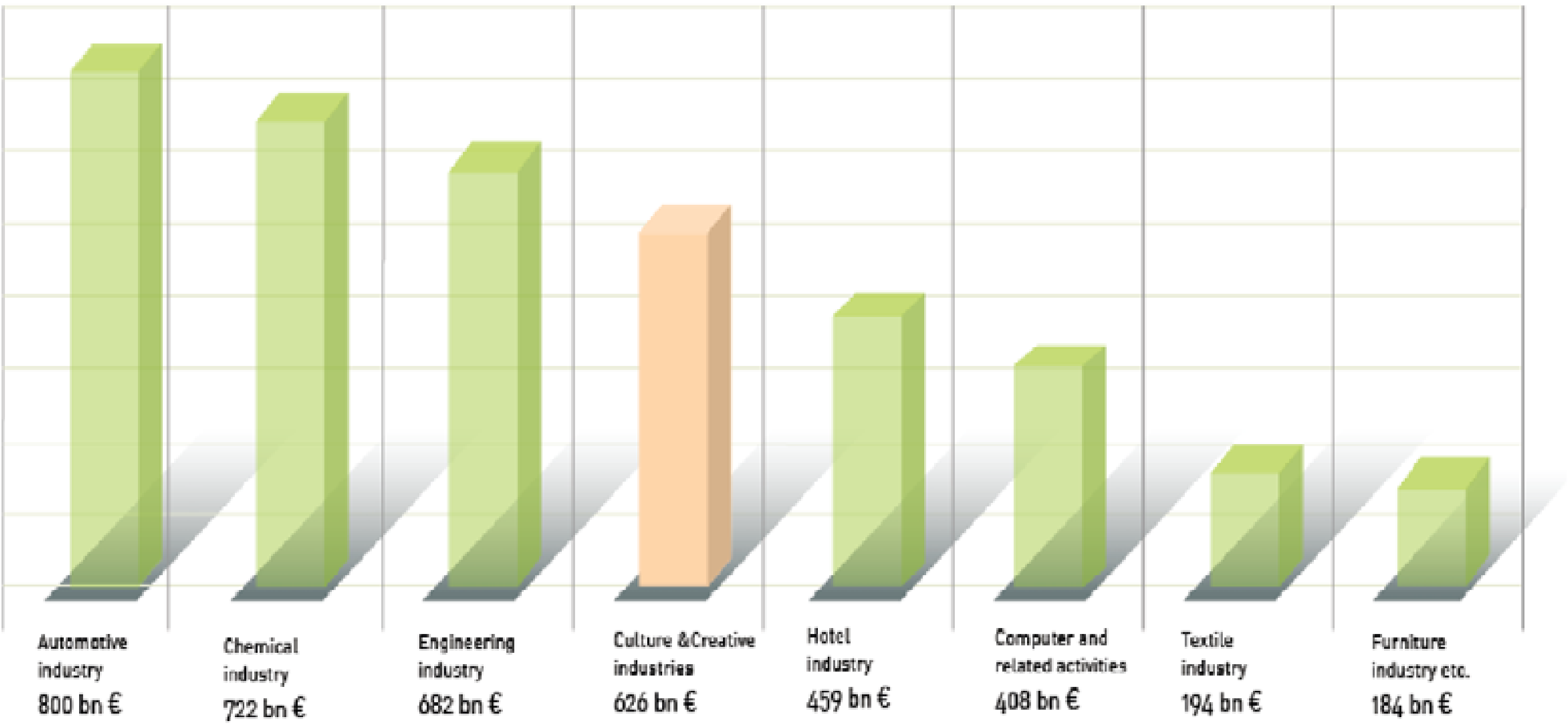
How can we define the creative core?



Source: frontier economics Ltd. London, Creative Industry performance. A statistical analysis for the DCMS, 2008

Is the European culture & creative industries important?

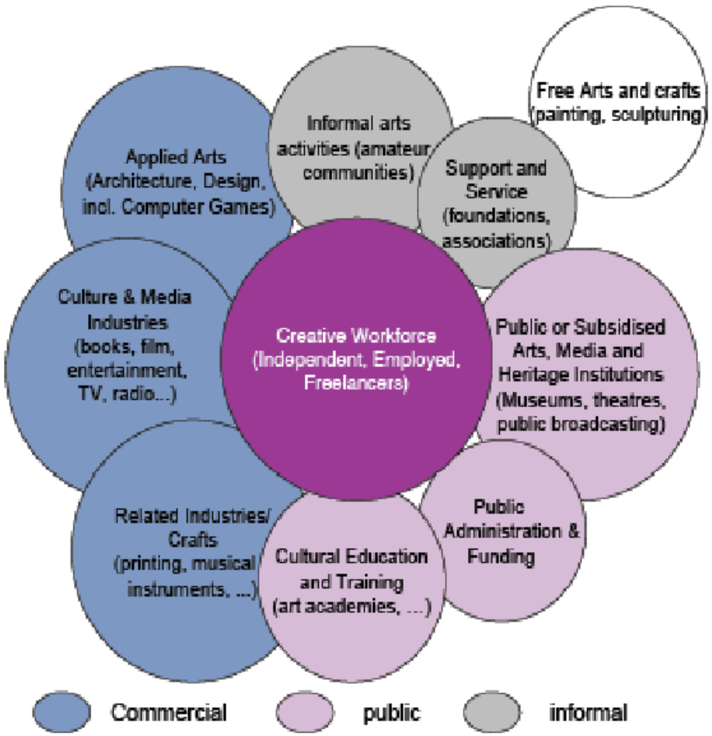
Culture & creative industries comparing to other industries, turnover (€ billion), 2007



Notes: Key industries = provisional data SBS 2007, EU27; Culture & creative industries = estimates from national sources 2007
Sources: EUROSTAT, Structural Business Statistics; Office for Culture Industries/Michael Soendermann, 2010

Is the European creative sector unique anywhere in the world?

What is the „Creative Sector“?



Source: Wiesand, A. J.; Söndermann, M. (2005). The "Creative Sector". European Cultural Foundation.

The sector comprises

- heavily industrialised services
  - advertising & marketing,
  - broadcasting,
  - film industries,
  - Internet and mobile content industry,
  - music industries,
  - electronic publishing and print,
  - video & computer games
- less industrialised activities
  - museums and library services
  - visual arts (painting & sculpture)
  - performing arts,
- other creative activities (crafts, fashion, design industry).

Delphi Workshop on the European Creative Contents Sector, Brussels, 11-04-2007

Source: European Perspectives on the Information Society – EPIS. Michael Friedewald, Fraunhofer ISI Brussels 11 April 2007, Delphi Workshop

Who belongs to the culture & creative industries in statistical terms?

