envision

CULTURE AND CREATIVITY SECTORS' ENTREPRENEURSHIP EMPOWERMENT IN THE DIGITAL ERA

IO1 REPORT

Intellectual Output 1

Mapping the needs and requirements of the CCS in the partner countries

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EXECUTIVE SUMMARY

This report has been developed as part of the Erasmus+ Project ENVISION - Culture And Creativity Sectors' Entrepreneurship Empowerment In The Digital Era. More specifically, it is the outcome of the IO1: Mapping the needs and requirements of the CCS in the partner countries.

With this report, we aim to identify the needs of the Culture and Creativity Sectors (CCS), that are among the most severely struck by the COVID-19 pandemic.

The findings will be used as a guide for the development of the ENVISION digital accelerator platform, which will provide CCS professionals with specialized digital tools and training courses.

To collect all the necessary information, a thorough research has been conducted, based on three autonomous but interconnected stages:

- Culture and Creativity Sectors (CCS) mapping reports
- Development and distribution of a questionnaire
- Experience engineering workshop

The results reveal that due to the severe impact of the COVID-19 pandemic on the industry, there is an urgent need for financial support mechanisms and community building. Therefore, the ENVISION accelerator platform shall include specific training courses and digital tools to address our target group's fundraising/sponsoring needs and networking challenges.

Moreover, information and communications technologies (ICTs) and social media are two areas that have been identified by our respondents as being very important for business development, and therefore require further attention.

Additionally, the findings highlight the lack of knowledge regarding the implementation of digital marketing tools, thus the ENVISION platform should focus on that training area as well.

Finally, the experience engineering workshop has led to valuable conclusions in relation to the optimal interface and options the accelerator platform should have.

BACKGROUND AND OBJECTIVES

The COVID-19 pandemic and its impact have been more than evident to many industries, regardless of size, region, and sector, and to many (if not all) states, regardless of size and geographical location. Apart from its direct consequences on human health and economies, the pandemic had some collateral effects, such as the forced automation and digitization of many processes. The Culture and Creativity Sectors (CCS) are among the hardest hit by the pandemic, as they did not keep up with these developments, despite several attempts to promote or to disseminate culture and forms of creativity digitally, throughout the lockdowns. Also, daily routines were severely altered: working from home and distance learning became a reality for millions of people in the EU, and, at the same time, the limitations of our digital preparedness, literacy and capabilities were revealed. So, there is an apparent gap to be bridged, between the CCS and the digital and digitized time and space.

This report is an output of the project ENVISION - Culture and Creativity Sectors' Entrepreneurship Empowerment in the Digital Era, which has as objectives to:

- Promote the recovery of the CCS sectors in the COVID-19 aftermath and enhance their resilience through the acquisition of valuable skills
- Promote an attitude change for the CCS and encourage participation and openness to the arts' industry
- Strengthen cross-border and -sector collaborations for the CCS
- Test new forms of organisation and management structures in CCS
- Facilitate knowledge exchange and culture-led innovation
- Improve business culture and boosting entrepreneurship
- Design of a digital toolkit providing information for cultural entrepreneurs, as a means of support of the recovery and re-development of CCS
- Promote novel and innovative initiative-taking in the CCS
- Recognise the important role of cultural entrepreneurship and enterprises to combat unemployment; develop and strengthen policies to increase knowledge on various aspects of culture entrepreneurship
- Increase the visibility of cultural entrepreneurship and develop tools for better understanding of the CCS (increase knowledge and promote various forms of culture and creativity).

METHODOLOGY

The first intellectual output of the ENVISION project aims to define the current situation regarding cultural entrepreneurship in the partner countries' ecosystems, identify the needs of professionals pertaining to the Culture and Creativity Sectors (CCS), and finally address those needs through the development of the ENVISION digital accelerator platform, which will provide our target group with specialized digital tools and training courses.

To collect all the necessary information and achieve the objectives mentioned above, the project's consortium developed a survey methodology that is based on three main building blocks. More specifically:

1. CCS ecosystem mapping reports; To describe the current situation regarding cultural entrepreneurship in the partner countries' ecosystems.
2. Questionnaire development/distribution; To collect information regarding the needs of professionals pertaining to the Culture and Creativity Sectors (CCS).
3. Experience engineering workshop; To define the specifications, options, and optimal interface of the ENVISION accelerator platform.

CCS cover a wide spectrum of activities, goods and services, and are extremely difficult to define. Therefore, the consortium decided to adopt UNESCO's definition of cultural domains. According to that definition, these are the following:

- Cultural and Natural Heritage; Museums (also virtual), Archaeological and historical places, cultural landscapes, natural heritage.
- Performance and Celebration; Performing arts, music, festivals, fairs and feasts.
- Visual Arts and Crafts; Fine arts, photography, crafts.
- Books and Press; Books, newspaper and magazine, other printed matter, library (also virtual), book fairs.
- Audio-visual and Interactive Media; Film and video, TV and radio (also internet live streaming), internet podcasting, video games (also online).
- Design and Creative Services; Fashion design, graphic design, interior design, landscape design, architectural services, advertising services).
- Intangible Cultural Heritage (transversal domain); Oral traditions and expressions, rituals, languages, social practices).

These domains are considered to be cultural. They also represent the minimum set of core cultural domains for which UNESCO would encourage countries to collect comparative data. This allows for a specification of the breadth of the cultural sector but also gives a sense of its structure.

Based on the domains defined above, ENVISION's target groups are:

- CCS professionals (freelancers, business owners, business leaders, managers, employees, interns, etc.)
- CCS Small-Medium Enterprises (SMEs) and start-ups, and individual entrepreneurs.
- Students and researchers in various cultural-art fields.
- Everyone interested in the services of the virtual accelerator for the CCS.
- Cultural organisations wishing to adopt new and innovative ways of offering cultural products and/or services.
- All stakeholders that can be actively involved in the project's implementation and development as well as to the transmission of its ideas.

CCS ECOSYSTEM MAPPING REPORTS

To describe the current situation regarding cultural entrepreneurship in partner countries, each partner developed a CCS ecosystem mapping report of their respective country (Annex II). This stage of the research was extremely important as it gave us insight on the structure and organization of the local CCS ecosystems. Having knowledge of the general context, helps us better identify, access, and support the needs of the professionals pertaining to these sectors.

In order to gather all the necessary data and statistics, each partner had communication (emails, online meetings, telephone conversations, etc.) with CCS stakeholders in their respective country. These stakeholders include municipalities, public institutions, private associations, organisations and NGOs, individual professionals, museums, creative agencies, cultural agencies, cultural-social associations, consultancies, music schools, voluntary and social promotion associations, theatre associations, etc.

The five CCS ecosystem mapping reports that have been developed in the context of the ENVISION project are the following:

Italy

Description of local ecosystem

Introduction

This report contains data and statistics taken from the “Io sono Cultura report” which is the in-depth study and research carried out by many institutional actors and coordinated by the Fondazione Symbola and Unionamere with the support of the Study Centre of the Chambers of Commerce and Industry. The aim, as is well known, is to bring out a more productive vision of cultural and creative phenomena, conceiving the sector as a real economic segment capable of producing wealth and jobs and able to respond to the productive physiognomy of Italy.

This study is all made possible by the sectoral perimeter of economic activities.

The activities that fall within what is defined as the **Cultural and Creative Productive System** is the set of parts of activity which, at the finest possible sectoral detail (fourth digit of the atheist classification) participate in the definition of the supply chain. These activities, which can be defined as strictly cultural and creative (core), have been organized into seven macro-domains.

- Architecture and design
- Communication
- Audiovisual and music3
- Ideology and Software
- Publishing and press
- Performing arts and visual arts
- Historical and artistic heritage

In addition, to the strictly cultural and creative activities we must add the identification of all those economic activities which, although not operating directly in the cultural and creative and creative sectors, contribute to the cultural and creative enrichment of the country by employing professional profiles characterising the sector.

These activities, at least indirectly, are encompassed within the concept of **creative driven**, i.e. a meta-sector of activities formed by all cultural and creative professionals working in **non-core** sectors. A clear example of this is the designer working in the automotive industry or the filmmaker working in the fashion industry, this component can be estimated by crossing sectors on a second perimeter.

This component can be estimated by cross-referencing the sectors with a second boundary, this time relating to cultural and creative professions. The intersection between sectors and professions, borrowed from the "Creative trident methodology", devised by Higgs, Cunningham and Bakhshes and used for the first time within the Nesta's famous report, allows us to identify how many cultural and creative professionals are distributed across the non-cultural and creative sectors and thus estimate the share of employment and cultural wealth produced by activities not directly related to the cultural and creative perimeter.

In conclusion, about the loss generated by the COVID-19 pandemic, we can define that the Italian Cultural and Creative Productive System has suffered more from the negative effects of the health crisis than the rest of the Italian economy. The wealth produced by the sector fell by -8.1% compared to a national average of -7.2%.

The employment also fell considerably, with a change of -3.5% (-2.1% for the Italian economy as a whole). Despite the difficult year, the cultural and creative sector remains central within the national production specializations, thanks to the € 80.6 billion of added value produced and just under 105 million people employed. Values that represent the 5.7% and 5.9% respectively of the total value of the Italian economy and a multiplier capacity of 1.8 (for every 1€ produced generates 1.8 in the rest of the economy), which rises to 2.0 for the historical and artistic heritage and 2.2 for the Creative Industries.

Production System: Cultural and Creative status, added value and employment

The estimates of national accounts for 2020 paint a picture of the contribution of the Cultural and Creative Production System to the country's annual economic growth. In fact, looking at the two components of the supply chain as a whole, the core and the creative driven one, an added value of about 84.6 billion euros emerges.

Compared to the previous year, due to the pandemic crisis, the entire supply chain suffered a major contraction of -8.1%, even greater than the already 8.1%, and even more than the already severe -7.2% drop recorded for the Italian economy as a whole. In absolute terms, the reduction was close to EUR 7.5 billion compared to what was observed for 2019.

In spite of the downsizing, the contribution of the Cultural and Creative Productive System to the creation of wealth in the country remained almost stable at the share for 2019, at 5.7%.

Of the 84.66 billion euros produced by the supply chain, 46.6 billion euros related to the 37.9 billion in the meta-compartment of creative driven activities.

Compared to 2019, core activities reduced their share of the total supply chain by 0.7 percentage points, from 55.9% to 55.2%. Creative driven activities, on the other hand grew from 44.1% to 44.8%, in line with a trend that has been underway for several years that sees a process of cultural and creative contamination becoming more and more established in companies and creative contamination in companies and markets that are far removed from those typical of the supply chain. The slight contraction in the weight of the core component can also be seen in the total economy (from 3.2% in 2019 to 3.1% in 2020, while creative-driven activities are substantially stable at 2.5% after years of sustained growth. More graphically, this can be seen in figure 1:

	Added value	Employment
Million €	84.602,6	
Employed		1.445.600
% of total economy	5.7	5.8
% respect the 2019	-8.1	-3.5

Figure 1

The year 2020 marked a decisive step backwards for the industry on the labour front. After years of growth, the number of people employed in the Cultural and Creative Productive System fell, after having reached almost 1.5 million in the previous year. The contraction is equal to more than 52 thousand jobs, set the sector back ten years, with an overall value of 1.445.600 workers) similar to that of 2011.

Again, the relative change (-3.5%) was worse than the country as a whole (-2.1), with an even greater difference attributable to the higher number of atypical contracts, which are known to be more exposed to the winds of the crisis.

Nevertheless, the contraction on the employment front was less pronounced than that estimated for added value, and this is mainly due to the extraordinary measure of freezing redundancies that has characterized the whole of 2020, lasting beyond half of 2021.

Employment in the cultural and creative sector is divided into 821,000 core and 62,000 creative driven.

In terms of employment, the shares also clearly changed compared to 2019, with core sectors disadvantaged (from 57,6 in 2019 to 56,8 in 2020) and creative driven activities increased from 42,2 to 43,3).

Cultural and creativity sector specific fields and trends.

Looking more specifically at the composition of the added value of the supply chain, the video games and software sector makes the largest contribution, with 13.6 billion, or 16.1% of the entire sector and 0.9% of the entire economy as a whole. This is the only sector to have recorded a growth in terms of value added compared to 2019. Next, despite a contraction that started well before 2020, is the publishing and printing sector, with a value generated in the last year of 10.9% of the total economy. generated in the last year of €10 billion, or 11.8% of total SPCC and 0.7% of total value added. 11.8% of the total SPCC and 0.7% of the entire national added value. Together, these two sectors account for more than a quarter (27.9%) of the country's total SPCC. In terms of added value produced, the architecture and design sector follows (6.7 billion (0.5% of the total economy). the audiovisual and music sector (5.2 billion), 0.4%); the communication sector (4.5 billion). (4.5 billion) 0.3% and performing arts and visual arts (3.9 billion).

Finally, the sector relating to the management and enhancement of the country's historical and artistic heritage and artistic heritage of the country, with an added value produced in 2020 of 2.4 billion, equivalent to 0.2% of the total economy).

On the employment front, as for 2019, in first place the number of jobs generated is still publishing, with almost 195,000 workers. A value of 13.5% of the total sector and 0.8% of the country's total employment.

Unlike the added value, the video games and software sector are in second place in terms of value added. In contrast to value added, the video games and software sector occupies second place in terms of jobs. With 168,000 employees, accounting for 11.6% of the entire Cultural and Creative Production System and 0.7% of the total economy. It should also be stressed that, although this sector is in terms of added value produced, it has not been able to do the same on the employment front, where the number of people employed in 2020 was lower than in 2019. As in all the other sectors analyzed, the publishing and printing and video games and software sectors together account for a quarter of the total value added in CCS (25.1%) . This is followed by architecture and design, with 147,000 jobs in 2020 and a share of total CCS of 10.2% (0.6% of the total economy). We can see this data in figure 2.

	Added value			**Occupation**		
	Absolute values in millions	**In % on the total ccs**	**In % on the economy**	**Absolute values (x thousand)**	**In total on ccs**	**In total on the economy**
Architecture and design	6.774	8.0	0,5	147	10.2	0.6
Communication	4508	5.3	0.3	109	7.5	0.4
Music and audiovisual	5270	6.2	0.4	55	3.8	0.2
Video Games and software	13.641	16.1	0.9	168	11.6	0.7
Publishers	10.014	11.8	0.7	195	13.5	0.8
Performing arts	3.979	4.7	0.3	95	6.6	0.4
Historical and artistic heritage	2.482	2.9	0.2	53	3.7	0.2
Culture core	46.668	55.2	3.1	821	56.8	3.3

Creative driven	37.935	44.8	2.5	624	43.2	2.5
TOTAL CCS	**84.603**	**100.0**	**5.7**	**1446**	**100.0**	**5.8**

Figure 2

The effects will be long-lasting due to the combination of several factors

The effects of the crisis on distribution channels and the decline in investment in the sector will affect the production of cultural goods and services and their variety in the months, if not years, to come. In the medium term, the expected decline in international and domestic tourism, the drop in purchasing power and the reduction in public and private funding for art and culture, especially at the local level, could further amplify this negative trend. In the absence of responsive public support and recovery strategies, the downsizing of the cultural and creative sectors will have a negative impact on cities and regions in terms of jobs and income, levels of innovation, citizens' well-being and the vibrancy and diversity of communities.

The crisis has exposed the structural fragility of some producers in the sector

The cultural and creative sectors are largely composed of micro-enterprises, non-profit organizations and creative professionals that often operate on the margins of financial sustainability. Large public and private cultural institutions and companies depend on this dynamic cultural ecosystem for the provision of creative goods and services.

The sector has innovated rapidly, particularly with accelerated digitization…

Massive digitization, combined with emerging technologies such as virtual and augmented reality, can create new forms of cultural experience, dissemination, and new business models with market potential. With the lockdown, many public and private providers have moved content online for free to keep audiences engaged and meet the strong increase in demand for cultural content. The provision of free, digitally mediated cultural content is not sustainable over time but has opened the door to many future innovations. To exploit them, it is necessary to address the digital skills shortage within the sector and improve digital access outside large metropolitan areas, bearing in mind that digital access is no substitute for a live cultural experience and all the jobs that come with it.

… and the intersection of culture and the education or health sectors can drive future innovation.

Based on the impact of the COVID-19 crisis on both the education and the cultural and creative sectors, strategic complementarities can be developed. Both sectors have experienced accelerated digitization that brings new opportunities for local and regional development but also risks exacerbating inequalities without accompanying measures. Such measures concern, for example, the development of methodologies and technological solutions for distance learning with digitally mediated access to cultural resources and experiences.

Measures of social isolation and distancing have also highlighted the importance of art and culture for people's well-being and mental health, not least because of the increasingly documented psychosomatic effects of cultural access. This recognition offers a new opportunity to highlight the role of art and culture in the prevention and treatment of diseases throughout the lifespan, helping to provide solutions for health and welfare systems by also reducing hospitalization rates and drug use.

Cities and regions of Italy can harness the creative potential of culture in post-COVID recovery.

In the future, cities and regions will be able to consider the cultural and creative sectors and cultural participation as a factor with a social and economic impact. The sector is already an economic driver and source of innovation. In many cities and regions, specializations in the cultural and creative sectors are evolving and are being used to address competitive and social challenges from new angles, fostering resilience, skills creation and prosocial behaviour change. In recovery, there is an opportunity for dense metropolitan areas and remote and lagging areas to reconsider growth models that move away from large-scale, culture-based tourism and towards models that foster cross-innovation between CCS and traditional sectors and sustainable tourism. They can also enhance the role of culture in addressing the challenges of climate change and an ageing population. The contribution of culture can also be important in other areas of local development, from rebuilding public trust to contributing to post-pandemic urban design adapted to the rules of social distancing.

Policies that support the ecosystem

Mission 1 component 3, Tourism and Culture of the Italian NRP provides 4.275 billion for culture, in addition to 1.460 billion from the Supplementary Fund for investments of the Strategic Plan Major Cultural Attractions. These are significant resources in excess of the 2% of the Recovery Fund requested by the European Parliament, in view of both the role of the cultural and creative sectors and the enormous damage suffered as a result of the pandemic, an indication that has not been heeded by most Member States. Cultural and creative businesses can benefit from two types of interventions: indirect and direct. Indirect ones refer to a number of "generalist" programme that they can access even if they are not specifically targeted at the cultural sector, while direct intervention lines are grouped in measures with specific objectives, beneficiaries and budgets, as in the case of Measure 3 "Cultural and creative industries 4.0" - Capacity building of cultural operators to manage the digital and green transition. The aim of the session is to provide concrete contributions for the definition of objectives, contents, conditions of access and operational modalities, to ensure the compliance with the needs and requirements and the effectiveness of the interventions, starting from the outcomes of national and regional programmes and from the experiences gained in practice by cultural and creative enterprises and networks.

Mapping of the local ecosystem

Flagship events

Here find listed the major cultural and creative flagship events based on the popular classification made on Italian consumers.

1) Carnevale di Viareggio
2) Carnevale di Venezia
3) Memorial Marco Domenico Verdigi
4) Glasstress
5) Umbria Jazz
6) Lucca Comics & Games
7) Presepe vivente di Rivisondoli

8) Festa Unicorno
9) Taormina Film Fest
10) Venezia film festival
11) I-Days Festival
12) Presepi, mostra AISM
13) Body Painting Festival
14) Corsa dei ceri Gubbio
15) Fiera dell'Artigianato artistico della Sardegna Mogoro
16) Luminarie Larino - Magia di Luci
17) Regata Storica
18) Presepe di Pentema
19) Festival La Biennale di Venezia
20) Notte Della Taranta

Cultural Organizations

Cinema sector

- CINECITTÀ STUDIOS
- CSC - CINETECA NAZIONALE
- ISTITUTO LUCE CINECITTÀ
- Italian International Film
- Medusa Film
- Filmauro
- Rai Cinema

Music sector

- *Universal Music Italia*
- *Sony Music*
- *Warner Music Italy*
- *Believe*
- *The Orchard*
- *Artist First*
- *Indipendenti*
- *Sounday*

Art sector

- *CM09 - Channel Morbegno Aps. ...*
- *ShowDesk. ...*

- *APS VAGALUME ART. ...*
- *Associazione Altera. ...*
- *Mus-e **Italia** Onlus. ...*
- *Associazione **Culturale** Leonardo da Vinci. ...*
- *U Jùse APS. ...*
- *Associazione Lapis.*

Public cultural institutions

- MIBACT
- DIREZIONE GENERALE EDUCAZIONE, RICERCA E ISTITUTI CULTURALI – MIC
- ICCD - ISTITUTO CENTRALE PER IL CATALOGO E LA DOCUMENTAZIONE
- ISTITUTO CENTRALE PER IL PATRIMONIO IMMATERIALE
- ICAR - ISTITUTO CENTRALE PER GLI ARCHIVI

Public Universities

The following are the 10 best training centers for the cultural sector in base of the MIBACT classification of the year 2020.

- *Sapienza University of Rome*
- *Ca' Foscari University of Venice*
- *University of Siena*
- *Rome Business School*
- *University of Bologna*
- *Turin School of Development (International Training Centre of the ILO)*
- *University of Parma*
- *Politecnico di Milano*
- *Università degli Studi di Bergamo*
- *The American University of Rome*

Spain

Description of local ecosystem

The following is a mapping of the current situation of CCS in Spain. You can also see it more visually in the infographic (annex 1).

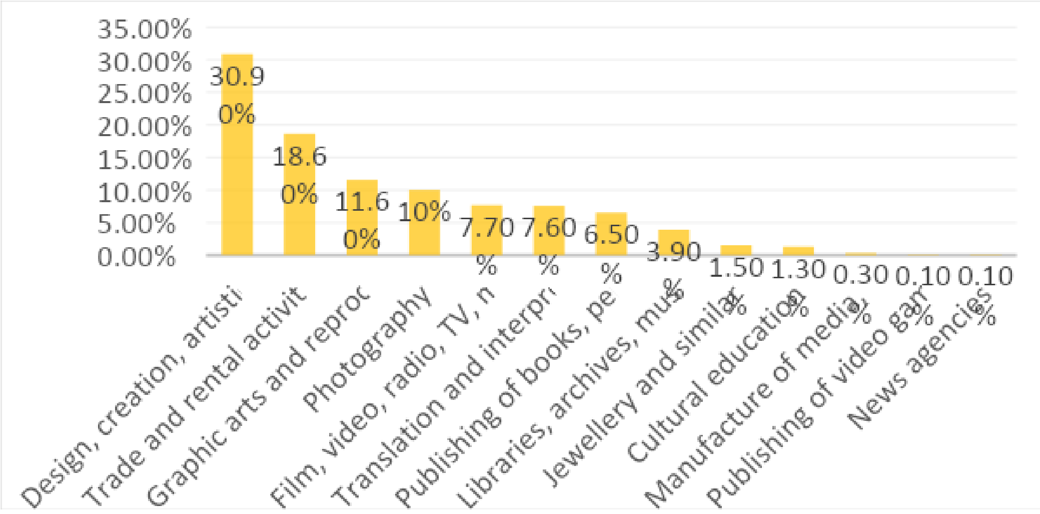
Key and most active industries

The most recent data from the Report on Policies for the Promotion of Cultural and Creative Industries (2019) are from 2017.

This report indicates the percentages of the key and most active industries, where the following cultural enterprises by activities stand out in descending order:

1. Design, creation, artistic and entertainment activities: 30.90%
2. Trade and rental activities: 18.60%
3. Graphic arts and reproduction of recorder media: 11.60%
4. Photography: 10%
5. Film, video, radio, TV, music publishing: 7.70%
6. Translation and interpreting: 7.60%
7. Publishing of books, periodicals and publishing activities: 6.50%
8. Libraries, archives, museums and other cultural activities: 3.90%
9. Jewellery and similar: 1.50%
10. Cultural education: 1.30%
11. Manufacturer of media, image and sound equipment and musical: 0.30%
12. Publishing of video games: 0.10%
13. New agencies: 0.10%

More graphically, this can be seen in figure 1:



Graphic 1. Key and most active CCS in Spain

Tech/digital & innovation performance numbers at country level

According to the Report on Policies for the Promotion of Cultural and Creative Industries (2019), the most popular digital consumption of Spaniards is music via online (30.6%), followed by reading in digital format (28.1%), concerts via the internet (11.7%), virtual visits to museums (5.7%) and performing arts shows via the internet (5.7%).

Also, the service or goods that Spaniards bought most online were tickets to shows (23.7%), books, magazines, and newspapers (including e-books) (12.2%), video games and their updates (6.9%) and films and music (6.9%).

However, several challenges are also identified in relation to new technologies in the CCS:

- Improved training of professionals in the sector in new technologies.
- Lack of skills and knowledge to cope with a process of digitalisation, incorporation of technology into processes, products, services, and daily work. Greater collaboration with the digital sector is required.

But it is also pointed out how the promotion of new technologies can bring opportunities for RBCs:

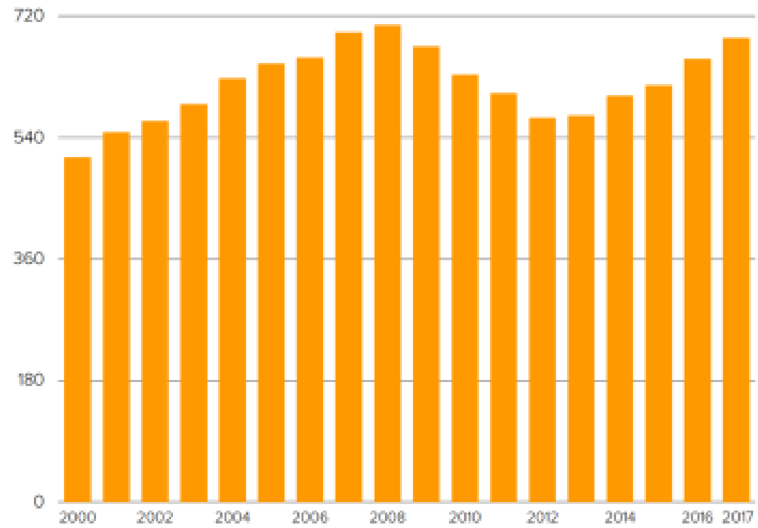
- Continuous renewal of business opportunities.
- Emergence of new formats, types of content and forms of distribution to the public

- New applications for existing products
- New opportunities for creative career development and visibility
- New ways of raising revenue (crowdfunding and online crowdlending)
- Easier access to the international market thanks to technology.

In short, the Spanish Government aims to promote the modernisation of the CCS through the full incorporation of new technologies, which will allow progress to be made towards a digital culture, with a commitment to the sustainability of this sector. In this way, the incorporation of transversal effects of creativity and cultural innovation in the economy will also be boosted.

Status of industry in question

According to the Report on Policies for the Promotion of Cultural and Creative Industries (2019), from 2000 to 2008, the CCS grew periodically. However, from 2008 to 2012, coinciding with the crisis situation in Spain, it decreased. Its recovery came gradually from 2014 to 2017. Thanks to the Cultural Industries report (2021), it is known that the trend in the creation of the CCS sector was positive until 2020, however, due to the Covid-19 pandemic, this sector was clearly negatively affected (see graph 2).



Graphic 2. Evolution of CSS (2020-2017)

In more detail, and according to the latest updated data corresponding to 2017, the CSS sector represents 3.6% of the total number of companies, totalling N=118,407. 64.7% of them have no employees (only the founder), 28.6% have 1-5 employees, 5% have 6-49 employees and only 0.7% have more than 50 people working in their entities.

In terms of the Spanish regions with the most CCSs, the first is Madrid, with 21.8% of Spanish CCSs, followed by Catalonia with 20.2%. This is followed by Andalusia with a total of 13.2% and the Valencian Community with 9.5%.

Policies that support the ecosystem

1. Recovery, Transformation and Resilience Plan. Revaluation of the cultural industry (2021)
2. Strategic Grants Plan 2021-2023 of the Ministry of Culture and Sport
3. Plan for the Promotion of the Cultural and Creative Industries
4. Policies for Creativity. A guide for the development of cultural and creative industries

Stakeholders

Each category could include an indicative list with the most notable or characteristic actors and short descriptions of them.

Startups

Startups related to the topic in question

1. Wave Application: has developed a free multi platform that allows you to locate and meet contacts in real time using a private map that can be shared for a limited time.
2. Lola Market: It allows you to buy online and decide where and when to receive the products purchased. It has been recognised as Best Startup at the E-Commerce Awards Spain.
3. Zapiens: Through quiz games, it helps other businesses that need to improve their knowledge, communication or training. It was the only finalist in the international event Pirates Summit held in Germany and winner in the B2B vertical of South Summit 2017.
4. Wallbox: this start-up promotes sustainable transport by offering fixed charging points for electric vehicles. It was positioned in 2017 as one of the best Spanish start-ups after being recognised by South Summit 2017.
5. Singularu: has designed a platform that connects jewellers and customers by diversifying its sales channels and increasing its turnover. In this way, it allows users to order personalised products from artisans.
6. Geoblink: provides geolocated information on the best location to open a business. It does this based on location data and provides demographic and economic information.

Most funded startups & major startup exits/acquisitions

1. Coinscrap**:** application that allows you to round up card purchases and automatically transfer the difference to a different savings product depending on the objective you want to achieve.

2. Dixper**:** allows video game and e-sports players to increase their monetisation by interacting with the audience and remotely connecting to a computer from a web browser to access the games located on it.

3. Alias Robotics**:** This startup specialises in the field of robotic cybersecurity, as it can analyse the behaviour of industrial robots, identifying malfunctions, external computer attacks or alterations to their 'blackbox', the black box that controls the operation of these robotic devices.

4. Heura/Foods For Tomorrow**:** its aim is to promote a dietary habit based on a 100% sustainable menu.

5. Tracer**:** a ticketing platform that aims to put an end to the unauthorised resale of major event tickets by giving rights holders the ability to decide whether their tickets can be resold and for how much.

6. Zeleros**:** a Spanish company developing the hyperloop, already considered the fifth mode of transport. Its focus on vehicle optimisation allows for a reduction in infrastructure costs.

7. Consentio**:** also known as "the Whatsapp of fruit and vegetables' '. It has been created to make transactions of goods and services simpler and easier to manage on a day-to-day basis.

Case studies

1. Grupo ICC Labs: started in the summer of 2020 due to Covid-19. In the midst of the pandemic, it has established itself as an incubator that has accelerated the digital transformation processes of public and private organisations, and whose mission is to become a decisive actor in this transformation.
2. TuriTop: Its product consists of reservation management systems in the cloud, so that customers (tourism companies offering pre-booked activities and services) generate savings by not needing specific software or hardware to be able to process all operations related to the booking of their services.

Incubation & Acceleration programs

1. Ship2B: This accelerator aims to promote social entrepreneurship and impact investment. They have the first and largest impact investment network in Spain.
2. Wayra: supports entrepreneurship and its main purpose is to promote newly created companies by offering them the appropriate training and the necessary financing channels.
3. Lanzadera: this accelerator launcher offers advice, training and financing to entities and places its 9,000-metre facilities at the disposal of entrepreneurs.
4. Minerva: proposes programmes in which there can be a maximum of 20 participants per call and they are accompanied throughout the process of launching and consolidating their business projects.
5. Bake250: its core values are creativity and innovation. The team participates in the projects as co-founders, contributing everything necessary to get them off the ground.
6. Startup Grind: works in more than 600 cities with a very demanding programme because you have to apply and have the right qualities to be accepted. Once you are accepted, you can benefit from exclusive partner matchmaking offers, free access to Startup Grind events in your city and much more.
7. Seedrocket: It is the first early-stage ICT accelerator in Spain, created in 2008 by a group of leading investors. They provide training, funding and advice to boost the development of startups, as well as a common workspace.
8. Innio: This accelerator specialises in defining business strategies for micro-enterprises and SMEs. They have different acceleration programmes tailored to the needs of each entrepreneur.

Fundraising

Venture Capital funds

1. Kibo Ventures: is one of the best known startup funds in Spain. They work for companies such as Cartodb, Captio, Minube, Sindelantal and Trip4real.
2. Bonsai Venture Capital : has historically been one of the most active on the Spanish scene. His investments include Softonic, Infojobs, Idealista, Wallapop and Gigas.
3. Alantis Capital: invests in the early stages of ambitious, high-growth projects. They invest between €50,000 and €500,000 with an active investor role and with the intention of accompanying their investments throughout their development.

4. Caixa Capital Risc: is Caixabank's venture investment fund. Through various specialised vehicles, we invest in the first rounds of capital (seed phase) and accompany them in the following stages, rounds A and B, if necessary.

Angel investors

1. Carlos Blanco
2. Elena Gómez Pozuelo
3. Javier Megias
4. Miriam González-Amezqueta
5. Vicente Arias
6. Luis Martín Cabiedes
7. Almudena Sainz de la Cuesta
8. Alejandro Suárez
9. Albert Armengol

Other public or private streams

Universities & Research Centers

1. University of Alcalá (UAH). It has a university master's degree in Cultural Management and Creative Industries.
2. Universidad Rey Juan Carlos: It has a Master's Degree in Creative Economy: management of Creative Industries + Sustainable Urban Transformation.
3. Miguel de Cervantes European University: Master's Degree in Management of Cultural and Creative Industries.
4. Universitat de Barcelona: It has a Master's Degree in Management of Cultural Institutions and Companies.
5. New technologies and the cultural and creative industries: a research project of the Valencian Institute of Economic Research.

Coworking/Maker spaces

1. UTOPICUS: Its pillars are personal focus - with sustainable, experiential spaces that nurture the community; culture - offering future-focused events, cultural programming and training; innovation - with pioneering technology services integrated into the spaces in a fully organic way; and community - we empower members to create meaningful connections.
2. DCOLLAB: meeting place for creatives, graphic designers, communication solutions designers, lifestyle editors, marketing consultants...
3. LOOM: Workplace of marketing consultants, data analysts, creatives and advertising experts.
4. COOL INQUIETO: Workplace for creatives, such as interior architects, translators, journalists and social educators, marketing companies, online communication and consultancies.

Competitions and Hackathons

1. Hackathon Vueling (2013)
2. Hackathon Google Analytics (2015)
3. Hackathon Telefónica (2016)
4. Hackathon «Arquithon» SEAT (2016)
5. Cybercamp Hackathon (2017)
6. Codemotion Madrid (2017)

Mass media covering the innovation ecosystem

Ticbeat: independent digital publication specialising in technology and innovation, its industry, its main trends and everything that surrounds these fields.

Startmeup: website that "inspires and motivates" entrepreneurs, creatives and innovators to carry out the projects and ideas they want to realise.

TechFood Magazine: meeting point for startups, entrepreneurs, investors and brands in the FoodTech, AgTech, WineTech and eCommerce sectors.

Toyoutome: blog coordinated by the PRISA Transformation team. The group promotes digital knowledge and innovative thinking

Flagship events

The Spanish Creative Industries Network offers the most important events in Spain about this sector:

1. Creative Business Cup spain
2. Foro de Inversores RIC

The Autonomous University of Madrid has also held virtual events on Cultural Industries:

The Government of Spain also holds events in this field:

1. The best Cultural Industries projects at the Ministry of Culture and Sport
2. IV Collaborative Conference of Managers of Creative Spaces

Other initiatives and programs

Additional programs that support the ecosystem

Municipality & other public initiatives

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The Subdirectorate General for the Promotion of Cultural Industries and Patronage promotes grants and scholarships for the promotion of the creative and cultural industries

1. **Aid for the modernisation and innovation of the cultural and creative industries**: To promote investment in the creation and dissemination of digital cultural content in products and services, increasing the quality of the legal offer of digital cultural content on the Internet and improving citizens' access to it.
2. **Grants for cultural action and promotion**:The aim is to modernise and professionalise the cultural and creative sector through the promotion of activities.
3. **Hispanex Grants**: a) To promote, in collaboration with foreign universities, research work and studies in the field of academic Hispanism. b) To facilitate the dissemination of current Spanish culture in these centres through specific cultural projects. c) To support and promote Spanish languages in the aforementioned centres. d) To support and promote the Spanish language in the centres referred to above.
4. **IBEREX Programme Grants**: Participation of Ibero-American professionals from the cultural sector in programmes organised as non-regulated training internships provided by specialised bodies and sectoral units of the Ministry of Culture and Sport.
5. **Formarte Grants**: Grants for training and specialisation in matters within the competence of the Ministry's cultural institutions.
6. **Culturex Grants**: Grants for practical training in cultural management for young Spaniards in cultural institutions abroad.
7. **Fulbright Grants**: 5 grants for the extension of artistic studies in the United States of America.