The Classification of culture & creative industries (NACE Rev.2) following the „LEG"-model

58 - Publishing activities
59 – Motion picture, video etc
60 – Radio and television activities
90 – Creative arts activities etc
91 – Libraries, archives, etc
71.11 – Architectural activities
73.1 – Advertising activities
74.1 – Design activities

These eight groups are the core in the „LEG"-model

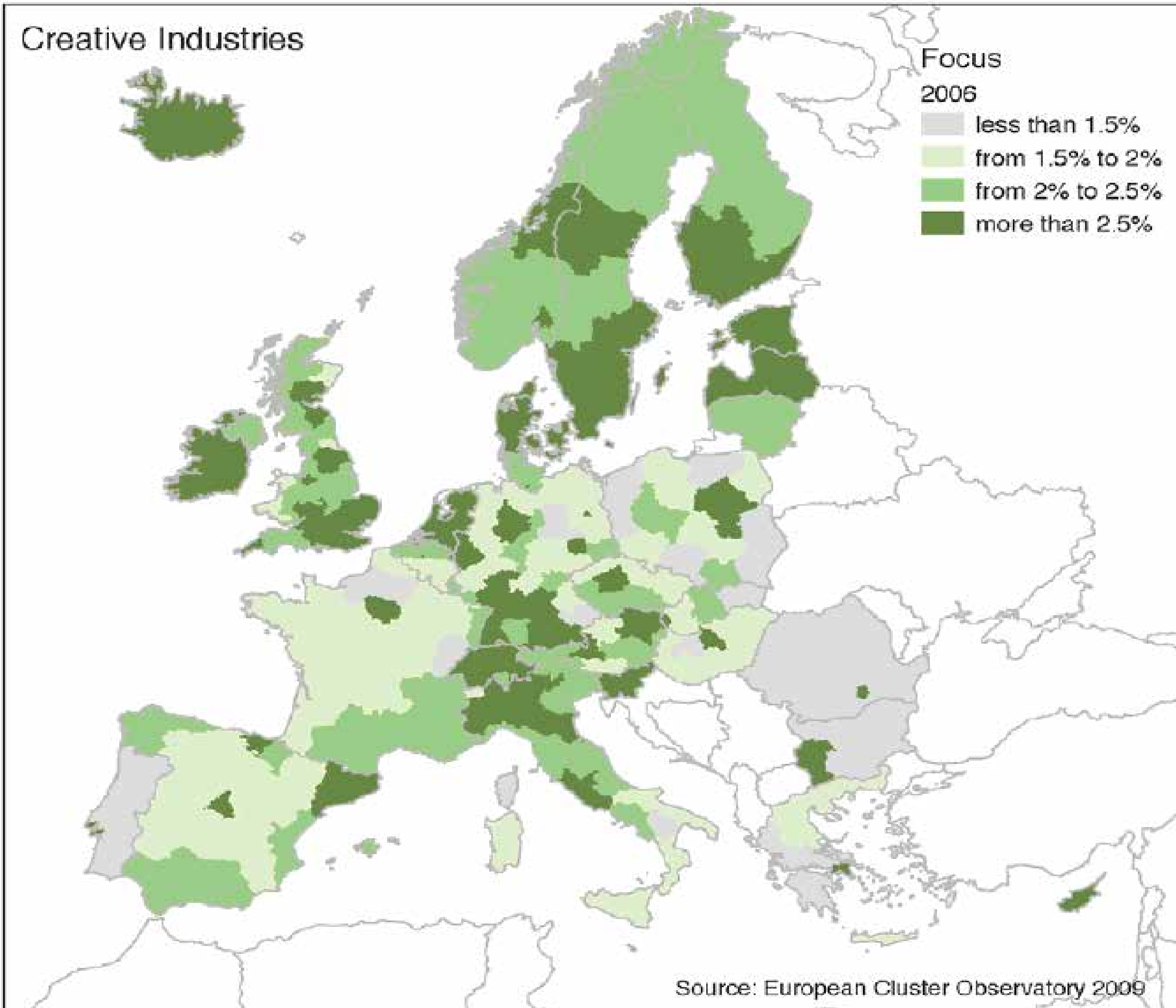
47.6 and 47.78 - Retail sale of cultural goods