Corporate programs

1. Emprende programmes of Factoría de Industrias Culturales: they have entrepreneurship, incubation, acceleration and growth programmes.
2. Training programmes for the digital transformation, business management and entrepreneurship of cultural and creative enterprises in Spain, of the General Foundation for the Creation and Development of Enterprise (INCYDE).
3. Creative Industries Network: also serves as a design and growth programme for innovative companies
4. Programa de Emprendimiento en Industrias Creativas y Culturales, del Gobierno de Aragón

https://www.emprenderenaragon.es/paginas/programa-de-emprendimiento-en-industrias-creativas-y-culturales

Private <> public partnerships

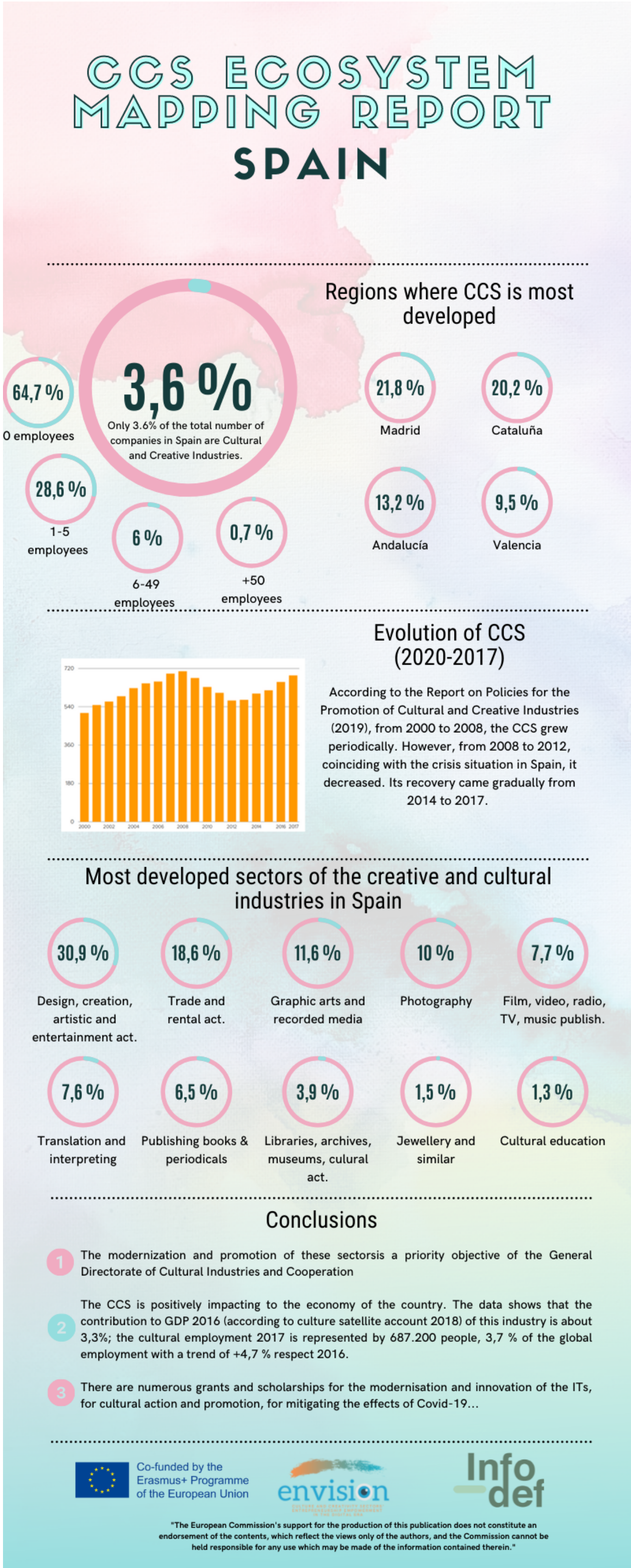
Institut Català De Les Empreses Culturals (ICEC). It is a public institution of the Department of Culture of the Generalitat de Catalunya created in 2000. It works for the development and consolidation of the cultural sector, promoting cultural companies and professionals in order to improve competitiveness and professionalism. It advises and accompanies cultural companies and professionals from different sectors: performing arts, visual arts, audiovisual, digital culture, books and music, and provides them with financial aid and tools, as well as services for internationalisation, business training and audience development.

Flagship ecosystem reports

State if there are any existing ecosystem reports available.

1. Report on Policies for the Promotion of Cultural and Creative Industries 2019

Annex


CCS ECOSYSTEM
MAPPING REPORT
SPAIN
3,6 %
Only 3.6% of the total number of companies in Spain are Cultural and Creative Industries.
64,7 %
0 employees
28,6 %
1-5 employees
6 %
6-49 employees
0,7 %
+50 employees
Regions where CCS is most developed
21,8 %
Madrid
20,2 %
Cataluña
13,2 %
Andalucía
9,5 %
Valencia
Evolution of CCS
(2020-2017)
720
540
360
180
0
2000
2002
2004
2006
2008
2010
2012
2014
2016
2017
According to the Report on Policies for the Promotion of Cultural and Creative Industries (2019), from 2000 to 2008, the CCS grew periodically. However, from 2008 to 2012, coinciding with the crisis situation in Spain, it decreased. Its recovery came gradually from 2014 to 2017.
Most developed sectors of the creative and cultural industries in Spain
30,9 %
Design, creation, artistic and entertainment act.
18,6 %
Trade and rental act.
11,6 %
Graphic arts and recorded media
10 %
Photography
7,7 %
Film, video, radio, TV, music publish.
7,6 %
Translation and interpreting
6,5 %
Publishing books & periodicals
3,9 %
Libraries, archives, museums, culural act.
1,5 %
Jewellery and similar
1,3 %
Cultural education
Conclusions
1
The modernization and promotion of these sectorsis a priority objective of the General Directorate of Cultural Industries and Cooperation
2
The CCS is positively impacting to the economy of the country. The data shows that the contribution to GDP 2016 (according to culture satellite account 2018) of this industry is about 3,3%; the cultural employment 2017 is represented by 687.200 people, 3,7 % of the global employment with a trend of +4,7 % respect 2016.
3
There are numerous grants and scholarships for the modernisation and innovation of the ITs, for cultural action and promotion, for mitigating the effects of Covid-19...
Co-funded by the Erasmus+ Programme of the European Union
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"The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein."

Cyprus

Statistics

Cultural and creative sectors (CCS) in Cyprus are amongst the top priorities of the national cultural policy and a number of regulatory frameworks, laws, policies and strategies have been adopted to support and promote them. An abundance of data and statistics demonstrate the major impact of CCS on almost every aspect of socio-economic life. More specifically:

According to the fourth edition of *Culture Statistics - 2019 edition*, published by Eurostat, cultural employment in Cyprus represented 3,5% of total employment in 2018. Despite the fact that there has been an increase in the relevant rates between 2013 and 2018 (3,3% in 2013), the rates are still below the EU-28 average (3,8%).
Moreover, when measured by their contribution to the non-financial business economy's value added, the relative importance of cultural enterprises in Cyprus (4,5%) was above the average for the whole of the EU-28 (2,7% in 2016).
Additionally, Cyprus with 3,1% was among the top five EU Member States with higher rates, regarding the turnover from cultural enterprises, which accounted for 1.7 % of the total turnover generated within the EU-28's non-financial business economy in 2016.

Furthermore, according to the 2020 quadrennial periodic report, which was conducted in the context of the UNESCO Convention on the protection and promotion of the diversity of cultural expressions, the share of cultural and creative sectors in Gross Domestic Product (GDP) was 0,5% in 2018, while the share of employment in the CCS was 3,4% in 2019 (a slight decrease of 0,1% compared to 3,5% in 2018). Finally, the total public budget for culture (in USD) reached the amount of 104,800,000USD in 2018.

The Statistical Service of Cyprus (CYSTAT) provides the following information regarding the total employment in the Arts, Entertainment and Recreation sector in the years 2008-2018 and 2020. Moreover, it reveals specific information for each of the five main cities (Nicosia, Ammohostos, Larnaka, Limassol, Pafos), as well as separate numbers for self-employed and employees in the sector.

EMPLOYMENT BY ECONOMIC ACTIVITY (Total), 2008-2018											
Economic Activity	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Arts, Entertainment and Recreation	4290	5313	7258	7659	6155	4775	4892	5778	6498	6784	6649

EMPLOYMENT BY ECONOMIC ACTIVITY AND PLACE OF RESIDENCE (Total), 2020					
Economic Activity/Residence	1st Trimester	2nd Trimester	3d Trimester	4th Trimester	Yearly average
Arts, Entertainment and Recreation **TOTAL**	7596	6866	7055	6940	7114
Arts, Entertainment and Recreation **Nicosia**	2555	2163	2616	2334	2417
Arts, Entertainment and Recreation **Ammohostos**	533	461	335	369	424
Arts, Entertainment and Recreation **Larnaka**	1031	1046	1076	1140	1073
Arts, Entertainment and Recreation **Limassol**	2539	2327	2188	2354	2352
Arts, Entertainment and Recreation **Paphos**	939	870	840	744	848

ARTS, ENTERTAINMENT AND RECREATION (Total), 2020					
	1st Trimester	2nd Trimester	3d Trimester	4th Trimester	Yearly average
Self-employed 2020	1510	1403	1359	1787	1515

Employees 2020	6086	5463	5696	5153	5600

Description of the local ecosystem

Cultural policy in Cyprus operates in a rather centralised model of approach, as the Ministry of Education, Culture, Sport and Youth (MOECSY) constitutes the principal decision maker and a number of other ministries and semi-governmental bodies have a certain degree of responsibility for various cultural issues. According to the 2019 annual report of the MOECSY, the total budget of the Department for 2019 amounted to €16,002,071 (Regular and Developmental Expenditures).

As mentioned above, the responsibilities towards cultural policy are shared among several ministries, semi-governmental bodies and their respective departments and services. More specifically:

- Ministry of Education, Culture, Sport and Youth (MOECSY) - **Department of Cultural Services**.

  The first service of the MOECSY with exclusive jurisdiction over culture was established in 1965. Afterwards, it was upgraded to a Department in 1992, and renamed to "Department of Cultural Services". The Department is responsible for the expression and the implementation of the government's cultural policy in fields such as Literature, Books, Music, Visual Arts, Theatre, Dance, Cinema, Folk Culture, Museums, etc. Moreover, it facilitates the general development of Arts and Letters in Cyprus, assists the public in issues related to culture, promotes Cyprus' cultural activities abroad and plays a significant role in shaping the cultural identity of the country.

- Ministry of Transport, Communications and Works - **Department of Antiquities**.

  Established in 1935, it has under its jurisdiction the management of the archaeological heritage of Cyprus. Its main responsibilities include the conducting of excavations and archaeological surveys, the operation, organization and foundation of archaeological museums, as well as the conservation, rehabilitation, protection and promotion of the ancient monuments, archaeological sites and monuments of traditional architecture. The aims of the Department of Antiquities also include the use of ancient monuments and archaeological museums for educational and cultural purposes and for the development of cultural tourism. Conferences, lectures and exhibitions, both in Cyprus and abroad, are organized towards these goals.

- Ministry of Interior - **Department of Town Planning and Housing**.

  It is responsible for the protection and conservation of the urban architectural and cultural heritage, through the implementation of various regeneration projects.

- The **Deputy Ministry of Tourism**.

  It constitutes a transformation of the former Cyprus Tourism Organisation (CTO). Amongst its other responsibilities, it is also charged with the development and funding of activities which are related to cultural tourism.

A number of semi-state and non-profit organisations are also involved in cultural policy making.

More specifically:

- The **Cyprus Theatre Organisation** (THOC), which was founded in 1971, and falls under the supervision of the Ministry of Education, Culture, Sport and Youth. Its main aims and objectives are to promote dramatic arts in Cyprus, to cultivate theatrical culture, and to promote artistic relations between the theatre world of Cyprus with those of Greece and other countries. The Organisation is administered by a Board of Directors consisting of 9 members, appointed by the Council of Ministers.
- The **Cyprus Broadcasting Corporation** (CyBC), which was founded in 1953, falls under the supervision of the Ministry of Interior. Apart from its radio and television programmes, it also makes documentaries, films and recordings and organises competitions in the field of the arts.

- The **Cyprus Symphony Orchestra Foundation** (former Cyprus Symphony Orchestra, established in 1987), which was founded in 2006 by decision of the Council of the Ministers. Its main aims are the development and promotion of orchestral music, the improvement of musical life and education in the country, as well as the involvement of society in musical activities. In January 2007, the Foundation undertook the management of the State Chamber Orchestra and the State Youth Orchestra, (which were renamed Cyprus Symphony Orchestra and Cyprus Youth Symphony Orchestra respectively). The Cyprus Symphony Orchestra Foundation is a not for profit organization, managed by a Board of Directors made up of nine (9) members, and mainly sponsored by the Government, which covers all the expenses of the Foundation and the Orchestras.
- The **Cyprus Chamber of Fine Arts** (E.KA.TE), which was established in 1964, and operates as a non-profit association that represents professional visual artists. It is a member of the International Association of Art (IAA) and its primary aims are to promote artistic creation in all areas of fine arts and protect the rights of Cypriot artists. Around 400 artists from all over Cyprus are already members of E.KA.TE with the new members accounting to around 40 each year.

The lack of a structured approach towards cultural policy has led to actions concerning the establishment of a Deputy Ministry of Culture. In 29/11/2018, an interdepartmental working group, having thoroughly examined the structure and responsibilities of the Cultural Services, prepared a draft bill for the creation of a Deputy Ministry of Culture, including an organizational chart and a detailed description of the staff. The relevant documents were submitted for evaluation and processing to the Department of Public Administration and Personnel. Today, a bill for the establishment of the Deputy Ministry of Culture has been approved by the cabinet and will be discussed by the House. The Deputy Ministry will be solely responsible for matters of cultural heritage, such as antiquities and cultural activities in general, and will also introduce effective and targeted policies that will support and empower cultural professionals, creators and artists.

Policies that support the ecosystem

Support to artists is provided either directly, through the state funding system,or indirectly, through actions and measures that support artistic work, such as the purchase of works of art for the collection of the State Gallery of Contemporary

Cypriot Art, the promotion of Cypriot art abroad through the participation in international artistic events as is the Venice Biennale, etc.

More specifically, there are certain programmes available within the state funding scheme:

- subsidy programme for individual artists in the fields of letters, music, theatre, visual arts, folk culture / cultural heritage, dance and film
- subsidy programme for cultural agencies, organisations and foundations in the fields of letters, music, theatre, visual arts, folk culture / cultural heritage, dance and film
- subsidy programme for the cultural development of Municipalities and Communities

Other measures include but are not limited to:

Literature - Books

- Dissemination of Cypriot Literature Abroad
- Cultural Periodicals - "Subsidy for Periodicals of Cultural Content "
- Purchase of Publications for the enrichment of Cypriot and foreign libraries
- Grant-aid scheme for the translation of works by Cypriot literary writers from Greek into foreign languages
- Organization of Literary Events in Cyprus
- Funding of literary events in Cyprus and abroad and other expenses of literary societies under the programme "CULTURE" (2015 - 2020)
- Cultural Institutions Reinforcement Scheme for Promotion, Communication and International Networking and Cultural Funds Financing Plan for Operating Expenses
- State Literary Prizes

Music

- Funding of Bodies, Institutions, Artists and Music Composers for Musical Events in Cyprus
- Funding of Bodies, Institutions, Artists and Music Composers for Musical Events Abroad
- Funding for participation in music conferences and residency programmes abroad
- Funding of the "Pafos Aphrodite Festival" Organization
- Music publishing and co-organizing of events
- Center for Music Research, Innovation and International Networking

Visual Arts

- Acquisition of Artwork
- The State Gallery of Contemporary Cypriot Art (Majestic building)
- New State Art Gallery (SPEL)
- Establishment of the Museum of Contemporary Art in Cyprus (MOCA Cyprus)
- “58th Venice Biennale International Art Exhibition”
- Participation in the activities of the Association Internationale pour la Biennale des Jeunes Créateurs de l’Europe et de la Méditerranée (BJCEM)
- Funding of activities of Cypriot artists abroad (presentation of solo exhibitions, participation in established and ad hoc art events and participation in artist hosting programmes “residencies”)
- Funding for the Chamber of Fine Arts (E.KA.TE) and Other NGOs in the Visual Arts Sector
- Co-organizing exhibitions with other bodies
- Enrichment of public buildings with works of art
- Creation of the Lemba Cultural Village

Dance

- “Contemporary Dance Platform”
- “Contemporary Dance Festival of Cyprus”
- “Terpsichore Programme”
- Funding Dance Events in Cyprus and Abroad in the framework of the "Culture" Programme

- Grants for groups and individuals
- Support of Cultural Institutions for Promotion, Communication and International Networking Scheme
- “Summer Dance Festival by the Cyprus New Movement”

Cultural Heritage

- Funding and Support of the new CULTURE programme - ‘CULTURE: Sub-programme Folk Culture - Support activities for the preservation of the Intangible Cultural Heritage and Traditional Culture.’

Theatre

- “Ancient Greek Drama Festival 2019
- International Festival “KYPRIA 2019”

Cinema

- Support Film Production
- Participation in International Film Festivals
- Showcasing of Cyprus Cinema
- Incentives for Foreign Productions (Economic and Tax Mobilization Programme)
- 17th Cyprus Film Days International Film Festival, 2019
- Summer Movie Marathon 2019
- Funding of Cinema Clubs/Cultural Institutions
- Funding of activities of the Union of Directors of Cyprus aiming at vocational training
- 14th International Documentary Festival of Lemesos, 2019
- Development of Rural Cinema
- Cooperation with bodies and networks of the European Union

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Museums

- The Recognition of Private Museums and Museums of Local Authorities (Process and Conditions) Law
- "Plan for the Funding of State Sponsorship to Recognized Museums in Support of Development Activities (Activities, Projects and Programmes)"
- Housing of Letters and Arts

Mapping of the local ecosystem

The following constitutes a first indicative ecosystem mapping of the CCS in Cyprus. The list of stakeholders is not exhaustive.

Flagship events

- Kypria International Festival
- Cyprus International Film Festival - “Golden Aphrodite”
- International “Pharos” Chamber music Festival, Nicosia
- Street Life Festival, Limassol
- Ayia Napa Festival, Ayia Napa
- Pafos Aphrodite Festival, Pafos
- Larnaca Biennale, Larnaca
- ArtFest Cyprus, Protaras

Cultural Organizations

- Costas and Rita Severis Foundation - The Centre of Visual Arts and Research (CVAR)
- The Bank of Cyprus Cultural Foundation
- Cultural Center of Strovolos
- A. G. Leventis Foundation, Nicosia
- Cyprus Animation Association (CAA)
- Pharos Arts Foundation
- ARTos Cultural and Research Foundation
- ACK CREATIVE
- Atlantis Culture

Public Universities

- University of Cyprus - Cultural Center, Nicosia
- Cyprus University of Technology (CUT) - Department of Fine Arts, Limassol
- Open University of Cyprus - Postgraduate (Master in Arts, MA) programme "Cultural Policy and Development"

Private Institutes of Tertiary Education

- The Cyprus Academy of Arts (CAA), Limassol
- ARTE Music Academy, Nicosia
- Vladimiros Kafkaridis School of Drama, Nicosia
- Aigaia School of Art and Design, Nicosia

Museums

- The Cyprus Museum, Nicosia
- Pierides Museum - Bank of Cyprus Cultural Foundation, Larnaka
- NiMAC - Nicosia Municipal Arts Centre, Nicosia
- SPEL - The State Gallery of Modern and Contemporary Cypriot Art, Nicosia
- "Panos Solomonides" Center - Cyprus Theatre Museum, Limassol

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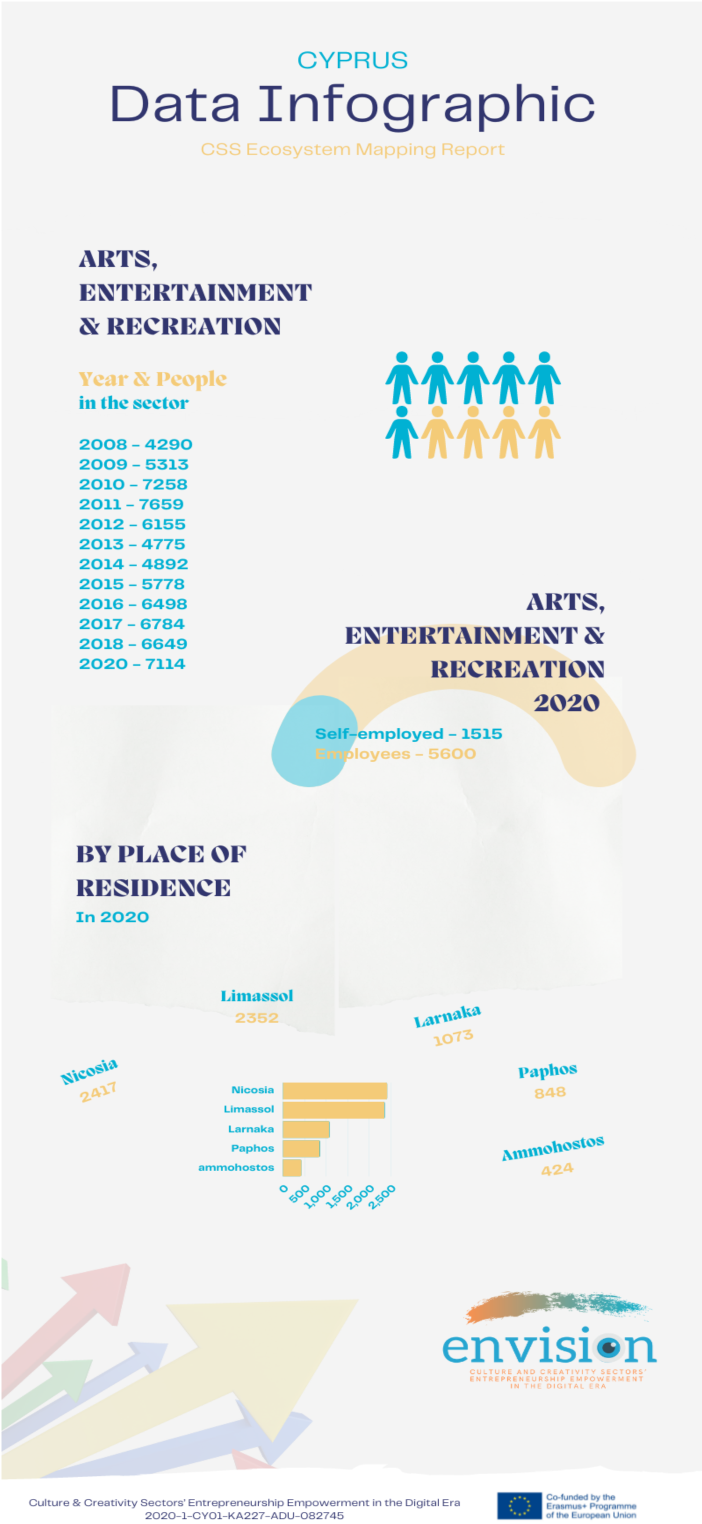

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Greece

Description of local ecosystem

Key and most active industries

The cultural and creative sector in Greece in 2014 employed 110,688 employees in 46,370 enterprises, which sold symbolic goods and services of about € 5.3 bn, with about € 2.1 bn added value for the Greek economy, and 1.4% contribution to the GDP (Graph 1). Respectively, in the EU-28 CCIs contributed in 2014, 2.8% (€ 353 bn) to the European GDP, through 1.7 mn enterprises that employed 6.1 mn employees.

The sectors contributing the most to added value are publishing (€ 371 mn), software publishing and computer programming (€ 297 mn), the audio-visual sector (€ 208 mn) and the television, radio, and communication sector (€ 203 mn). Despite the significant downfall observed cumulatively between 2008 and 2014, in 2013/14 the cultural and creative sector appears to be recovering with an increase in added value by 6.9% and a stability trend in the numbers of employees and creative enterprises.

The sectors of software and specialised design appear to have withstood the economic crisis, while in 2013/14 they increased their added value by 16.8% and 27.9% respectively. Other sectors that showed significant increase in added value in the period 2013/14 include the audio-visual (54.8%), libraries and museums (16.8%) and television, radio, and communication (15.7%) sectors.

The advertising and audio-visual, radio and television industries have the biggest output multipliers on all the Greek economy sectors. Thus, an increase in final demand by € 1 mn. for the products of audio-visual, television and radio industries will increase the total production in the Greek economy by € 1.4 mn., the gross value added by € 0,8 mn., labour income by € 0,4 mn., and will create 18.5 new jobs in the Greek economy.

Tech/digital & innovation performance numbers at country level

Greece's position on the Digital Economy and Society Index (DESI) for 2020 has dropped one place compared to the previous year and the EU average increase. For 2020, the country ranks second to last, in the 27th position out of the 28 EU Member States with Bulgaria ranking last.

Still, the overall score for Greece has improved from 35.1 in 2019 to 37.3 in 2020. Greece has demonstrated for the first time a major improvement in digital skills, with over 50 percent of Greek citizens claiming to have at least the basic digital skills. On Connectivity, the country has seen the progress of over 15 per cent compared to

2019. The signs of digitisation are there for Greece; however, the country needs to accelerate its digital growth, as it falls way behind the EU average.

Status of industry in question

Despite Greece's priority in the digitization of business, enterprises still struggle to implement the goals of digital transformation. However, Greek businesses share of electronic information sharing is above the EU average, while the use of social media fell sharply by 2 per cent in 2019.

There are some steps toward the digitalization of businesses, as there is some progress in providing digital services when someone wants to start a business. Furthermore, small and medium sized companies can benefit from the 14 digital innovation hubs covering some of the country's most critical sectors (agriculture, tourism, etc).

The introduction of new technological factors and the radical transformation of the means of production create possibilities for the emergence of new forms of productive activity, while they often rearrange the boundaries between the existing sectoral classifications, creating new areas of productive and technological development. For example, the technological sequences of advanced robotics, prosthetics, and the Industrial Internet of Things (Industrial IoT) are creating new forms of flexible customization, mass customization, and predictive maintenance (Eurofound, 2019), offering new possibilities for remote monitoring or digital display of production processes and products (eg business models structured "as a service", design and production of products using digital copies - "digital twins").

Respectively, the expansion of digital business models and their capabilities is rapidly transforming traditional industries such as transport, construction, real estate management, tourism, trade, creative industry, financial sector, urban development, etc.

In many professions of the creative and cultural industry, from the Graphic Designer to the Audio and Video Technician, from the Web Designer to the Digital Game Developer and from the Jewellery Designer to the Ceramicist, technological changes, of course in different ways and to different degrees, affect the necessary skills.

New software programmes and new design tools, such as digitizers and drawing tablets, huge databases (e.g. photo cases), 3D printing of test models, applications and virtual and augmented reality media dictate the need for upgraded and specialised digital skills, but also many modern social and business skills such as financial management of art projects, project management, search and fundraising, proposal writing, presentation and communication skills.

Policies that support the ecosystem

The COVID-19 pandemic brought to the surface structural issues that the Greek cultural and creative sector has been facing, due mainly to the recent financial crisis that the country went through:

1. Labour issues

· High percentage of undocumented employment; Multitude of labour models; and Unmapped industry.

· Intellectual property rights

· Limited ability of royalty collection societies to collect dues, especially from digital media; and High piracy rate.

2. Skills and education

Issues pertaining to the recognition of cultural studies degrees; Outdated business models (lack of business/digital skills); and Limited access to credit/funding (lack of fundraising/marketing/networking skills).

The above systemic issues exacerbated the impact of COVID-19, namely: Reduced revenue and additional expenses; Unemployment; and Inability for long-term planning. The government's response has been structured in three tiers: 1. Immediate response; 2. Mid-term response; and 3. Long-term response), which are discussed in detail below.

Immediate response

Certain relief measures were adopted specifically for the cultural and creative sector:

· Seasonal cultural workers were included in the list of beneficiaries. Special categories of cultural workers were also included (essentially the perimeter of beneficiaries has expanded, and the requirements have been further limited). As non-profit organisations were excluded from the horizontal support measures, yet a lot of cultural organisations are indeed non-profit, EUR 2.000 was given to each cultural non-profit organisation already registered to the Ministry's Registry of Cultural Organisations (over 600 organisations benefited)

· Measures to stimulate growth. In collaboration with the Ministry of Finance, the Ministry of Culture and Sports contributed EUR 15 million to support the cultural sector.

In addition, it undertook a series of measures per cultural field. Specifically:

Film and Cinema:

· Call for the development of short films and documentaries and animation films in collaboration with the Greek Film Centre (EUR 2.8 million)

· Acceleration of payments by the Greek Film Centre to motion pictures that are in the production stage

· Acceleration and simplification of the application process regarding funding proposals

· Extension of existing film production deadlines

· Emergency support of small arthouse cinemas that traditionally present mostly Greek and European motion pictures

Performing Arts:

· Increase of the funding earmarked for Municipal and Regional Theatres (EUR 100.000 increase).

· Doubling of this year's funding for theatre (totalling EUR 2.3 million) and dance (totalling EUR 1.1 million) calls for non-profit organisations

· Around EUR 1.2 million to for profit theatre companies that had to cancel their shows because of the lockdown

· Specific call for long-term dance research projects (EUR 120K) · Increase of the monetary amount of the National Theatre Play Awards

Visual Arts:

· Specific call for visual arts projects, including long-term research and interdisciplinary projects (EUR 640K)

· Support of art galleries

· Allocation of additional resources to state-owned museums of Contemporary Art for the acquisition of works by Greek visual artists, · Direct acquisition by the Ministry of Culture and Sports of works by Greek visual artists

Books - Music:

· Dissemination of a EUR 20 voucher for the purchase of books to all unemployed citizens up to 25 years old (approximately 65.000 beneficiaries, totalling EUR 1.3 million), in collaboration with the National Employment Service (OAED)

· Redesign of the Thessaloniki International Book Fair to increase its outreach and resilience

- Dissemination of EUR 1.3 million to regional authorities to fund music concerts across Greece

Design

· Specific call for design projects to promote the visibility of Greek design abroad (EUR 500K)

· Creation of a platform to include all Greek designers

· Call from the Archaeological Resources Fund for the design of products to be sold in the stores of state-run archaeological and cultural heritage museums

Digital

· Specific call for digital culture projects aiming at improving remote access of culture (EUR 800K)

· Specific call for video game development projects (EUR 300K)

In addition to the above:

· Additional grants were given to the cultural organisations supervised by the Ministry of Culture and Sports to enable commissions to Greek artists.

· Submission deadlines and completion deadlines for projects funded by the Ministry in 2019 for the 2019-2020 season were extended

· A bill passed to allow performing arts producers to issue vouchers to reimburse tickets of cancelled concerts and performances

· Measures to maintain citizens' access to culture during the lockdown

Developing alternative ways for citizens to access culture was a basic priority since the outbreak of the pandemic, since culture has proven to be the citizens' refuge. The Ministry of Culture and Sports has built a repository of cultural content, created by its own services and supervised organisations. It consists of material from the huge cultural reserve — monuments, museums, archaeological sites, publications — as well as contemporary cultural productions. These include digital tours of museum collections, online showing of performances, motion pictures and concerts, e-courses etc. The reservoir is continuously expanded with new material.

Furthermore, the Ministry of Culture and Sports — with the support of the Ministry of Digital Governance — introduced a new Cultural Platform, digitalculture.gov.gr, to inform and connect citizens with daily cultural happenings in Greece and abroad and hosting all aforementioned content.

Finally, as stated above, the Ministry issued a specific call for digital culture projects, especially those that enable remote access to culture.

Mid-term response

Reopening the sector after the lockdown

Reopening the cultural sector in a safe and sustainable manner was one of the key priorities. In collaboration with the national healthcare authorities, the Ministry designed a gradual reopening of cultural organisations and cultural education facilities, taking into account all necessary precautions and issuing respective protocols.

Furthermore, in order to promote the safe reopening of theatres and the commencement of the Athens and Epidaurus Festival, the Ministry of Culture and Sports and the National Theatre of Greece co-organised the first ever live streaming of a theatre play from the ancient theatre of Epidaurus, with the support of Google. The event was aimed at viewers outside Greece. Over 100.000 people from around the world joined live to watch Aeschylus' The Persians.

Additional growth measures

In addition to the measures to stimulate growth, the Ministry has taken a series of measures aimed at generating employment opportunities and supporting growth.

· Commissioning to state-owned cultural organisations a series of over 250 cultural events with the participation of cultural workers from the free market, over the summer period

· Reducing in collaboration with the Ministry of Finance the VAT of cinema tickets from 24% to 13%

· The Ministry of Labour has developed a program for 10.000 culture professionals, amounting to EUR 13m, using social and other criteria, following a point system.

· A cross-ministerial working group was formed on how to increase the capacity and improve the efficiency of royalty collection societies, and a series of relevant measures were adopted.

· The dynamic blocking injunction bill was expedited and passed, further combating piracy

· The Ministry of Culture and Sports is an active participant of the government discussion regarding the NextGeneration EU recovery programme, focusing on its cultural and creative industry dimension.

Long-term response

As stated above, the COVID-19 crisis has highlighted the structural reforms needed in order to increase the sector's resilience and competitiveness, and to protect its employees. These include:

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· Reforms related to labour relations and social security issues

· Tax reforms

· Further strengthening the protection of intellectual property

· Incentives to transition from grey to white economy across different cultural value chains

· Improvement of access to funding

· Reforms related to cultural education

· The inauguration and utilization of a new entity, Acropole Across, which aims at providing funding, skill building, networking, and marketing opportunities to members of the cultural and creative sectors

· Audience development strategies to increase the visibility of contemporary Greek cultural production both within Greece and abroad

· Utilization of technology to support innovative solutions for the production and dissemination of cultural works

· Strategies for the higher visibility of the sector as a key contributor both in Greek society and economy, as well as in the overall stance of Greece and the wellbeing of its citizens (hard and soft data).

Mapping of the local ecosystem

The following infographic constitutes a first indicative ecosystem mapping of the CCS in Greece. The list of stakeholders is not exhaustive.

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Co-funded by the Erasmus+ Programme of the European Union
FOUND.ATION
Culture Polis
GREECE'S CCS – A FIRST INDICATIVE ECOSYSTEM MAPPING
INCUBATION & ACCELERATION PROGRAMS
CapsuleTAccellerator
The Fashion Gate
ABCHub
SME's AND START-UPS
Moptil - Mobile Optical Illusions
Santorini Lost Atlantis
Bolt Virtual
EKOME
AddArt
COWORKING/MAKER SPACES
Romantso Bios
Officenter
Office12
Prelab
ΦΙΞ in art
MAKE
Creativity Platform
Athens Makers Place
Εργαστήριο ΠΟΙΩ
FUNDRAISING
Onassis Stegi – Onassis Foundation
Stavros Niarchos Foundation
Act4Greece
Latsis Foundation
Goethe-Institut Thessaloniki
COMPETITIONS & HACKATHONS
Onassis Stegi – Onassis Foundation (Onassis Prizes)
Crowdpolicy
MASS MEDIA COVERING THE INNOVATION ECOSYSTEM
culturenow.gr
art&life
ελculture
MUSEUMS
National Museum of Contemporary Art Athens
Thessaloniki Museum of Photography
Greek Film Archive & Film Museum Thessaloniki Cinema Museum
Silversmithing Museum
UNIVERSITIES & RESEARCH CENTERS
Ionian University
Department of Audio & Visual Arts,
Department of Music Studies
Athens School of Fine Arts
Department of Fine Arts
National and Kapodistrian University of Athens
Department of Theatre Studies
CULTURAL ORGANIZATIONS
Hellenic Foundation for Culture
The Stavros Niarchos Foundation Cultural Center
Onassis Cultural Centre
Telloglion
Hellenic Centre for Photography
Technopolis City of Athens
FLAGSHIP EVENTS
5th bio–Mechanical Festival
All Legends Festival
MIRfestival
Drama International Short Film Festival
Athens Epidaurus Festival
Thessaloniki International Film Festival
Cinema Festival
PROJECT NUMBER – 2020-1-CY01-KA227-ADU-082745
"The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein."

The Netherlands

Description of local ecosystem

Key and most active industries

Creative industry and ICT have proven to be drivers of economic growth during the boom period between 2015 and 2018. They are driving growth of jobs in the Netherlands. The number of jobs in the creative industry is growing in the period 2015-2018 with an average annual rate of 3.4 percent. That's twice the average annual growth rate of the entire economy. For ICT the average annual growth rate of 2.6 percent in those years. Together, both sectors now account for 7.7 percent of jobs in the Netherlands, the creative sector industry for four percent (344 thousand jobs), the ICT sector for 3.7 percent (320 thousand jobs).

From 2015, the growth in the added value of the creative industry has been at an average of 3.5 percent per year, one percent above the national average. The strongest growth is in creative business services and the arts and cultural heritage. The media and entertainment industry has turned from shrink into growth. Unlike in the previous period 2008-2015, the creative industries now connect job growth to value growth. The growth in value in the ICT sector has been above the national average for the past ten years and accelerates to 5.4 percent annual value added growth over the years from 2015.

Design is the fastest growing industry within the creative industry with a growth of more than twelve thousand jobs in the years 2015-2018. That's an average growth of no less than sixteen percent per year. At the interface of creativity and digital technology, a lot of innovation and growth takes place and this is particularly visible in the digital design and gaming sectors. Part of this growth is at the expense of other creative domains. So is the growth in advertising agencies (under the domain of communication) over the past period stagnated. This despite the economic boom with growing corporate marketing spend. Lots of marketing spend from companies are shifting to online and there the sector has to deal with new competitors. In addition to Facebook and Google, these are the digital design agencies and digital marketing agencies, which are often registered as ICT companies.

The small scale companies and self-employment are characteristic of the creative industry. With four percent of jobs on the national scale, the sector is responsible for 11.3 percent of the company locations. The independent entrepreneurs dominate, in particular within arts

and cultural heritage. The ICT sector is at 3.7 percent of the jobs and is responsible for 4.7 percent of the establishments. Unlike in the creative industry, the larger companies dominate within ICT with more than fifty jobs per company, on average. The scaling down in the creative industry and ICT has been levelling off in recent years. The reason is that the larger companies in both sectors, on balance, hire staff again and don't let them go, such as was the case previously for years.

Tech/digital & innovation performance numbers at country level

The ratio of the development in jobs to the development in added value shows the earning capacity of a sector. The creative industry and the ICT sector are following different paths. The earning capacity of the Dutch economy is stable in the years 2010-2013 and decreases from 2014 because the growth in added value is greater than the growth in jobs. The earning capacity of the creative industry decreased in the period 2008-2014. The number of jobs grows while the value produced decreases.

With more jobs, less is earned in those years. 2015 marks a turning point. From that year on, the creative industry has linked job growth to value growth. From 2017, the value grows even faster than the number of jobs and improves the earning capacity. This is largely due to positive developments within arts and cultural heritage and creative business services. Within the ICT sector, the switch to improving the earning capacity was previously made. In 2009 and 2010, the value of development saw a dip, while the number of jobs remains the same. From 2011, there has been a strong increase in added value without job growth. From 2014, the number of jobs is also growing, while the generated added value increases more. From 2016 the earning capacity is improving considerably.

With more than a hundred thousand jobs in the creative industry, Amsterdam is by far the most important creative industry and ICT city in the Netherlands. One in five jobs in the creative industry and one in ten jobs in ICT is to be found in the capital. At the same time, Amsterdam, with its sixteen percent of overall economy, has the largest share of jobs in creative industry and ICT in the Netherlands. The city thus links size to specialization. It is also striking that Amsterdam has the largest share of freelancers in creative industries and ICT together. The city turns out to be an excellent place for the creative network economy.

Utrecht, Rotterdam and The Hague follow as the most important cities for jobs in the creative industry and ICT with between 25 and 30 thousand jobs. Of the G4 cities, Rotterdam is the city that has experienced the strongest job growth in creative industry and ICT in the period 2015-2018. In 2018 in the Netherlands there were ten cities with more than ten thousand jobs in the creative industry and ICT together, in 2015 there were only seven. The urban concentration of both sectors is increasing. The city with the strongest specialization in creative industry and ICT is Hilversum with more than a quarter of all jobs in one of the two sectors. The city bases its specialization on its unique media cluster, concentrated at the Media Park.

Hilversum is seventh in the concentration of creative industry and ICT after G4, Groningen and Eindhoven. This is remarkable because Hilversum is only the 35th largest in terms of size out of all Dutch cities.