85.52 - cultural education

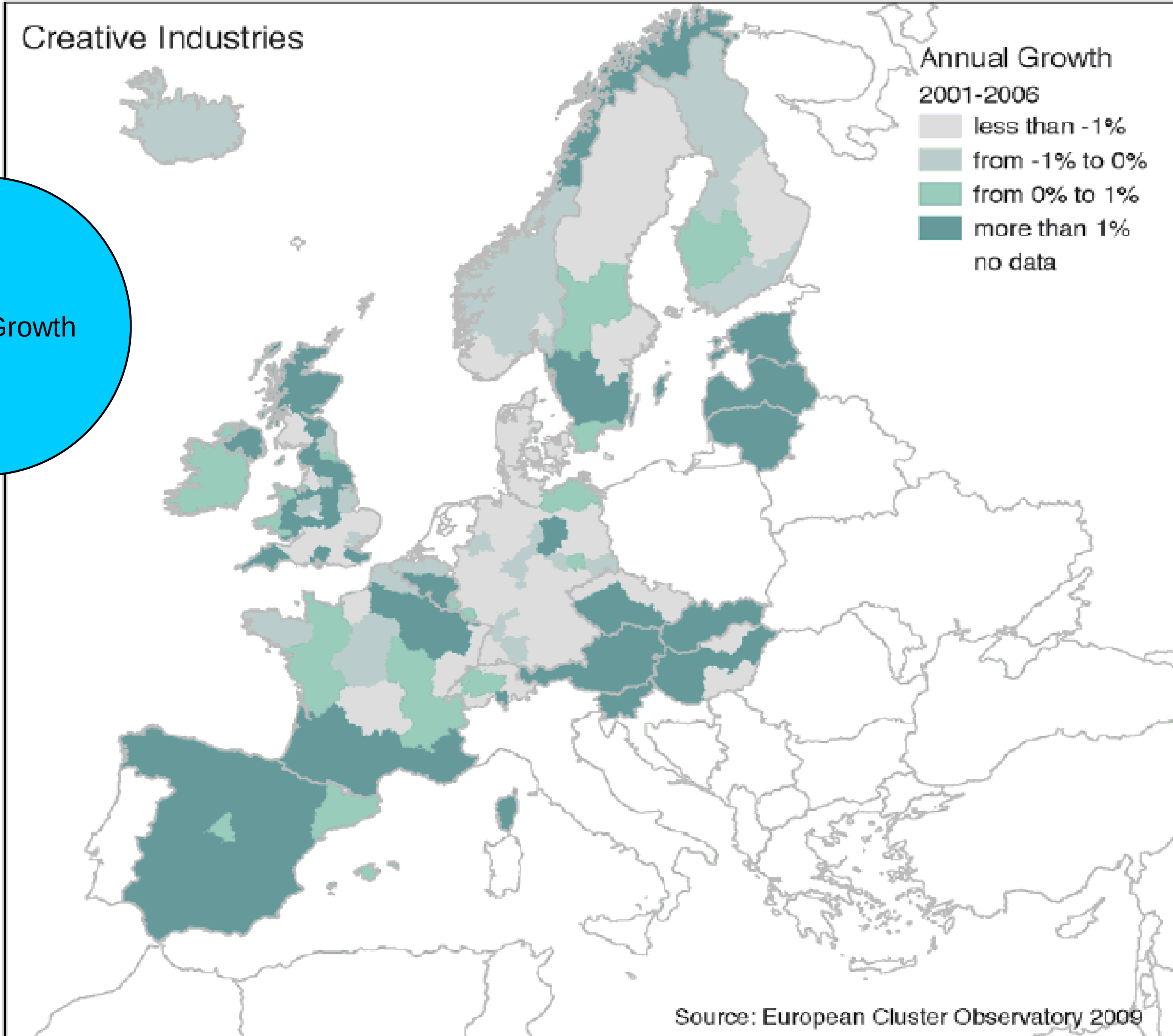
62 - Computer programming, and so on

In addition, the three groups in discussion of the new classification of cultural and creative Industries should be at least implemented.

Source: LEG-European Leadership Group on Cultural Statistics, Eurostat, 2001


Creative Industries
Focus
2006
less than 1.5%
from 1.5% to 2%
from 2% to 2.5%
more than 2.5%
Source: European Cluster Observatory 2009