Amersfoort, Utrecht, Groningen and 's-Hertogenbosch have a relatively strong ICT profile, with more than six percent of the total number of jobs. ICT activities are more spread across the country, but there is a visible shift. The regional distribution of the ICT sector is shifting from the centre of the country to Amsterdam and Rotterdam. There you will find the strongest growth in the past decade. ICT in Amsterdam is growing annually with an average of 5.9 percent and Rotterdam with 4.5 percent. Also Haarlemmermeer (4.1 percent) and 's Hertogenbosch (3.8 percent) are growing strongly.

Status of industry in question

The focus on creative jobs in the broader economy, rather than on jobs at companies in the creative industry, opens a new perspective on value creation. Instead of assuming all jobs in the creative industry and the added value they produce, the emphasis is on the value creating effect of inputs from creative jobs in the other domains of the economy. They range from communication professionals within retail companies to designers in the manufacturing industry. By checking how the creative professionals take root within diverse companies and institutions it becomes clear what the need is for creative inputs in the society and how it is distributed.

Depending on the definition used, the number of active creative professionals in the Dutch economy varies from 417 thousand to 642 thousand, from 4.8 to 7.4 percent of jobs. By comparison, the number of jobs in the creative industry for creative and non-creative professionals together amounts to 344 thousand (four percent). It turns out that between forty and sixty percent of creative professionals working in the Netherlands, work outside the creative industry. The power of creativity is therefore greater than that of the creative industry alone. They are, as it were, embedded in other sectors, and that is why it is also called 'embedded creativity'.

With the further development of the creative economy the number of creative professionals who find employment outside the creative industry will be increasing rather than decreasing. There are therefore great opportunities for even better utilization of leveraging creativity for innovation in embedded creatives, the creative professionals working at companies and institutions outside the top sector. In addition to the power of crossovers from the creative industry to other sectors, also embedded creativity as a pacemaker of innovation is an important factor outside the creative industry. For the human capital agenda of the top sectors and the perspective that creative courses take on the future of the talent they train, this approach provides relevant leads. Future creative talent must be both prepared for work within the creative industry as well as in a multidisciplinary environment in other segments of the economy and society.

The Creative Industry Monitor and also the recently published Satellite Account culture and media 2015 (CBS, 2019) make the economic contribution of the creative industry, creative professionals, or cultural and media products to the economy and employment evident. Not all shapes of value creation are visualized when quantifying the economic contribution.

The value of creative production as a source of innovation and renewal remains over all underexposed. Within the creative industry, the concept of crossovers has been developed as the denominator for how the sector creates added value. In the recently formulated mission-driven innovation policy the crossover concept has been translated into a key role of the creative industry in the transitions needed to tackle major societal challenges to meet. The creative industry and the creative professionals have a set of tools and instruments for this, referred to as key enabling methodologies, which they combine with their signature creativity and imagination to initiate innovation processes. The stock concepts and methods it generates is the creative capital of the sector and a crucial resource from which innovation can be drawn.

The social value of creative production arises from the developing forward-looking ideas and concepts that contribute to a better functioning society. This can happen in specific, relatively concrete social practices, at the level of a neighbourhood or an institution, but also on a systemic level, by contributing to an inclusive or sustainable society. Besides the design sectors, the arts also fulfil an important role here.

Finally, the importance of the creative industry in cultural terms can hardly be underestimated. The products and services that come from professionals in the media industry, the design sectors, the arts and more, play a crucial role in identity formation, at the level of the country as a whole, of subcultures and also regionally and locally. They are leading in shaping our aesthetic culture and shaping public space. This also applies to the organization of the social debate. The creative industry is therefore of great importance to the functioning of our democratic system and other pillars of our society.

Policies that support the ecosystem

Dutch Design Foundation, Federatie Creatieve Industrie, CLICKNL and Centre of Expertise for Creative Innovation have joined forces in 'The Open Coalition'. The founders want to combine knowledge, skills and experience on how the Dutch cultural and creative industries can contribute better in solving hypercomplex societal challenges.

The challenges the world faces go beyond the nation's borders and call for creativity, solidarity and collaboration on a larger scale. That's why EU President Ursula von der Leyen calls for a "new European Bauhaus – a co-creation space where architects, artists, students, engineers, designers work together to make that (European renovation wave) happen."

World-class design education, extensive experience in policy making (16 years Creative Industries Key Sector, CLICKNL and Centres of Expertise Creative Industries), one of the most influential design events in the world (Dutch Design Week since 2002) and many more makes the Netherlands a partner not to be missed out.

The only thing missing so far was a feasible 'front door'. As from now The Open Coalition harnesses the power to research, organize, mobilize, inform and educate the professionals within the cultural and creative industries. The founding partners combine extensive experience in developing and running programmes in which meaningful interventions on a systemic level are developed. And in which society takes the lead and the empowerment process plays an important role. Whether it comes to programmes such as What if Labs, World Design Embassies, IDOLS* and Living Labs.

Bart Ahsmann, CLICKNL: 'It becomes clearer than ever that technology alone is not going to help us out. Next to key enabling technologies we recently introduced key enabling methodologies (KEM's) in the innovation space. So far that has worked very well!'

Han Bekke, Chairman Federatie Creatieve Industrie: 'The new competition is collaboration. In order to remain relevant, we have to work together, and we are also very good at that. To remain competitive, we must be able to offer scale. That is also why TOC is a good idea!'

Martijn Paulen, Director Dutch Design Foundation: 'The scale and complexity of the challenges on the one side and the opportunities and possibilities on the other, call for new processes, new ideas & dreams, with an urgent need for creativity which can only be effectuated through collaboration without borders.'

Dominique van Ratingen, CoeCI program manager: 'With CoECI we are proud to be part of the creative coalition that embraces the human-centred and inclusive approach in the sustainable transition. Creative Innovations will help us to think big and at the same time be pragmatic to activate common goals and integrative solutions.'

Stakeholders

For Amsterdam: see infographic 'CCS Mapping – Greater Amsterdam Region (MRA)'
On the national scale, see below:

Main:
Utrecht University: https://www.uu.nl/
Beeld en Geluid: https://www.beeldengeluid.nl/
Hogeschool van Amsterdam: https://www.hva.nl/
Design United: https://www.4tu.nl/du/en/
Waag: https://waag.org/nl/home
What Design Can Do: https://www.whatdesigncando.com/
IDFA: https://www.idfa.nl/nl/
BNA: https://www.bna.nl/
DGA: https://dutchgamesassociation.nl/
TU Delft: https://www.tudelft.nl/
UvA: https://www.uva.nl/
Radboud Universiteit: https://www.ru.nl/
University of Twente: https://www.utwente.nl/
Netspar: https://www.netspar.nl/
Avans Hogeschool: https://www.avans.nl/
Eindhoven University of Technology: https://www.tue.nl/en/
De Haagse Hogeschool: https://www.dehaagsehogeschool.nl/

Fieldlabs:
Fontys: https://fontys.nl/
Faculty of Industrial design Engineering:
https://www.tudelft.nl/en/ide/
TU Delft Bouwkunde: https://www.tudelft.nl/bk/
Effenaar: https://www.effenaar.nl/
Meertens Instituut: https://www.meertens.knaw.nl/cms/nl/
Open Universiteit: https://www.ou.nl/
SintLucas: https://www.sintlucas.nl/
TNO: https://www.tno.nl/nl/

Investors and Platforms:
Media Perspectives: https://mediaperspectives.nl/
Open House: https://www.open-house.nl/
Innofest: https://innofest.co/
Modint: https://modint.nl/
Netwerk Applied Design Research: http://www.nadr.nl/

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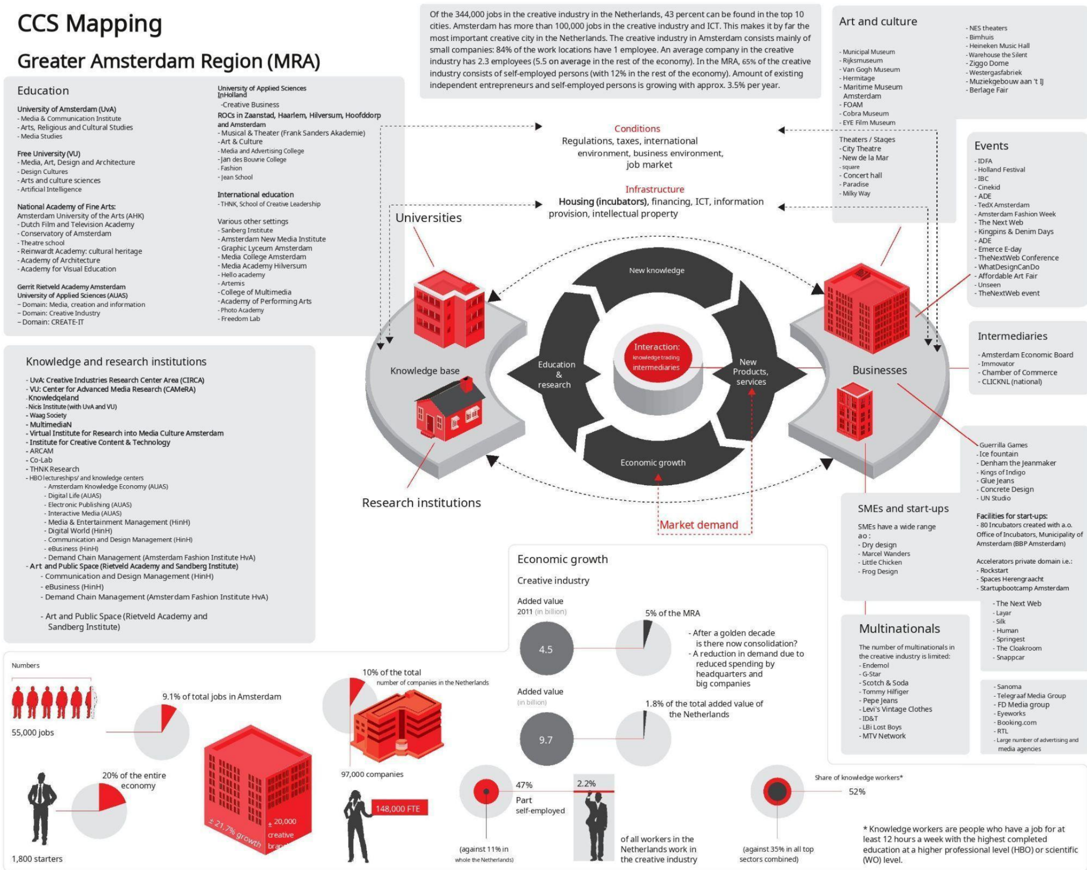
Amsterdam Creative Industries: https://www.ahk.nl/de
ahk/visie/samenwerking/amsterdam-creative-industries-network/
Vereniging Hogescholen: https://www.vereniginghogescholen.nl/
Dutch Design Foundation:
https://www.dutchdesignfoundation.com/
Het Nieuwe Instituut: https://hetnieuweinstituut.nl/
Social Design Showdown: https://www.socialdesign.nu/
ThingsCon: https://www.thingscon.org/
World Design Embassies: https://www.worlddesignembassies.com/
Dutch Creative Council: http://www.creative-council.nl/
Creative Holland: https://www.creativeholland.com/nl

Branches:
Dutch Creative Industries: http://dutchcreativeindustries.com/
BNA: https://www.bna.nl/
BNO: https://www.bno.nl/
Dutch Digital Agencies: https://dutchdigitalagencies.com/
NL NextFashion: https://modint.nl/thema/nl-nextfashion-textiles

Financing:
Creative Industries Fund: https://stimuleringsfonds.nl/
Regieorgan: https://regieorgaan-sia.nl/
NWO: https://www.nwo.nl/
RVO: https://www.rvo.nl
SIDN Fonds: https://www.sidnfonds.nl/
Brabant C: https://www.brabantc.nl/

Government:
Ministry of the Economic Affairs:
https://www.rijksoverheid.nl/ministeries/ministerie-van
economische-zaken-en-klimaat
Ministry of Education:
https://www.rijksoverheid.nl/ministeries/ministerie-van-onderwijs
cultuur-en-wetenschap
Ministry of Infrastructure:
https://www.rijksoverheid.nl/ministeries/ministerie-van
infrastructuur-en-waterstaat



CCS Mapping
Greater Amsterdam Region (MRA)
Education
University of Amsterdam (UvA)
- Media & Communication Institute
- Arts, Religious and Cultural Studies
- Media Studies
Free University (VU)
- Media, Art, Design and Architecture
- Design Cultures
- Arts and culture sciences
- Artificial Intelligence
National Academy of Fine Arts:
Amsterdam University of the Arts (AHK)
- Dutch Film and Television Academy
- Conservatory of Amsterdam
- Theatre school
- Reinwardt Academy: cultural heritage
- Academy of Architecture
- Academy for Visual Education
Gerrit Rietveld Academy Amsterdam
University of Applied Sciences (AUAS)
– Domain: Media, creation and information
– Domain: Creative Industry
– Domain: CREATE-IT
University of Applied Sciences InHolland
-Creative Business
ROCs in Zaanstad, Haarlem, Hilversum, Hoofddorp and Amsterdam
- Musical & Theater (Frank Sanders Akademie)
- Art & Culture
- Media and Advertising College
- Jan des Bouvrie College
- Fashion
- Jean School
International education
- THNK, School of Creative Leadership
Various other settings
- Sanberg Institute
- Amsterdam New Media Institute
- Graphic Lyceum Amsterdam
- Media College Amsterdam
- Media Academy Hilversum
- Hello academy
- Artemis
- College of Multimedia
- Academy of Performing Arts
- Photo Academy
- Freedom Lab
Of the 344,000 jobs in the creative industry in the Netherlands, 43 percent can be found in the top 10 cities. Amsterdam has more than 100,000 jobs in the creative industry and ICT. This makes it by far the most important creative city in the Netherlands. The creative industry in Amsterdam consists mainly of small companies: 84% of the work locations have 1 employee. An average company in the creative industry has 2.3 employees (5.5 on average in the rest of the economy). In the MRA, 65% of the creative industry consists of self-employed persons (with 12% in the rest of the economy). Amount of existing independent entrepreneurs and self-employed persons is growing with approx. 3.5% per year.
Art and culture
- Municipal Museum
- Rijksmuseum
- Van Gogh Museum
- Hermitage
- Maritime Museum Amsterdam
- FOAM
- Cobra Museum
- EYE Film Museum
- NES theaters
- Bimhuis
- Heineken Music Hall
- Warehouse the Silent
- Ziggo Dome
- Westergasfabriek
- Muziekgebouw aan 't IJ
- Berlage Fair
Theaters / Stages
- City Theatre
- New de la Mar
- square
- Concert hall
- Paradise
- Milky Way
Events
- IDFA
- Holland Festival
- IBC
- Cinekid
- ADE
- TedX Amsterdam
- Amsterdam Fashion Week
- The Next Web
- Kingpins & Denim Days
- ADE
- Emerce E-day
- TheNextWeb Conference
- WhatDesignCanDo
- Affordable Art Fair
- Unseen
- TheNextWeb event
Conditions
Regulations, taxes, international environment, business environment, job market
Infrastructure
Housing (incubators), financing, ICT, information provision, intellectual property
Universities
Knowledge base
Research institutions
New knowledge
Education & research
Interaction: knowledge trading intermediaries
New Products, services
Economic growth
Market demand
Businesses
Intermediaries
- Amsterdam Economic Board
- Immovator
- Chamber of Commerce
- CLICKNL (national)
Knowledge and research institutions
- UvA: Creative Industries Research Center Area (CIRCA)
- VU: Center for Advanced Media Research (CAMeRA)
- Knowledgeland
- Nicis Institute (with UvA and VU)
- Waag Society
- MultimediaN
- Virtual Institute for Research into Media Culture Amsterdam
- Institute for Creative Content & Technology
- ARCAM
- Co-Lab
- THNK Research
- HBO lectureships/ and knowledge centers
- Amsterdam Knowledge Economy (AUAS)
- Digital Life (AUAS)
- Electronic Publishing (AUAS)
- Interactive Media (AUAS)
- Media & Entertainment Management (HinH)
- Digital World (HinH)
- Communication and Design Management (HinH)
- eBusiness (HinH)
- Demand Chain Management (Amsterdam Fashion Institute HvA)
- Art and Public Space (Rietveld Academy and Sandberg Institute)
- Communication and Design Management (HinH)
- eBusiness (HinH)
- Demand Chain Management (Amsterdam Fashion Institute HvA)
- Art and Public Space (Rietveld Academy and Sandberg Institute)
- Guerrilla Games
- Ice fountain
- Denham the Jeanmaker
- Kings of Indigo
- Glue Jeans
- Concrete Design
- UN Studio
Facilities for start-ups:
- 80 Incubators created with a.o. Office of Incubators, Municipality of Amsterdam (BBP Amsterdam)
Accelerators private domain i.e.:
- Rockstart
- Spaces Herengraacht
- Startupbootcamp Amsterdam
SMEs and start-ups
SMEs have a wide range ao :
- Dry design
- Marcel Wanders
- Little Chicken
- Frog Design
- The Next Web
- Layar
- Silk
- Human
- Springest
- The Cloakroom
- Snappcar
Multinationals
The number of multinationals in the creative industry is limited:
- Endemol
- G-Star
- Scotch & Soda
- Tommy Hilfiger
- Pepe Jeans
- Levi's Vintage Clothes
- ID&T
- LBi Lost Boys
- MTV Network
- Sanoma
- Telegraaf Media Group
- FD Media group
- Eyeworks
- Booking.com
- RTL
- Large number of advertising and media agencies
Economic growth
Creative industry
Added value
2011 (in billion)
4.5
5% of the MRA
- After a golden decade is there now consolidation?
- A reduction in demand due to reduced spending by headquarters and big companies
Added value
(in billion)
9.7
1.8% of the total added value of the Netherlands
Numbers
55,000 jobs
9.1% of total jobs in Amsterdam
1,800 starters
20% of the entire economy
± 21.7% growth
± 20,000 creative
10% of the total number of companies in the Netherlands
97,000 companies
148,000 FTE
47%
Part self-employed
(against 11% in whole the Netherlands)
2.2%
of all workers in the Netherlands work in the creative industry
Share of knowledge workers*
52%
(against 35% in all top sectors combined)
* Knowledge workers are people who have a job for at least 12 hours a week with the highest completed education at a higher professional level (HBO) or scientific (WO) level.

QUESTIONNAIRE

The second phase of the research includes the development and distribution of a questionnaire. This will help us acquire important information regarding the needs and requirements of professionals pertaining to the CCS. The questionnaire was designed cooperatively by all partners, and once finalized, it was translated and then distributed to our target groups in the partner countries.

Once the collection of answers was completed, each partner had to write a report concerning the questionnaire results in their respective country (Annex II). That gave us a clear view of the situation in each country and facilitated the development of the final report concerning the needs and requirements of professionals in all five partner countries.

Questionnaire Development and Implementation

In order to achieve both the general and specific objectives of the project and retrieve all the necessary information, a questionnaire in English was developed, uploaded on a freely accessible web platform (Google form) and then distributed to a list of stakeholders in the Culture and Creativity Sectors.