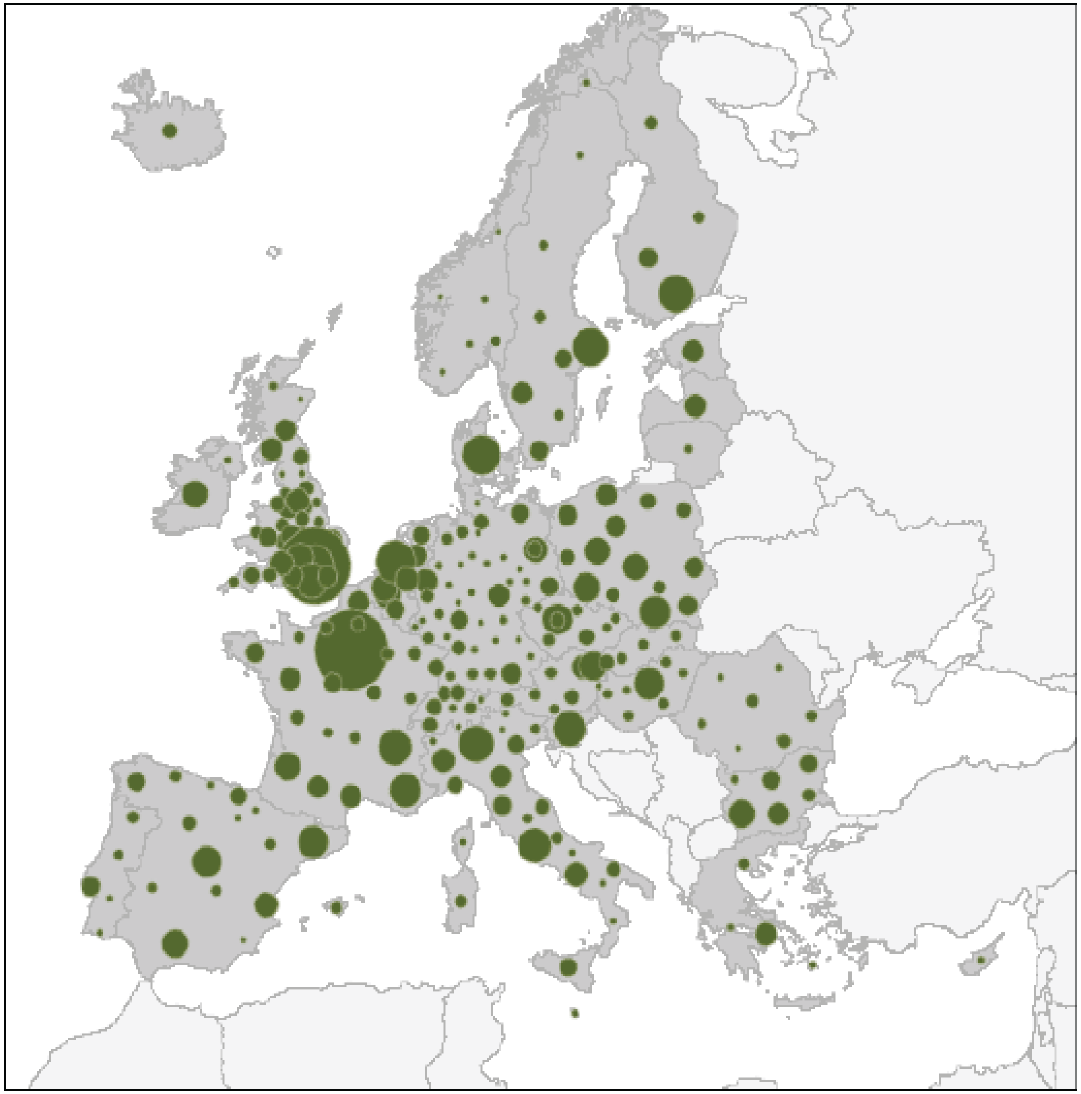
Annual Growth



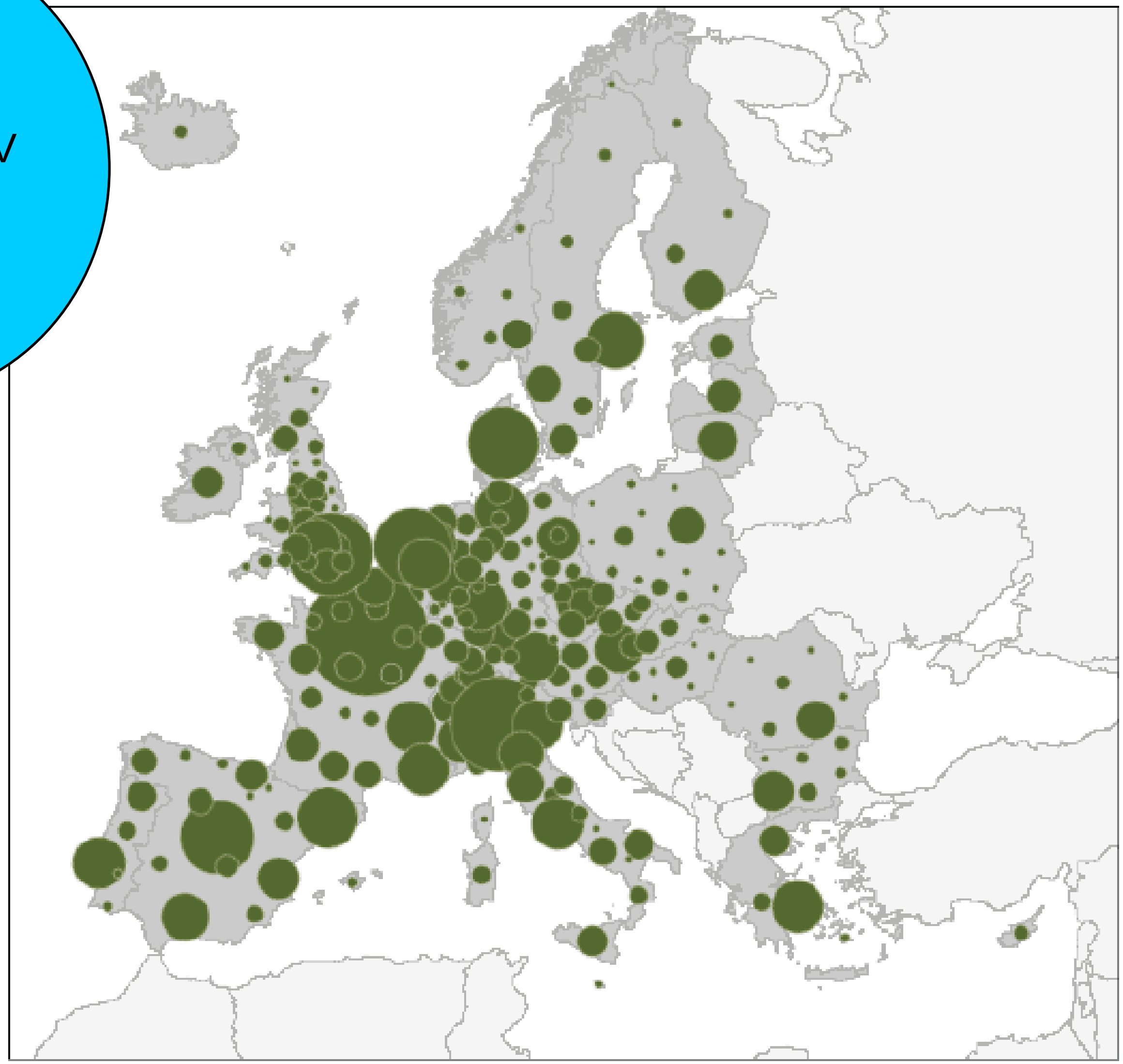
Employment

Region	CCI Rank	Employment	LQ
Île de France (Paris), FR	1	301,895	1.53
Inner London, UK	2	235,327	2.19
Lombardia (Milan), IT	3	195,848	1.28
West-Nederland (Amsterdam), NL	4	195,646	1.56
Madrid, ES	5	172,800	1.58
Cataluña (Barcelona), ES	6	153,202	1.30
Danmark, DK	7	124,352	1.28
Lazio (Rome), IT	8	118,047	1.51
Oberbayern (München), DE	9	97,050	1.59
Stockholm, SE	10	86,239	2.16
Kozep-Magyarorszag (Budapest), HU	11	82,429	1.73
Outer London, UK	12	80,845	1.28
Berks, Bucks and Oxon (Oxford), UK	13	80,628	1.82
Attiki (Athens), GR	14	78,920	1.26
Oost-Nederland (Nijmegen), NL	15	74,064	1.39
Andalucía (Sevilla), ES	16	71,843	0.74
Ireland, IE	17	70,602	1.18
Zuid-Nederland (Maastricht), NL	18	70,543	1.28
Darmstadt (Frankfurt am Main), DE	19	68,238	1.23
Piemonte (Turin), IT	20	66,291	1.04
Köln, DE	21	65,341	1.28
Etelä-Suomi (Helsinki), FI	22	64,500	1.43
Veneto (Venice), IT	23	63,024	0.89
Stuttgart, DE	24	61,626	1.17
Berlin, DE	25	60,736	1.53

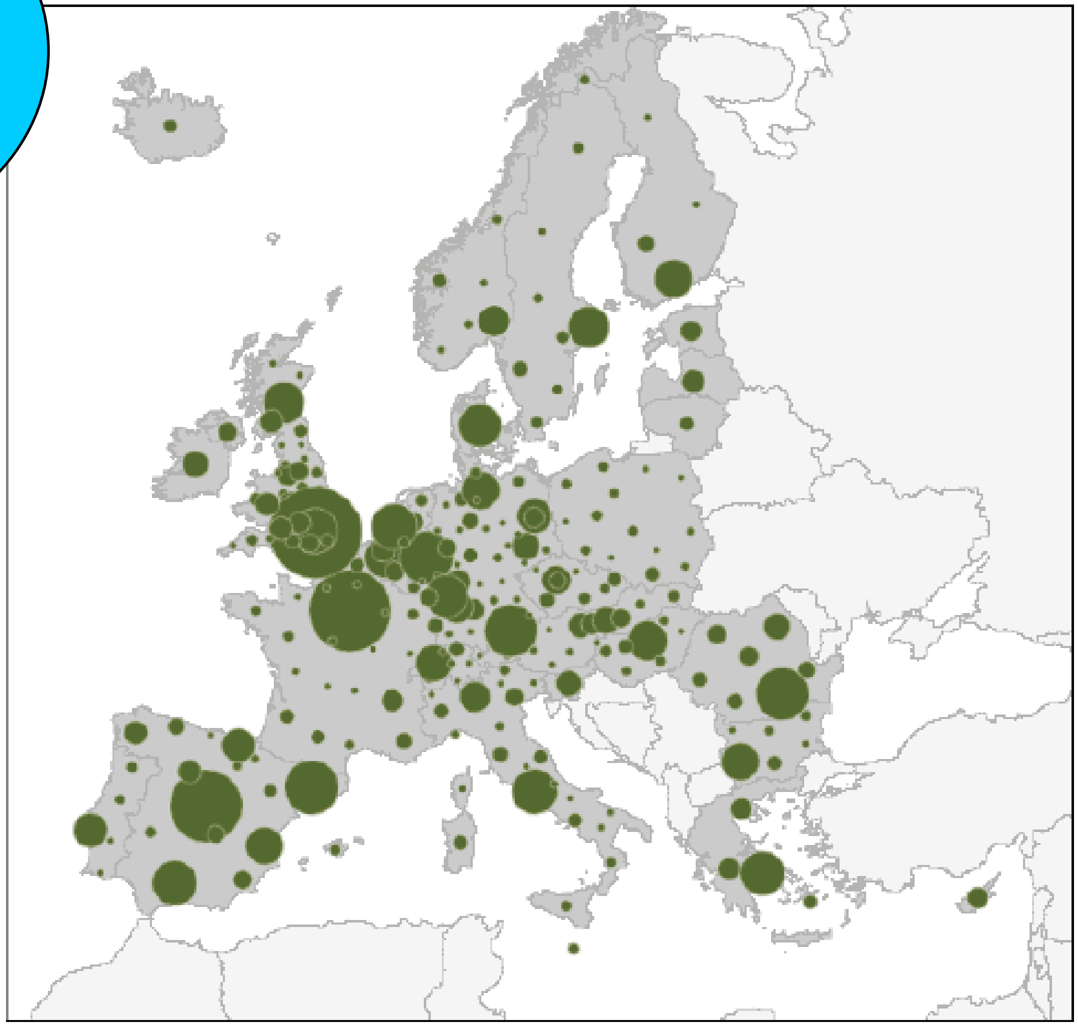
Advertising



Radio and TV



Museum Activities



2) Creative industries as key economic sector to recovery

Creative Economy: a feasible option

- The concept is gaining ground in economic strategies thinking
- Creativity, knowledge and access to information are driving economic growth and social cohesion
- Contemporary world increasingly dominated by images, sounds, texts and symbols
- Technology advances affected the way creative products are created, produced, re-produced and distributed
- Globalization and connectivity changed our life-style leading to new patterns of consumption of creative products

Creative economy already leading employment, trade and innovation in many parts of the world

Salient features of the creative global market

So far in the 2000’s unprecedented growth compared with traditional services and manufacturing

New dynamic sector in world trade – 8.7% annual growth during 2000-2005 period

Generate revenues from trade about US$ 424 billion/year and gains from intellectual property rights (no data)

The creative economy calls for a multi-disciplinary approach and concerted inter-ministerial policy actions

Creative responses to stimulate economic recovery

- At the heart of the creative economy are the creative industries
- Interplay of sub-sectors including the most technology-intensive and services-oriented such as new media, audiovisuals, digital services etc.
- Every day everywhere in the world most individuals consume creative products at home, work as well as in times of leisure or entertainment
- We listen to music, watch TV, read newspapers, go to cinema, theater use software in the computer, play video-games, read advertisings,etc..
- Upturn in cinema admissions during the crisis (+8.8% in the USA)

Creative industries stimulate demand even in times of crisis

Creative industries in advanced countries

- Creative sector in OECD countries growing faster than the traditional services sectors and manufacturing

- In Europe (30 countries) the creative economy generated a turnover of 654 billion euros creating nearly 6 million jobs in 2003 (KEA)

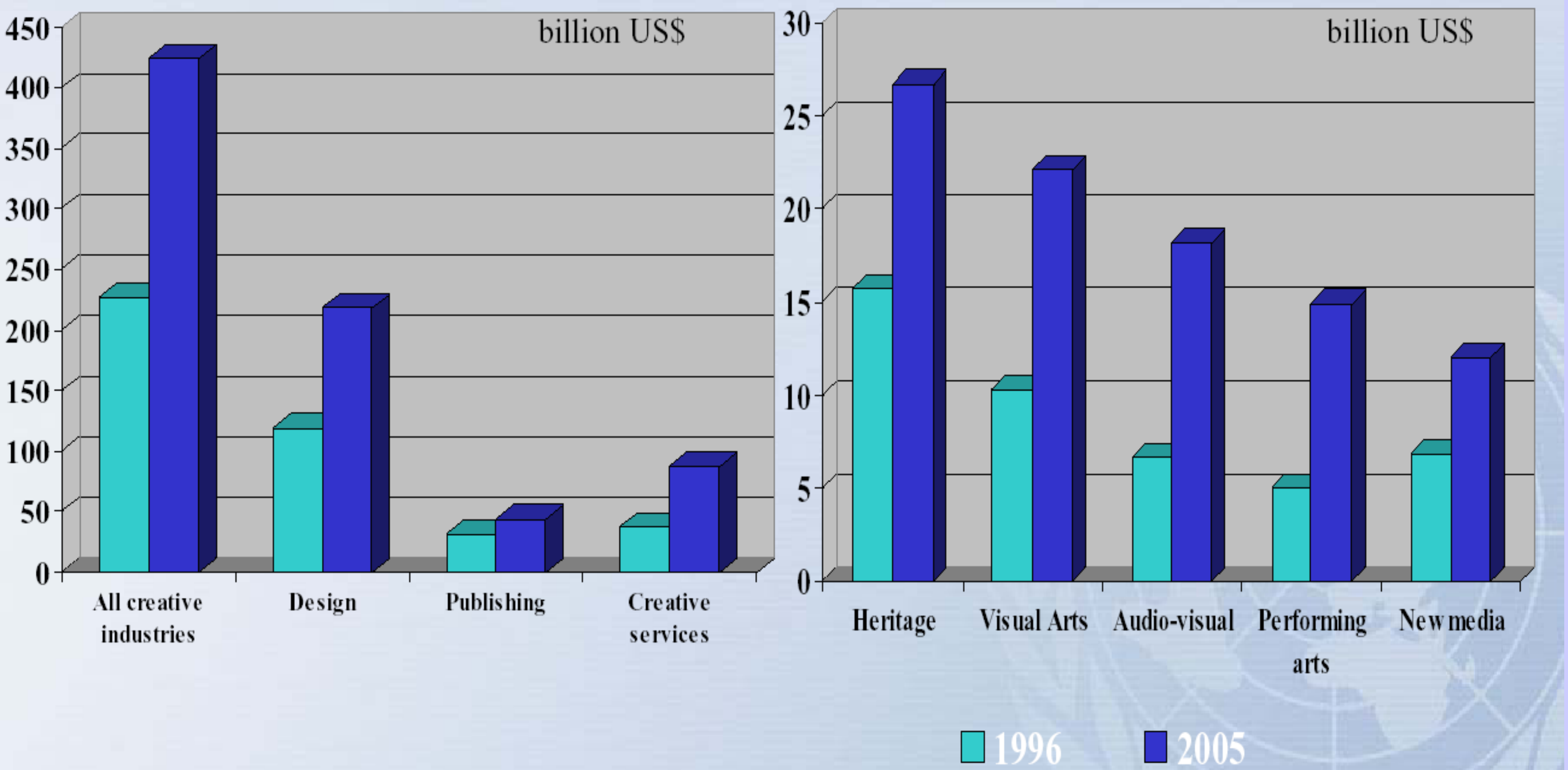
- Creative industries contribute to output, value added, income and the balance of payments, contributing to about 2 to 6% of GDP (OECD)