At first, all partners started developing the structure of the questionnaire and its various subsectors. Once the several sections within the questionnaire were defined, each partner selected one and proposed a list of questions for that specific section. That way, we ensured that all partners would be actively involved in the development of the questionnaire, each one providing their knowledge and expertise. In the next stage, the proposed questions were revised by the consortium until the questionnaire reached its final form. That first questionnaire was in English, and the next step was to translate it in the partners' languages. Each partner was responsible for the translation of the English questionnaire in their native language. More specifically, the questionnaire was translated in the following languages (please see Annex I):

1. Greek
2. Dutch
3. Italian
4. Spanish

Once this phase was completed, the questionnaires were sent via email to professionals, entrepreneurs, cultural foundations, governmental organizations, and other associations related to the fields of culture and creativity. To facilitate the whole process, phone and email communication was established with several stakeholders and people in key positions in the above mentioned organizations.

Each partner distributed the questionnaire in their respective country. Engaging the largest possible number of respondents to complete the questionnaires was crucial as it would allow the extraction of valid information and collection of valuable data about the training needs and requirements of professionals pertaining to the Culture and Creativity Sectors (CCS).

At the final stage, once all responses were collected, a Master questionnaire in English was developed, where partners transferred each answer from each of their questionnaires. The purpose was to have all data from all countries gathered in one questionnaire. That way, not only we would have a spherical and clear view of the information provided, but also we would be able to process the data more effectively, generate valid conclusions, and make appropriate recommendations.

Questionnaire Design

After a series of changes and revisions, the final draft of the questionnaire included eleven (11) different sections. In the beginning of the questionnaire there was a welcome note that provided information about the context of the project, as well as its aims and objectives. Sections 2-9 consist the main body of the questionnaire, as they include the questions (according to the type of data that needed to be collected, close-ended, open-ended questions, as well as Likert scale questions were included). Finally, sections 10 and 11 include the General Data Protection Regulation (GDPR) consent form, and a thankful note/contact details (ENVISION's website and social media accounts).

More specifically, the questionnaire was divided into the following eleven (11) sections:

1. Welcome note: Information about the context and the objectives of the ENVISION project, as well as practical aspects of the questionnaire (estimated response time).
2. Socio-demographic data: Gender and age of the respondent, level of education, business field/profession, current employment status and country.
3. COVID-19 pandemic impact: In this part of the questionnaire, respondents had to state how the pandemic affected their work/livelihood, what type of support they need right now, and in what ways they were sharing their work during the pandemic.
4. Entrepreneurship in the creative industries: In this part of the survey, our intention is to identify the impact and opportunities that occurred for creative entrepreneurs during the COVID-19 pandemic.

5. Fundraising and sponsoring of creative projects: This part of the survey aims to gain an insight on the funding activities and methods Culture and Creativity professionals employ in Cyprus.
6. The networking toolbox for cultural entrepreneurs: Here, our intention was to identify our target group's networking challenges in the time of the COVID-19 pandemic.
7. The use of ICTs in the creative industries; Innovative tools and techniques: Our purpose here was to examine the impact of ICTs (Information and Communications Technologies) on the CCS and on our respondents' working environments.
8. Art industry & social media: In this section of the questionnaire, the purpose was to collect information on the use of social media in terms of promotion, communication, networking, and even as a sales channel, prior and during the COVID-19 pandemic.
9. Toolbox for marketing your creative business on the market: This part of the survey aims to examine our target group's activity in regard to marketing creative tools and visual identity.
10. GDPR compliance: Respondents had to read and sign the GDPR Consent Form before submitting the questionnaire.
11. Thank you note: This section included the project's website and social media accounts. Also, respondents were asked to sign in to our Newsletter and learn first all the news and activities of the ENVISION project.

Target Group/Sampling Method

The target group of the questionnaire were professionals pertaining to the Culture and Creativity Sectors (CCS), and more specifically to the following sub sectors:

1. Performing arts (theatre, dance, music, festivals)
2. Visual arts (painting, sculpture, photography, crafts)
3. Books and Press (book publishing, newspaper/magazine, library)
4. Audio-visual and interactive media (film and video, TV and radio, web streaming, video games)
5. Design and Creative services (fashion / graphic/ interior / product design)
6. Culture and Heritage (Museums, Archaeological places, Cultural or Natural landscapes)
7. Advertising

Moreover, regarding their role in their business:

1. Freelancer
2. Business owner
3. Business Leader / part of a leadership team
4. Manager
5. Employee
6. Intern

The representation of a wide spectrum of sub sectors within the CCS, as well as of different positions/roles in the industry, will facilitate and support the extraction of valuable information and consequently the development of a tailor made curriculum and platform for all CCS professionals.

The target group of the questionnaire was mainly approached using non-probability sampling techniques. Having already defined the various sub sectors of the CCS, as well as the roles within those sub sectors, each partner organization addressed potential respondents of the questionnaire, trying to follow the general quota of our target group so that all subsectors be equally represented (quota sampling). In a second phase, snowball sampling was also used (questionnaire respondents/participants suggested other individuals to be sampled).

Questionnaire Results

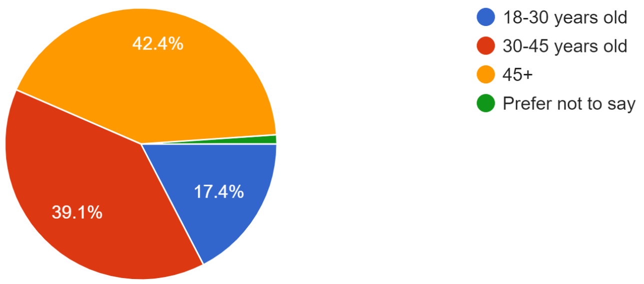
Socio-demographic data

In the first part of the questionnaire we examine the demographic characteristics of our sample.

As far as their gender is concerned, from the total of people who filled in the questionnaire, 54,3% were female, and 40,2% were male.

Age Group

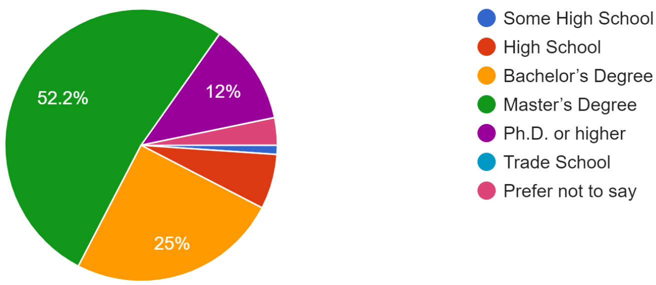
What is your age?
92 responses



Regarding their age groups, 39,1% of the respondents stated that they belong to the group of 30-45 years old, 42,4% to the group of 45+, and 17,4% are between 18-30 years old. The fact that all age groups are adequately represented in the sample will help us extract valuable data and information. Specifically, younger people will provide information as a dynamic population having future expectations from the CCS, while the respondents of the older ages will contribute to the results and complement them based on their experience in the specific fields.

Educational Level

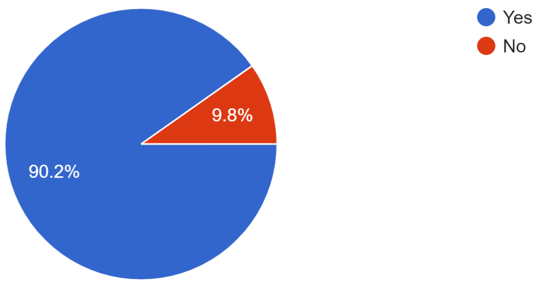
What is the highest degree or level of education you have completed?
92 responses



Moreover, regarding their educational level, the majority of the participants (52,2%) replied they have a Master's degree, 25% hold a Bachelor's degree, 12% of the respondents have a Ph.D., and finally 6,5% stated that they are high school graduates.

Do you currently work, or have you worked in the Culture and Creative sectors within the last 12 months?

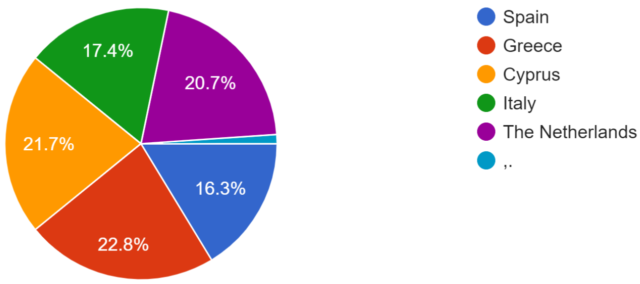
Do you currently work, or have you worked in the Culture and Creative sectors within the last 12 months?
92 responses



The vast majority of the respondents (90,2%) stated that they are currently active or have worked in the CCD within the last year. Only a small percentage of 9,8% gave a negative answer to that question.

Where is your home located?

Where is your home located?
92 responses



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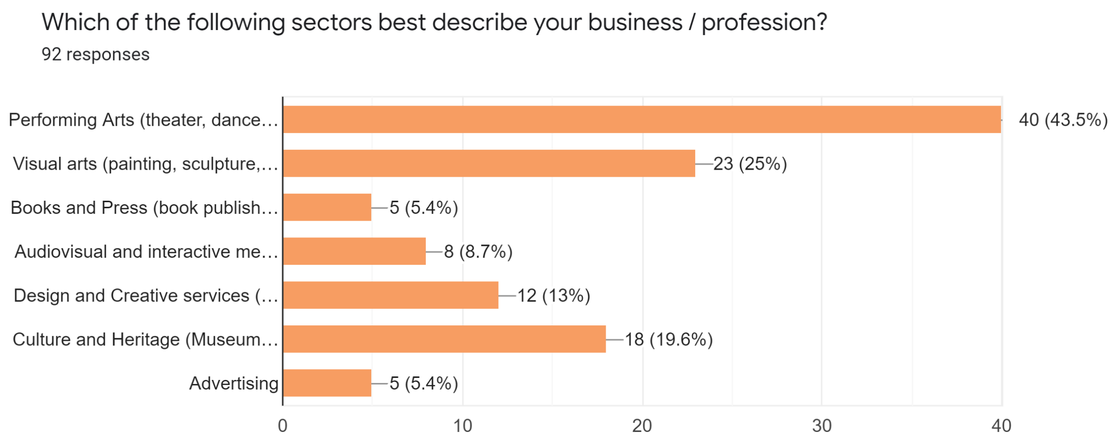
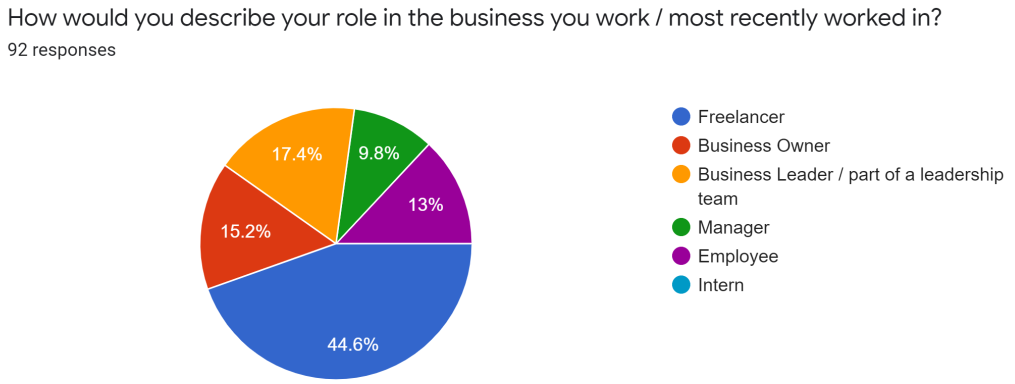
Since this questionnaire aims to identify the needs and requirements of the CCS in five specific countries, it was crucial to gather participants from these countries. The responses reveal that all these countries are almost equally represented, a fact that facilitates the development of valid results. More specifically, 22,8% of the respondents stated that they are currently living in Greece, 21,7% in Cyprus, 20,7% in Netherlands, 17,4% in Italy, and finally 16,3% in Spain.

Business sector



Here, it was very interesting to discover that almost all art sectors are represented in the responses. Specifically, 43,5% of the respondents stated that they are currently working on performing arts (theatre, dance, music, festivals), while 25% of the participants stated visual arts (painting, sculpture, photography, crafts) as their business field. Moreover, 19,6% identified culture and heritage (museums, archaeological places, cultural or natural landscapes) as their field, while 13% stated that their profession concerns design and creative services (fashion/ graphic/ interior/ product design). There were also 8,7% of the respondents who mentioned audiovisual and interactive media (film and video, TV and radio, web streaming, video games) as their business sector, while 5,4% stated books and press (book publishing, newspaper/magazine, library). Finally, advertising was selected by 5,4% of the participants.

Business role



Regarding their business role, almost half of the respondents (44,6%) stated that they are freelancers, 17,4% are business leaders/part of a leadership team, 15,2% are business owners, 13% are employees, and finally another 9,8% of the participants replied that they are managers.

In conclusion, the fact that our participants represent not only almost all business sectors, but also various positions within those sectors, allows us to extract valuable information regarding their needs and requirements. Moreover, the vast majority of them are currently active or have worked in the CCS within the last year, which means that they are able to access the current situation, identify the needs in the culture and creativity sectors, and help us efficiently address them through our curriculum.

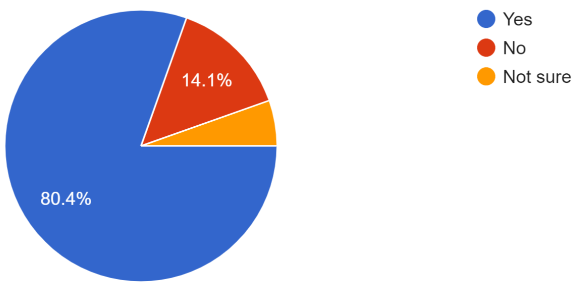
COVID-19 pandemic impact

In this part of the questionnaire, we are trying to identify the impact of the COVID-19 pandemic on our target group, as well as the kind of support they consider more useful at the moment. This section mainly includes multiple choice questions, giving the respondents the opportunity to select more than one answer.

Has the COVID-19 pandemic threatened your work?

Has the COVID-19 pandemic threatened your work?

92 responses

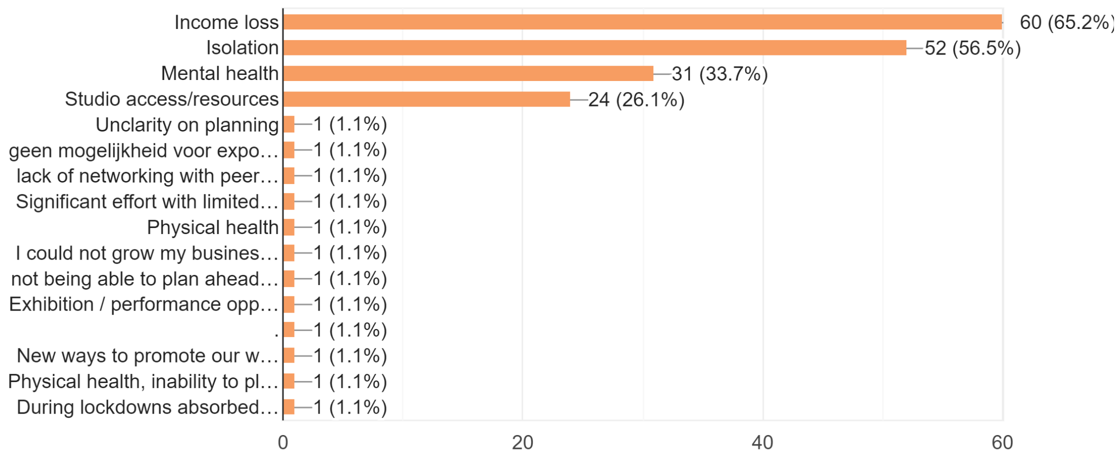


As anticipated, the vast majority of the respondents (80,4%) stated that the COVID-19 pandemic has threatened their work, while only a small percentage (14,%) answered negatively.

How has COVID-19 pandemic had an impact on your livelihood as a CCS professional?

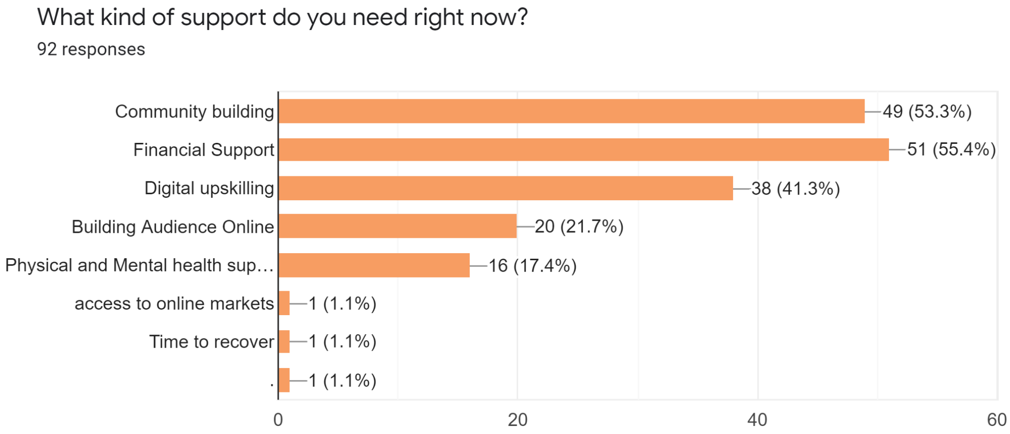
How has COVID-19 pandemic had an impact on your livelihood as a CCS professional?

92 responses



The vast majority of the participants (65,2%) identified income loss as being the most severe effect of the pandemic, while 56,5% of the respondents stated that isolation was also a great impact. Moreover, 33,7% identified the implications on mental health, and another 26,1% highlighted the impact on studio access/resources.

What kind of support do you need right now?

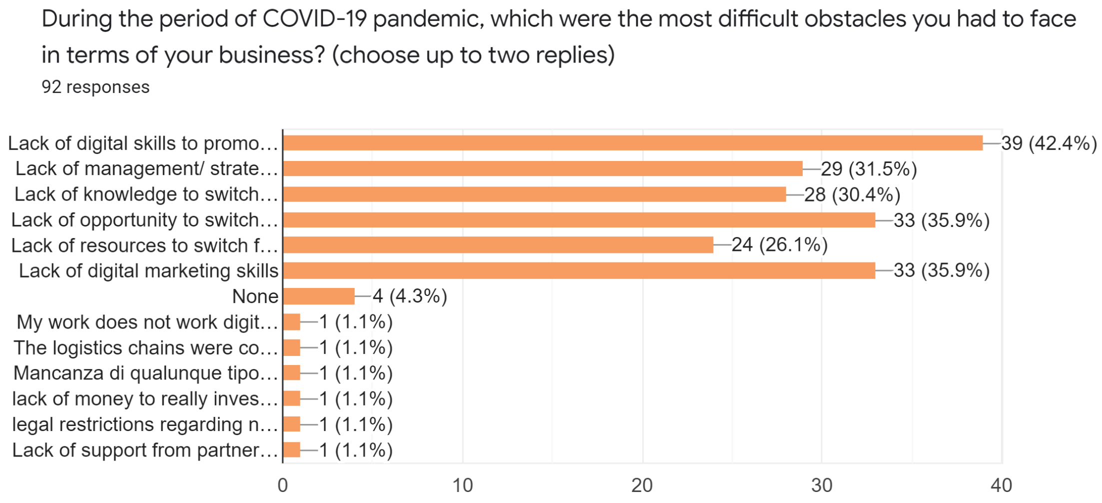


Taking into consideration the answers given in the previous question, it comes as no surprise the fact that when asked about the ideal supportive measures, most respondents selected financial support. More specifically, as we see in the above chart, more than half of the respondents (55,4%) stated that financial support is the most important thing they need right now, while 53,3% replied community building. Moreover, digital upskilling was selected by 41,3% of the participants, and 21,7% chose the answer 'building audience online'. Finally, 17,4% of the respondents identified the need for physical and mental health support.