- Creative cities concept is revitalizing socio-economic growth in many European cities in the post-industrial era - UK, Spain

- Europe has rich cultural diversity and creative assets « culture-base creativity » Multiculturalism stimulate creativity

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

Creative Industries : a dynamic sector
world exports creative goods and services



Source : UNCTAD

Creative economy: leading trade in Europe

• EU exports of creative products increased 43% over 1996-2005

• In 2005, EU (27) led world exports of creative goods– US$ 145 billion

• Italy strong position in design

• Creative services rising sharply 11% annual growth 2000-2005 (advertising, architecture, digital, R&D)

• Developed countries accounted for 82% of world services exports

Table 5.7 Creative goods: Top 10 exporters among developed economies, 2005

Rank	Developed economy	Value (in millions of $) 2005	Market share (%) 2005	Growth rate (%) 2000-2005
1	Italy	28,008	8.35	5.9
2	United States	25,544	7.61	3.6
3	Germany	24,763	7.38	14.2
4	United Kingdom	19,030	5.67	9.8
5	France	17,706	5.28	8.6
6	Canada	11,377	3.39	1.7
7	Belgium	9,343	2.78	-
8	Spain	9,138	2.72	8.1
9	Netherlands	7,250	2.16	9.7
10	Switzerland	6,053	1.80	9.1

Source: UNCTAD.

What options to redress the post-crisis global economy?

For a sustainable recovery, we need :

- new investments
- new employments
- new mechanisms to finance creative enterprises
- new opportunities for high-growth sectors
- new options, new ways, new concepts
- stimulus for creativity and innovation

We need to bring back confidence to small investors and creative entrepreneurs

3) Innovative services to creative industries

a) Potential new ways of delivering creative business innovation support services (BISS) across borders

- The establishment of **innovation vouchers** at national and regional level would help creative SMEs acquire professional skills they cannot afford (in technology, marketing, advertising, design, etc.) and trigger innovation in other industries21.

- Another way of promoting a more entrepreneurial culture in Europe through CIs would be to promote the integration of **design thinking in businesses**. In an increased number of major companies in the high-tech sectors, designers are working closely with engineers, marketers and manufacturers. Designers are not only stylists but also contribute to innovation in the use of new materials and production processes.

2) Creative knowledge transfer mechanisms and multi-disciplinarity

- The development of a **"creative broker"** facility whose role would be to enable creative entrepreneurs to reach new markets and non-creative sectors by providing culture-based creativity services could be envisaged.

- The establishment of **creative clusters** composed of research centres and artistic schools could also be discussed. Indeed, the collaboration between artists, designers and technologists opens new ways to create innovative products and services and fosters innovative solutions at the interface of creativity and technology in a wide range of areas.

- The initiative could reflect the setting up of **creative business incubators** (i.e. low-cost shared facilities for creative businesses which are linked to arts schools or universities arts departments) that offer opportunities for students to take their first steps in business in a supportive environment

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• On a different level, a European initiative could contribute to facilitating much more **exchange between policy makers, innovation support experts and creative cluster managers** (through workshops, training programmes, etc.). Each of these groups of professionals would benefit from learning about the working practices and programmes offered by the others (e.g. someone providing innovation support to technology companies may well be interested in knowing how the manager of a music industry cluster helps music companies to source and develop new talent, etc.).

3) Improve the creative industries' innovation capability and investment readiness

- Investment readiness depends on the ability to **attract investors**. Larger companies rely on the innovation capacities of smaller ones to discover new ideas and new talents. This is an important feature of the CIs. These companies should be invited to act as "mentors" or "business angels" for CIs by helping them getting closer to the market needs. A European policy initiative could facilitate the setting up of schemes in order to facilitate the links between larger companies and the CIs.

- In order to tackle the issue of access to funding, the **establishment of a "Creative industries bank"** specialised in financing (or in supporting the financing of) projects based on investment into innovation support mechanisms to the benefit of CIs could be considered. To do so, the European Investment Bank (EIB) could play a role because of its experience in managing risk with other financial institutions in the innovation sector. Financial institutions specialised in the creative sector (such as the IFCIC23 in France or the Audiovisual SGR24 in Spain), private banks (such as Ingenious in the UK25) and regional banks have also expertise which is often too focus on national activities.

4. Other potential outcomes

• Such support could, for example, be provided through the **creation of information desks** in Member States that could be associated with national Chambers of Commerce. Such “Creative industries desks” could be created following the examples of “media desks” for cinemas.

• **Studies** could be commissioned in order to provide CIs with better knowledge on some strategic issues, such as consumer behaviour online.

• **Academic research** concerning the creative industries has emerged as an important field of study in the past decade. However, research findings are not widely enough shared and research initiatives duplicate the knowledge they produce. Networking and knowledge exchange would also benefit this domain.

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INCUBATOR

INCUBATOR FOR CREATIVE INDUSTRIES

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INCUBATOR FOR CREATIVE INDUSTRIES

About Incubator

- Vision= Connect and Catalyse!
- Mission=An knowledge and inclusive society!
- Bussines Model=Open Incubation!
- Shareholders & Stakeholders=A multilevel governance model

Virtual Incubator

- Creative Ideas
- Virtual Space
- Virtual Bussiness Support
- Virtual Networking
- Quick Guides for Creative Industries NEW!
- knowledge intensive services

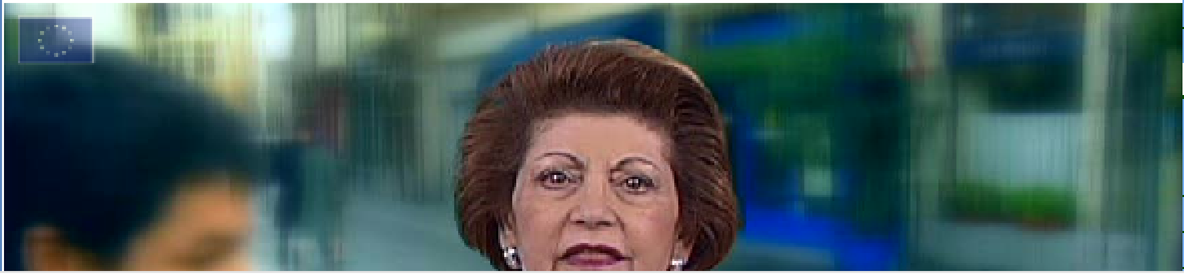
Techology Portal

- Technology Watch
- Creative Clusters
- Creative Industries

Η Επιτροπή ξεκινά δημόσια διαβούλευση σχετικά με το μέλλον των κλάδων του πολιτισμού και της δημιουργικότητας

Η Ευρωπαϊκή Επιτροπή ξεκινά σήμερα διαδικτυακή δημόσια διαβούλευση που στοχεύει στην απελευθέρωση του πλήρους δυναμικού των ευρωπαϊκών κλάδων του πολιτισμού και της δημιουργικότητας. Η διαβούλευση συνδέεται με μια νέα πράσινη βίβλο η οποία υπογραμμίζει την ανάγκη βελτίωσης της πρόσβασης σε χρηματοδότηση, ιδίως για μικρές επιχειρήσεις, ως μέσο για να δοθεί η δυνατότητα στον κλάδο να ευδοκιμήσει και να συμβάλει σε διατηρήσιμη ανάπτυξη χωρίς αποκλεισμούς.

«Οι κλάδοι του πολιτισμού και της δημιουργικότητας στην Ευρώπη δεν έχουν μεγάλη σημασία μόνο για την πολιτισμική πολυμορφία στην ήπειρό μας· αποτελούν επίσης έναν από τους πιο δυναμικούς τομείς της οικονομίας μας. Έχουν να διαδραματίσουν σημαντικό ρόλο στην προσπάθεια να βγει η Ευρώπη από την κρίση,» δήλωσε η κ. Ανδρούλα Βασιλείου, ευρωπαία επίτροπος αρμόδια για την εκπαίδευση, τον πολιτισμό, την πολυγλωσσία και τη νεολαία.



Internet

Incubator for creativ... | http://www.europe-... | Inbox - Microsoft O... | Microsoft PowerPoi...

Enterprise Europe Network - Hellas

The largest network of integrated business support in Greece

Member of the Enterprise Europe Network

PLACE PARTNER’S LOGO HERE

Why do SMEs need a new network?

Small and medium enterprises _ great importance

- 23 million SMEs in Europe = 99% of businesses
- 58% contribution to EU GP
- 75 million jobs created by SMEs

Small and medium enterprises _ need for substantial support

- Need for active and full scale support through regional business gateway
- Need for exploring new business and technological opportunities
- Need for contribution to the formation & improvement of EU SME-policies

_ Development of a network - mechanism to achieve Lisbon's goals of strengthening entrepreneurship and helping SMEs to find the most effective solutions for their problems

Enterprise Europe Network:

Europe's commitment to SMEs

- **550 local contact points in 44 countries** (EU 27, candidate countries, European Economic Area countries, other third countries)**, 3.000 experienced staff**
- **18 teams of experts** in different industry sectors from intelligent energy to nanotechnology
- Duration: **1/1/2008-31/12/2013**
- **320 million € community contribution, more than 700 million €** total budget
- **1.000 technology and business cooperation agreements** are expected to be carried out between 2008-2010

Modus Operandi

§ **Competitiveness and Innovation Framework Program:** CIP 2007-2013

§ Contribution to **Lisbon's Strategy** for Growth and Jobs

- Ø By supporting the improvement of the business environment
- Ø By enhancing competitiveness of European SMEs

http://ec.europa.eu/cip

The Power of Experience

The largest network of integrated business support based on the experience of the former Euro Info Centers (EICs) and Innovation Relay Centers (IRCs)

New organizations

Improved access and proximity for the SMEs:

“one stop shop - no wrong door” principles

Qualitative goals

- Promotion of the innovation and entrepreneurship to European SMEs
- Support for international business and export activity
- Support for international development of technology and knowledge
- Encouragement of SMEs to participate in the 7th Framework Program
- Establishment of the network on a local, national and international level
- Promotion of SMEs access to the formation of European policies

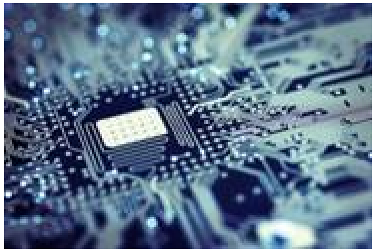
3 Policy Priorities:

- *The Small Business Act (SBA) for Europe*
- *The Broad-based innovation strategy for the EU*
- *The sustainable industry policy*

Enterprise Europe Network - Hellas

Services

1. *Information, feedback and international business cooperation services*



2. *Innovation, Technology and knowledge transfer services*

3. *Encouraging SME participation to the FP RTD programme*

1. Information, feedback & international business cooperation services

- ü *Awareness and Information services to local business on EU affairs as well as proactive promotion of EU Programmes, Initiatives and financial instruments*

- ü *International business cooperation services to clients (matchmaking)*

- ü *Services to the Commission for legislation and policy testing through SME feedback, impact studies and interaction with local business*

2. Innovation & Technology Transfer

- *Awareness and information on innovation and transnational technology transfer legislation and programmes*
- *Dissemination and exploitation of research results*
- *Technology Transfer Brokerage services*
- *Innovation stimulation to SMEs*
- *Linkage to other Innovation services (finance, IPR, innovation management)*