Entrepreneurship in the creative industries

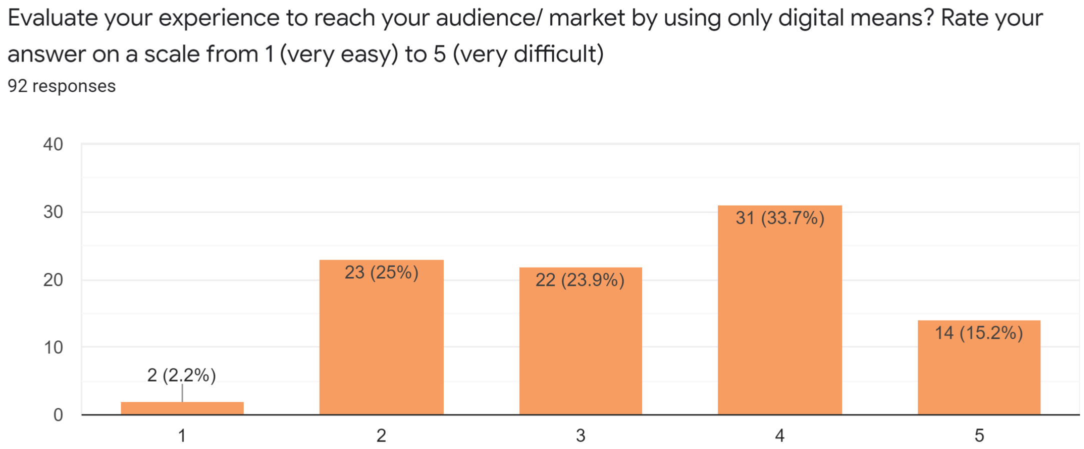
This part of the questionnaire includes both multiple choice (respondents were asked to select up to two replies) and Likert scale questions. Our purpose here was to identify the challenges faced by our target group during the COVID-19 pandemic in terms of their business, and also shed light on their training needs and priorities regarding entrepreneurship. More specifically:

During the period of COVID-19 pandemic, which were the most difficult obstacles you had to face in terms of your business?



The lack of digital skills to promote their business was identified by 42,4% of the respondents as being the biggest difficulty during the COVID-19 pandemic, while 35,9% stated the lack of opportunity to switch from face to face to online sales/ promotion of work. Moreover, another 35,9% mentioned the lack of digital marketing skills, while 31,5% of the participants identified the lack of management/strategic skills. Additionally, the lack of knowledge to switch from face to face to online sales/ promotion of work was selected by 30,4%, and the lack of resources to switch from face to face to online sales was chosen by 26,1% of the respondents.

Evaluate your experience to reach your audience/ market by using only digital means? Rate your answer on a scale from 1 (very easy) to 5 (very difficult)



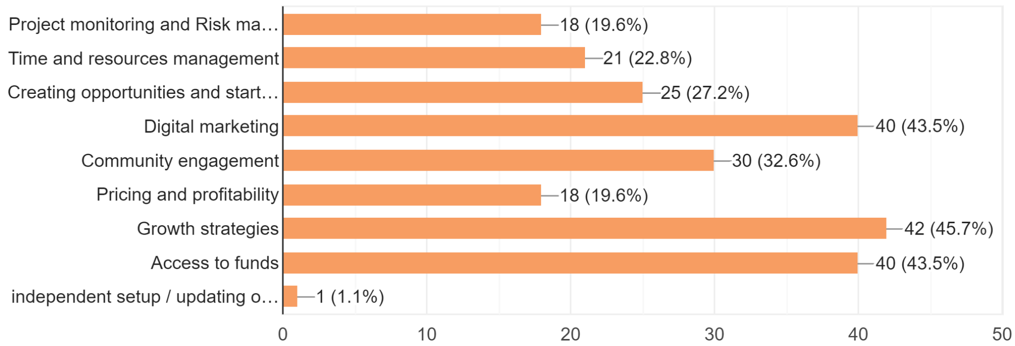
Almost half of the respondents (48,9%) evaluated their experience to reach their audience/market by using only digital means as being very difficult or difficult. More specifically, 15,2% selected option 5 (very difficult), while 33,7% chose option 4 (difficult). On the other end of the spectrum, a rather smaller percentage (27,2%) evaluated their experience as being very easy or easy (2,2% selected option 1/very easy, and 25% chose option 2/easy). Finally, 23,9% of the participants selected option 3.

The answers given to the above question reflect a lack of knowledge on the use of digital means to reach the audience/market, and consequently the need for training in that area.

Having identified their difficulties and obstacles during the COVID-19 pandemic, the participants were then asked to state their training preferences regarding the enhancement of their entrepreneurial skills.

If you were to participate in a course aimed at enhancing your entrepreneurial skills, which of the following modules would be your priority?

If you were to participate in a course aimed at enhancing your entrepreneurial skills, which of the following modules would be your priority? (Select up to two replies)
92 responses



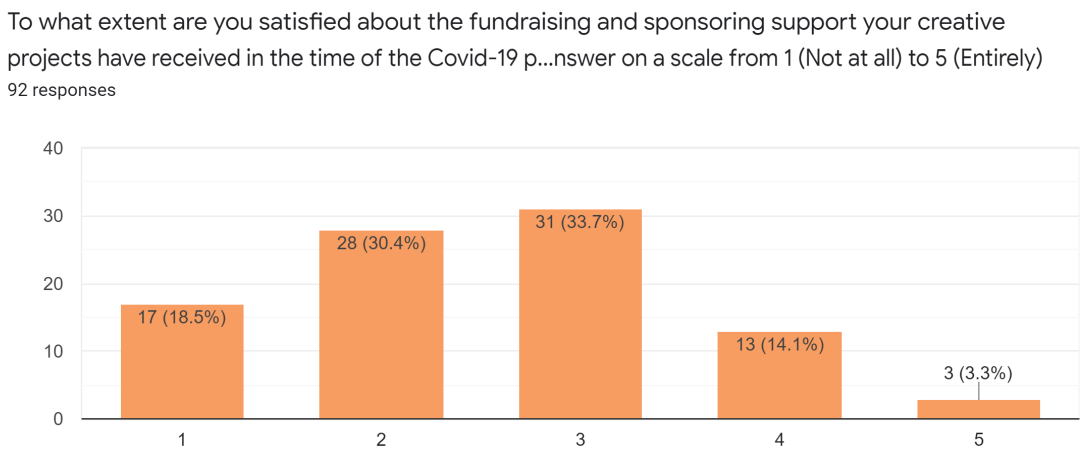
Growth strategies were selected by 45,7% of the respondents, while digital marketing and access to funds were also identified as being very important areas, and chosen by 43,5% of the participants respectively. Moreover, 32,6% identified community engagement as their preferred training area, and 27,2% stated that a module concerning creating opportunities and start-up launch would be their priority. Finally, time and resources management was selected by 22,8% of the respondents, while 'project monitoring and risk management' and 'pricing and profitability' gathered 19,6% respectively.

Fundraising and sponsoring of creative projects

In this section of the questionnaire, participants were asked to provide information on how fundraising and sponsoring have affected their business during the COVID-19 pandemic. To retrieve the necessary information, a combination of open-ended, close-ended, and Likert scale questions was used.

The analysis of the results reveals that fundraising and sponsoring limitations, caused by the COVID-19 pandemic and its subsequent restrictions, have severely affected the industry and led to postponements and even cancellations of many creative projects. More specifically:

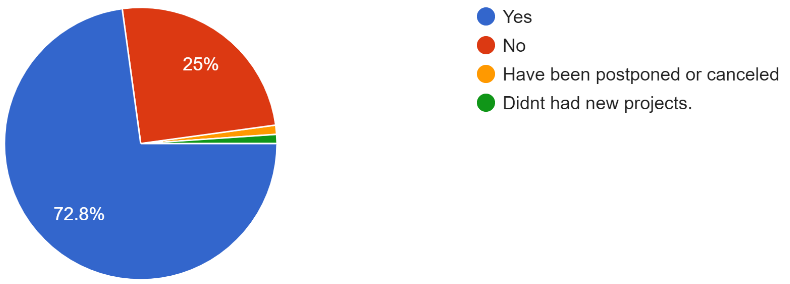
To what extent are you satisfied about the fundraising and sponsoring support your creative projects have received in the time of the Covid-19 pandemic? Rate your answer on a scale from 1 (Not at all) to 5 (Entirely).



Almost half of the respondents (48,9%) stated that they are not satisfied with the fundraising and sponsoring support they have received during the COVID-19 pandemic. More specifically, 30,4% selected option 2, while another 18,5% selected option 1. Moreover, 33,7% of the participants replied that they are somehow satisfied and chose option 3. Only 17,4% of the respondents stated that they are satisfied (3,3% selected option 5, and 14,1% chose option 4).

Have any of your creative projects been postponed or cancelled due to fundraising and sponsoring limitations, during Covid-19 pandemic?

Have any of your creative projects been postponed or cancelled due to fundraising and sponsoring limitations, during Covid-19 pandemic?
92 responses



The vast majority of the respondents (72,8%) stated that they had creative projects postponed or cancelled due to fundraising and sponsoring limitations, during the COVID-19 pandemic. Only 25% of the participants gave a negative reply to that question.

The networking toolbox for cultural entrepreneurs

This part of the questionnaire focuses specifically on our target group's networking challenges during, and after, the COVID-19 pandemic. Once again, a combination of close-ended and multiple choice questions have been used to retrieve the necessary information.

The findings reveal that, as far as their networking efforts are concerned, the majority of respondents have been severely affected by the COVID-19 pandemic. The transition to alternative ways of networking has left many professionals struggling with new challenges, which we are specified in this section. More specifically:

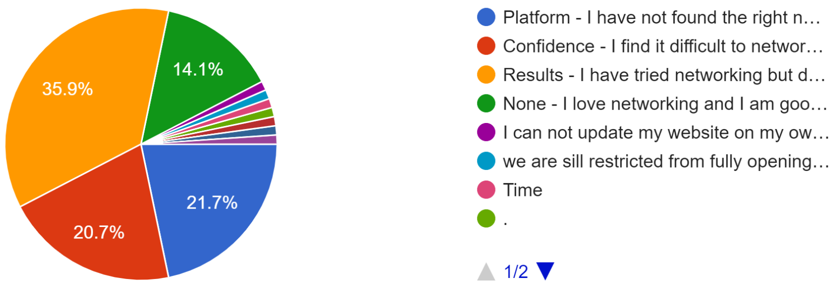
If you compare the way you were networking before Covid-19 pandemic and after, what is the biggest shift in your style of networking?

If you compare the way you were networking before Covid-19 pandemic and after, what is the biggest shift in your style of networking?
92 responses

Almost half of the respondents (45,7%) stated that stepping over from real life networking to online networking was the biggest shift in their style of networking. Moreover, using existing digital tools in a new way (i.e. using social media for professional goals), has been identified by 31,5% of the respondents as being a very important change in their networking efforts. Finally, the answer 'broadening my online communication from 'one on one' to simultaneous, large group communication (i.e. large Zoom conferences)' gathered 19,6% of the responses.

What is your current networking challenge?

What is your current networking challenge?
92 responses



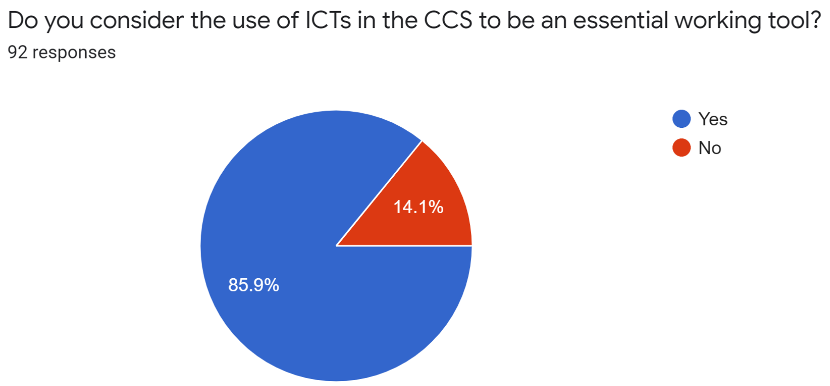
Regarding their current networking challenge, 35,9% of the respondents stated that even though they have tried networking, they don't see positive results. Moreover, 21,7% replied that they have not found the right network for their needs, while 20,7%

of the participants mentioned the lack of confidence towards networking. Finally, 14,1% of the respondents stated that they don't face a specific challenge, as they are good at networking.

The use of ICTs in the creative industries: Innovative tools/techniques

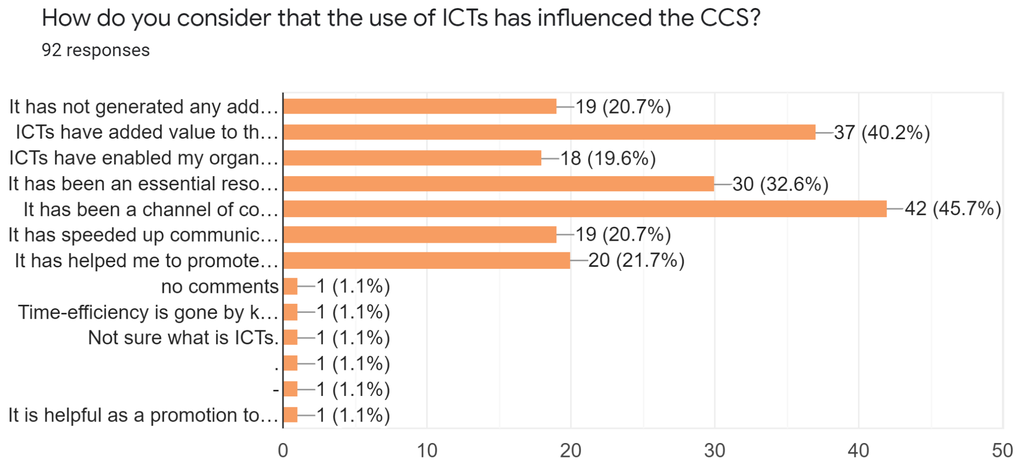
The massive digitalization during the COVID-19 pandemic in the culture and creativity sectors has given rise to new business models and alternative ways of interaction and communication. In this section, our purpose is to identify our target group's perspectives on the use of ICTs in the sector. More specifically:

Do you consider the use of ICTs in the CCS to be an essential working tool?



The vast majority of the respondents (85,9%) acknowledges the importance of ICTs in the CCS, while only 14,1% of the participants replied that they don't find them essential.

How do you consider that the use of ICTs has influenced the CCS?



Almost half of the respondents (45,7%) replied that ICTs have been a channel of communication with their clients and stakeholders, while 40,2% of them mentioned that ICTs have added value to the operational and management activities of their entity. Moreover, 32,6% stated that ICTs have been an essential resource for the dissemination and marketing of their organisation's activities. Finally, 20,7% of the respondents answered that the use of ICTs has not generated any added value in their organisation, while another 20,7% mentioned that it has speeded up communication between employees within the company, encouraging teamwork.

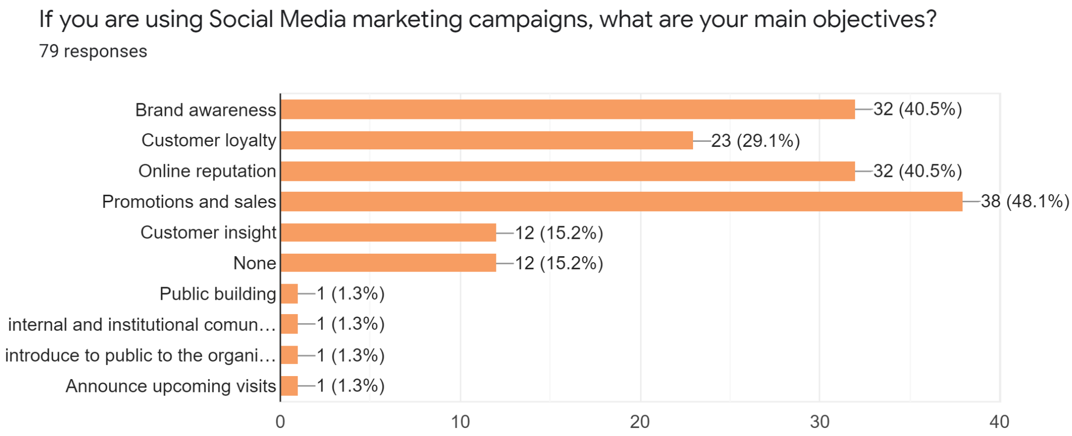
Art industry & social media

Social media is an integral part of today's society and consequently, of the Culture and Creativity sectors in terms of promotion, communication, networking - and even as a sales channel. In this section of the questionnaire, our purpose is to gather information regarding the use of social media by CCS professionals, prior to and during the COVID-19 pandemic.

Results reveal that Facebook, Instagram, LinkedIn, and Youtube are the most popular platforms among the participants. Almost half of the respondents stated that they have been publishing content in their business social media accounts depending on situations, without regularity, while the majority of the participants replied that they are familiar with social media marketing campaigns and have been using them prior to and during the COVID-19 pandemic.

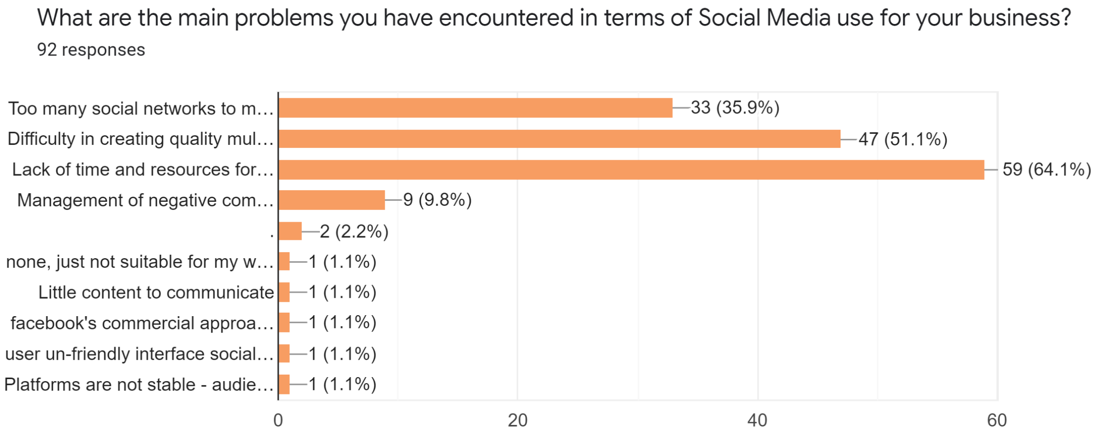
More specifically, regarding their objectives as well as the problems they have encountered in terms of social media use in their business, participants gave the following answers:

If you are using Social Media marketing campaigns, what are your main objectives?



Almost half of the respondents (48,1%) stated that they are using social media marketing campaigns mainly for promotions and sales, while 40,5% replied 'brand awareness' and another 40,5% of the participants selected 'online reputation'.

What are the main problems you have encountered in terms of Social Media use for your business?