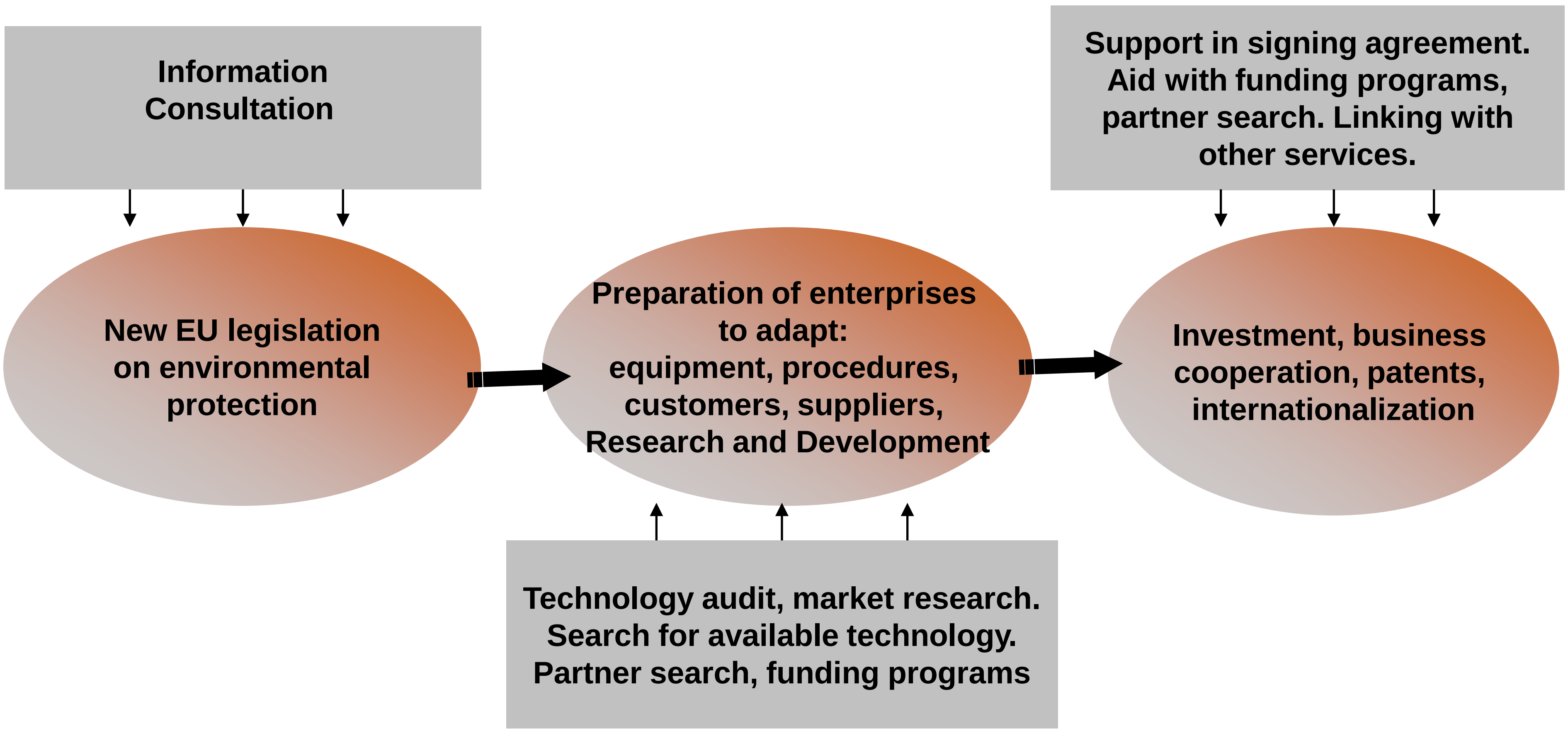
3. Encouraging SME participation to the 7th Framework Program

ü *FP RTD programmes information and awareness services*

ü *Assistance in RTD proposal preparation and coordination*

ü *Detection of needs and goals of SMEs in RTD issues and search for companies for participation in research proposals*

An ideal example of integrated support



Tools - Activities

- European electronic databases
- EU Legislation monitoring
- Publication of studies and reports
- Organization of groups to test new legislation
- Information campaigns, meetings, electronic and printed newsletters
- Company visits
- Technological knowledge
- Organization of and participation in seminars
- Organization of and participation in international events
- Personalised service benefits, helpdesk
- Organization of incoming and outgoing business missions
- Support of clusters

www.enterprise-hellas.gr

Business support at your doorstep

Creative_Industries_

Porto, 15-16 June 2010

Enterprise Europe Network partners study mission

adi agência de inovação

network enterprise europe

Creative Industries – Study Mission

- **Host** - Agência de Inovação (ADI)
- **Dates:** 15-16 June in Porto, Portugal.
- **Objectives**
  - To present the creative industries sector in Porto region
  - To foster collaboration opportunities (technological/business partnerships and EU projects)
  - To increase networking between EEN participants (development of common projects, company missions and brokerage events)
- **Program**
  - Visits and presentations by important actors (incubators, urban rehabilitation organizations, clusters, museums, and companies.

Creative Industries – Study Mission

Agenda (draft) 15 June 2010

- **Presentations**
  - **ADI / Enterprise Europe Network Portugal**: Welcome greetings
  - **Malayka Cinemas**: The film market industry in Portugal and the cinema Nun´Álvares case study
  - **ADDICT**: The creative industries Cluster in Porto
  - **SRU**: The role of urban rehabilitation in the creative industries sector
  - **UNICER**: The private sponsoring of creative industries
  - **Hard Rock Club**: 1st place of the Creative Industries Award 2009
  - Winner 2010: 1st place of the Creative Industries Award 2010
- **Lunch**
- **INSERRALVES Creative Industries Incubator**
  - Presentations from incubated companies
  - Guided visit to the Porto Museum of Modern Art

Hello Digital 2010

20-22 October, 2010

Proposal for EEN brokerage event for the Creative Industry sector

HELLO BIRMINGHAM 2010 DIGITAL
Celebrating Digital, Enabling Change
Conferences and Events

Advantage West Midlands
www.advantagewm.co.uk

What is 'Hello Digital' week?

- This is the overall umbrella, portal and promotional arm for the 2010 digital conference and events.
- It encompasses **'Say Hello'** a public programme of activities**; 'Hello Business'**, SME events, surgeries and a national conference and **'Hello World'** – the national and international public sector events (Eurocities, Business transformation Local Government Day & Beyond 2010).
- A series of linked events and activities designed to harness innovation, creativity and energy of the innovators and entrepreneurs as well as cross sector businesses keen to understand more about the opportunities of digital for new business.
- It will be a regional / national event attracting approx. 50% from outside of the region with an expectation to attract around 500 delegates over the course of the 20th/21st with representation from across all sectors. Job titles of those attending 2009.

Celebrating Digital, Enabling Change
Conferences and Events

www.advantagewm.co.uk

Business Support on Your Doorstep

Hello Digital – activities for the Creative Industry sector

- **Thursday 21 October - venues in the heart of the Birmingham's creative quarter**

- ½ day conference targeted at the innovators, entrepreneurs and SMEs from the digital media industry and Creative sectors to then be followed by a SXSW (South by South West) networking event.

- The focus will be on future gazing (visionary and inspirational), sharing success stories, tackling emerging issues through debates and technical discussions, identifying and stimulating opportunities for collaboration.

- The SXSW evening event will enable further discussion, networking and collaboration in an informal setting.
  Shuttle buses will be provided to facilitate use of the different venues which will also be used positively to showcase the creative sector of Birmingham.

HELLO BIRMINGHAM 2010 DIGITAL
Celebrating Digital, Enabling Change
Conferences and Events

Advantage West Midlands
www.advantagewm.co.uk

enterprise europe network
Business Support on Your Doorstep

Suggestions for possible activity

- EEN sponsored and organised ‘networking’ and ‘brokerage’ events between 20th and 22nd of October.
- Possible company visits with creative industry companies, cluster groups and other bodies to be organised within UK regions represented by EEN C.I SG partners

Creative Industries in the South East Europe

Case Studies

- Malta Creative Industries
- UK Creative Manifesto
- Cultural and Creative Industries in Rural Finland through Structural Funds