The vast majority of the participants (64,1%) identified the lack of time and resources for the strategic use of social media as a big problem, while 51,1% replied that their main problem has been the difficulty in creating quality multimedia content due to the lack of specialized personnel within the staff. Finally, 35,9% of the respondents stated that their main problem has been the fact that there are too many social networks to manage.

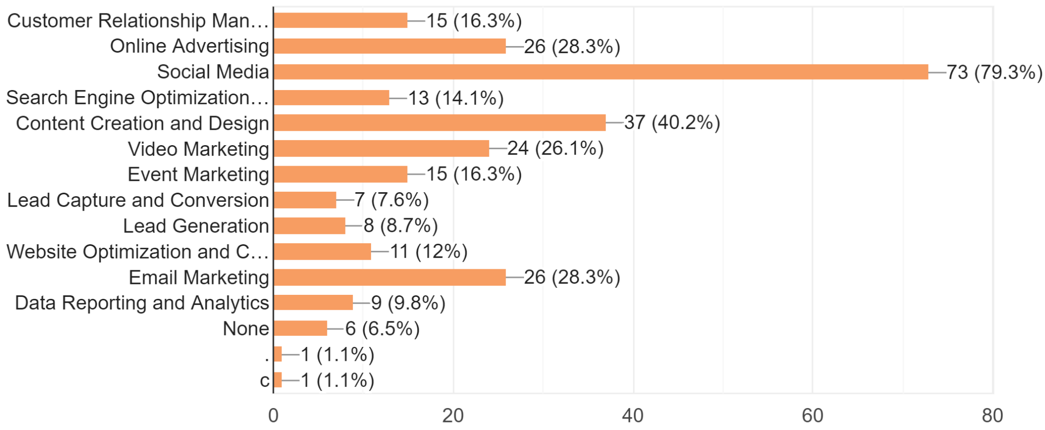
Toolbox for marketing your creative business on the market

The implementation of marketing tools has become an essential part of business development and promotion in the digital era. In this part of the questionnaire, our aim is to shed light on the familiarity of our target group with the current marketing tools, as well as on their needs in terms of business marketing.

Results reveal a need for training in modern marketing tools, as the majority of the respondents stated that they don't have an established marketing strategy for their organisation's/individual business. Moreover, when it comes to business marketing, they mainly rely on the use of social media, not taking full advantage of the available marketing tools. More specifically:

Which of the following marketing tools you or your organization have been using during COVID-19 pandemic?

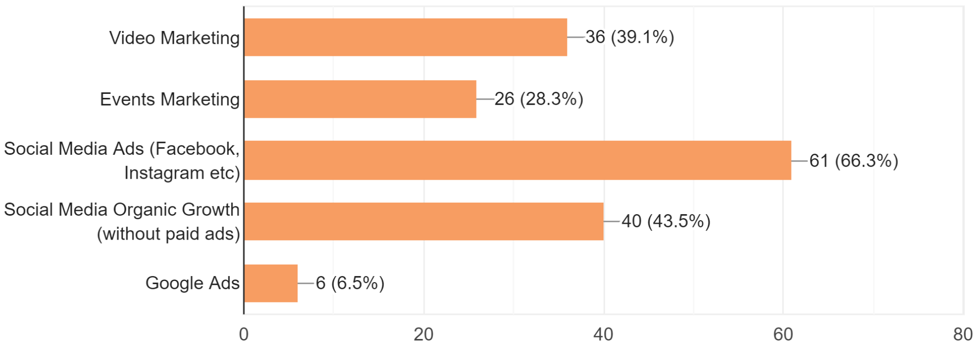
Which of the following marketing tools you or your organization have been using during COVID-19 pandemic?
92 responses



The vast majority of the respondents (79,3%) replied ‘social media’, while 40,2% selected ‘content creation and design’. Moreover, the answers ‘online advertising’ and ‘email marketing’ gathered a percentage of 28,3% each. Finally, 26,1% of the participants stated that they have been using video marketing as a marketing tool during the COVID-19 pandemic.

Select below the types of marketing actions you or your organisation implemented, at least once, during Covid-19 Pandemic:

Select below the types of marketing actions you or your organisation implemented, at least once, during Covid-19 Pandemic:
92 responses



Regarding the implementation of marketing actions, the answers ‘social media ads’ and ‘social media organic growth’ have been mostly selected, with a percentage of 66,3% and 43,5% respectively. Finally, 39,1% of the respondents replied ‘video marketing’.

Recommendations

This questionnaire has been completed by professionals pertaining to the culture and creativity sectors in Italy, Spain, Cyprus, Greece, and the Netherlands. The analysis of the results has led to the identification of specific areas/needs that have to be addressed by specialized digital tools and relevant training courses in the ENVISION accelerator platform. Based on the answers given by the majority of the respondents, the following training topics/areas emerge:

TRAINING TOPIC
ENTREPRENEURSHIP
Growth strategies
Digital marketing
Access to funds
FUNDRAISING/SPONSORING
NETWORKING
Methods and tools
ICTs
Innovative tools and techniques
SOCIAL MEDIA
Strategic use
Content creation
Management
MARKETING
Marketing strategy
Marketing tools

EXPERIENCE ENGINEERING WORKSHOP

The purpose of the workshop was to define the specifications of the Envision platform, which will be developed in the context of IO2: Development of the online accelerating platform for CCS stakeholders.

For the definition of the specifications, the consortium relied on the description provided in the proposal, the analysis of the questionnaires that were distributed in the context of the IO1 implementation and, finally, the organization of an experience engineering workshop with representatives of the CCS.

Personas' creation

For carrying out the workshop, Found.ation, leader of IO2, started by creating three personas, to facilitate the understanding of the participants of the scope and objective of the platform.

Personas are fictional characters, which are created in an attempt to answer specific research questions, and aim at representing the different user types that might use a specific service, product, site, or brand, which is currently under development. Creating personas helps in understanding the users' needs, experiences, behaviours and goals. Creating personas can help the designer(s) recognise that different people have different needs and expectations, which may be identified through the use of the created personas. Personas make the design task less complex, they guide the ideation processes, and they can help achieve the creation of a good user experience for the target user group.

As opposed to designing products, services, and solutions based upon the preferences of the design team, it has become standard practice within many human centred design disciplines to collate research and personify certain trends and patterns in the data as personas. Hence, personas do not describe real people, they are composed based on real data collected from multiple individuals. Personas add the human touch to what would largely remain cold facts in a research. During the creation of personas profiles of typical or atypical (extreme) users, the understanding of patterns will help during the research, which synthesises the types of people the design is in principle being made for. Personas are also known as model characters or composite characters.

In the Design Thinking process, designers will often start by creating personas during the second phase, the Define phase. In the Define phase, Design Thinkers synthesise their research and findings from the very first phase, the Empathise phase. Using personas is just one method, among others, that can help designers move on to the third phase, the Ideation phase.

Based on the above, three personas were created.

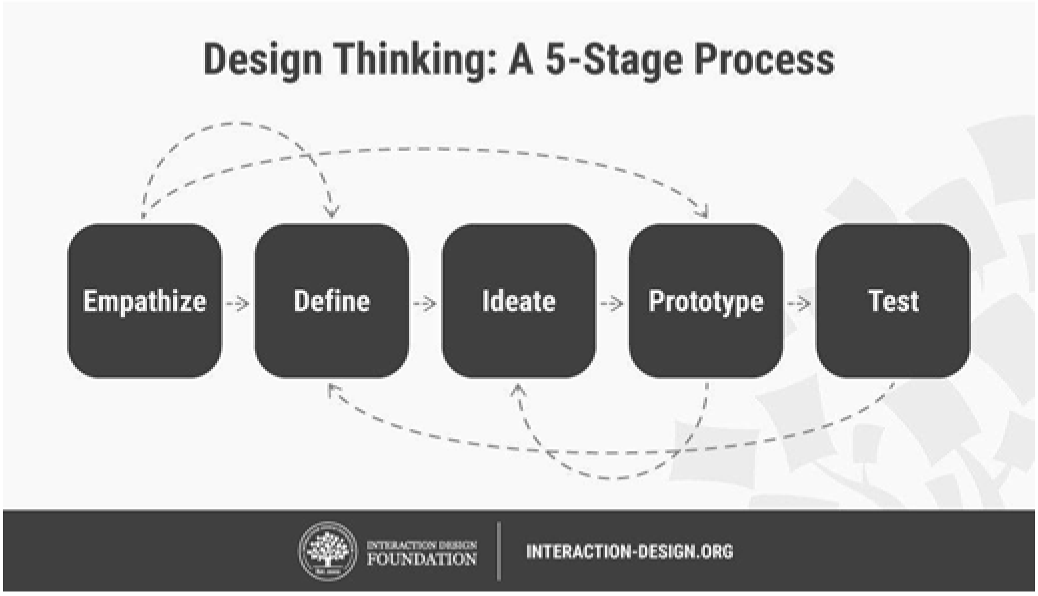
Structure of the engineering workshop

Following the creation of the profiles, Found.ation organised an interactive workshop consisting of a selected focus group composed by experts related to the CCS and an expert innovation facilitator. The workshop was held online on the 23rd of September 2021.

The workshop consisted of two parts: the first one included a fitness assessment session, during which the participants were introduced to the scope and objectives of the project. Moreover, they were presented with the ecosystem mapping in Greece and Cyprus and the preliminary findings of the survey carried out within the Envision partnership to map the needs of the CCS professionals.

The second part of the workshop was an experience mapping session, during which the personas developed were emulated across the different modules that will be hosted in the Envision platform. The objective was to enrich the different modules provisioned with user-centred input. It was conducted based on design thinking methodologies and the tool that was used was Miro.

Design Thinking is a design methodology that provides a solution-based approach to solving problems. It's extremely useful in tackling complex problems that are ill-defined or unknown, by understanding the human needs involved, by re-framing the problem in human-centric ways, by creating many ideas in brainstorming sessions, and by adopting a hands-on approach in prototyping and testing. Understanding these five stages of Design empowers the application of the Design Thinking methods in order to solve complex problems that occur around us. It consists of five stages, as illustrated below.



Stage 1: Empathize—Research the users' needs

The first stage of the Design Thinking process is to gain an empathic understanding of the problem that needs to be resolved. This involves consulting experts to find out more about the area of concern through observing, engaging and empathising with people to understand their experiences and motivations, as well as immersing yourself in the physical environment so you can gain a deeper personal understanding of the issues involved. Empathy is crucial to a human-centred design process such as Design Thinking, and empathy allows design thinkers to set aside their own assumptions about the world in order to gain insight into users and their needs. Depending on time constraints, a substantial amount of information is gathered at this stage to use during the next stage and to develop the best possible understanding of the users, their needs, and the problems that underlie the development of that particular product.

Stage 2: Define—State the users' needs and problems

During the second stage, the objective is the accumulation of the information gathered during the Empathise stage and the analysis of the observations, along with their synthesis to define the core problems identified. These definitions are called problem statements. The designer can then create personas to help keep their efforts human-centred before proceeding to ideation.

Stage 3: Ideate—Challenge assumptions and create ideas

This is the ideas generation phase. The solid background of knowledge from the first two phases means the designer can start to "think outside of the box", look for alternative ways to view the problem and identify innovative solutions to the problem statement initially created. Brainstorming is particularly useful here.

Stage 4: Prototype—start to create solutions

This is an experimental phase. The aim is to identify the best possible solution for each problem found. The designer team should produce some inexpensive, scaled-down versions of the product/ service or specific features of the product/ service to investigate the ideas generated. This could involve simply paper prototyping.

Stage 5: Test—Try Your Solutions Out

Evaluators rigorously test the prototypes. Although this is the final phase, design thinking is iterative: Teams often use the results to redefine one or more further problems. So, the team can return to previous stages to make further iterations, alterations and refinements – to find or rule out alternative solutions.

Overall, the designer should understand that these stages are different modes which contribute to the entire design project, rather than sequential steps. The goal throughout the process is to gain the deepest understanding of the users and what their ideal solution/product would be.

Users' specifications for the Envision Platform

The results of the workshop for each module of the ENVISION accelerator platform are as follows:

Module 1: Crowdsourcing

The purpose of this module will be to support collaboration and co-creation among the registered CCS professionals, as well as outsourcing microtasks. This module will provide users with the ability to create, request and offer collaboration possibilities directly through the platform. Specifically, users will be able to submit new requests by filling in a specific form with pre-set fields such as category (ex. design), due date/ deadline, description, topic, scope, and so on. Users will then be able to delete, expire or mark as complete such requests by visiting the requests created on a separate dashboard page.

On the offer end, users will be able to explore available requests by visiting a specific search page with specific search query filters based on the fields available to the request submission form. Users will then be able to open the requests on dedicated pages and either a) save them for future reference which they can visit on a special page and/ or b) notify the requesters that they are interested in submitting an offer.

All communication relating to the collaboration of requests and offers, will occur between the users directly through the platform's messaging feature.

It's important to include - in the legal portion of the platform - a clause that states that no liability arises on behalf of the platform / the consortium implementing the project, with regards to the service provided (which is as is), and as such users are responsible for double-checking the information before accepting requests, offers and/or communicating with other users over such issues.

The workshop conclusions were that this module should:

- Have a friendly user interface with different sections for requests and offers. As far as requests are concerned, they should be available only to registered users. Moreover, a dashboard will be created, where users can review their submitted requests with basic control options.

- Registered users can search requests available through a dedicated page, with the use of specific search/filtering queries. Offers are then handled directly between the users, through any means of communication, such as the platform's direct messaging feature.

- The platform will also offer a dedicated view of each request with two interaction options, a) ability to save the request in a special dashboard and b) ability to notify the requester with the interest of submitting an offer.

- Be developed with a low entry barrier/ small learning curve. In particular, the platform will offer appropriate helpful descriptions on each page, appropriate helpful labels where deemed necessary on fields and values displayed on the platform, relative action-reaction messages, such as an alert of the successful notification of the requester.

- Be presented in the form of a request/ offer feature.

- Offer tips or advice of how one could ask for assistance through appropriate labels and descriptions on the request submission form.

Module 2: Best Practices Presentation

Based on the discussions focusing on this module of the platform, it was concluded that this section should be regarded as a repository of documents, which the users could access in order to get ideas, learn new skills, find new case studies, stay informed, and get motivation and so on. In terms of the functionalities of the platform, the participants agreed that it should:

- Provide different post types, such as news, practices, tips, advice, etc., as well as different categories (for example design, website, marketing, collaboration, etc.).

- Provide information on the practices selected, so that the users could obtain all necessary information.

- Focus on both the creative sectors, but also the business one, offering tips and advice.

- Be populated with content which would provide inspiration to the users.

Module 3: Community building

This module should serve the purpose of bringing professionals from the cultural and creative sectors to share ideas, ask for advice, get peer to peer feedback, share experiences and know-how. In addition to these options, the participants consider that the module could also offer the possibility to the users to foster creative problem-solving, get inspiration from one another, and find resources that they might need. To achieve that, the platform should:

- Provide the users with the possibility to create groups through a multistep process.

- Allow the creation of new groups openly available to all users of the platform. These groups will offer the ability to allow other users to join (after approval by the group's moderators and creator), to create new posts and reply on posts in the form of discussions.

- Offer notifications to the users, either as a notification alert on the platform or an email, based on their preferences.

- Allow users to change their profile picture and customise the description of the group, based on its content.

- Offer search options and filters for users to explore specific groups based on specific criteria such as most active, recently active, newest, etc…

- Assign different roles to the users, based on their interactions and quality of replies, and to include a community manager, which could be a prominent figure of the sector.

Module 4: eLearning

Through this module, users will have the possibility of accessing the training programme developed by the partners, under IO3. As per the experts' feedback, the platform should:

- Be populated with audiovisual material to make the participation in the programme more attractive.
- Provide sections and relative information to the programme.
- Users will have the ability to submit feedback through a special submission form. This form and its submissions will be moderated and reviewed by the platform's moderators
- Include forms for self-reflection/ self-evaluation.
- Offer users the ability to connect and message the teacher through the platform's universal user and direct messaging features.
- Offer the different courses in a modular way, so that each user can select which ones to attend.
- Offer users the ability to join special groups, so as to provide an alumni community space for peer to peer communication, following the successful attendance of the course.

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ANNEXES

Annex I

ENVISION | MASTER SURVEY

https://docs.google.com/forms/d/12nXnFLgTv9eBuW8CsVGmsF-yTk1BFo1qqo7kwnlXJxI/edit

ENVISION | ITALY SURVEY

https://docs.google.com/forms/d/1YanHy5gM_LU3REUUXnnwZ8teH7FeQaV6b0Y1S-Ax7Fk/edit

ENVISION | SPAIN SURVEY

https://docs.google.com/forms/d/18K2daTG799_eisGywAJkB43iJrIn7ANkI-yy9tziW0Y/edit

ENVISION | CYPRUS SURVEY

https://docs.google.com/forms/d/1o43-3676ja7g02AIbxaw1h4p-zAFboYbk43MkliHZk8/edit

ENVISION | GREECE SURVEY

https://docs.google.com/forms/d/1qiGUAMXKYvINEMf6Oq92gh5JHPXVN9QyUwsNopf5wzQ/edit

ENVISION | NETHERLANDS SURVEY

https://docs.google.com/forms/d/108n2kynhJwacKBx7VvzxqsuoyR6DjqW5vSXjGMNF8uE/edit

Annex II

ENVISION | ITALY QUESTIONNAIRE REPORT

https://docs.google.com/document/d/1t_EWgJz147PmmJp3fenon_RvR2_egnyu/edit

ENVISION | SPAIN QUESTIONNAIRE REPORT

https://docs.google.com/document/d/1XOy3Gz0mbbHqDWq8av9UI-oMTt8dBroI/edit

ENVISION | CYPRUS QUESTIONNAIRE REPORT

https://docs.google.com/document/d/1Bn2Jrtdya9y6sEJ1guG7Ga2lY367ZOrV/edit

ENVISION | GREECE QUESTIONNAIRE REPORT

https://docs.google.com/document/d/1BHr22Pwr1AqinrX3B6YrDHEN4Piuu0NK/edit#

ENVISION | NETHERLANDS QUESTIONNAIRE REPORT

https://docs.google.com/document/d/17so_Lmw5eEliK78GnO0v7XNDLqutIpqs/edit#

Annex III

ENVISION | ITALY ECOSYSTEM MAPPING REPORT

https://drive.google.com/drive/folders/1AydDrdXaY5FWQ9udonIM0xNoPfd4Zo1V

ENVISION | SPAIN ECOSYSTEM MAPPING REPORT

https://docs.google.com/document/d/1oZMgXjMs-FqdQ8fsLbGFzpt-Q5Nr_roo/edit

ENVISION | CYPRUS ECOSYSTEM MAPPING REPORT

https://docs.google.com/document/d/1HvEut1F48VPfRzfEdCr66bhaMqJD-FDJ/edit

ENVISION | GREECE ECOSYSTEM MAPPING REPORT

https://drive.google.com/drive/folders/1pJVgDeaL512neSBOWIHje-KudzuIhlc1

ENVISION | NETHERLANDS ECOSYSTEM MAPPING REPORT

https://drive.google.com/drive/folders/1-D_UQmYh_cUDmEDsicFxzKBSTt1UIi2c

ENVISION | EXPERIENCE ENGINEERING WORKSHOP REPORT

https://docs.google.com/document/d/1umFOHDwLuT9hTJzFHTNlu3DuBk7hEMtF/edit