

State of the Art and Mapping of Competences Report



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ArtS – Skills for the Creative Economy

R2.1. State of the Art and Mapping of Competences Report

WP: Defining Sector Skill Shortages and ECVET Strategy

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1. Introduction

This document is the synthesis Report of the Mapping of the competences in the Culture and Creative Sector (CCS) carried on in Greece, Italy and Spain. The Authors of the national reports gave all the documents and information on which the results and comments are based.

The National reports were realized by:

→ *CUP Consorzio Universitario Piceno (ITALY)*

→ *Athens Chamber of Tradesmen (Greece)*

→ *FVEM, Federación Vizcaína de empresas del metal (Spain)*

The comments and the attempt of comparison are in full responsibility of the Authors of the Summary report. The primary idea that comes in mind when we think of the so defined “art professions” or “creative professions” is related to the idea of defining, validating, maintaining, and reproducing certain categories of actions, related to what is generally accepted and defined as “cultural category of art and craft”, in order to produce an economic added value that it is clearly expected as “added” to the cultural and humanistic values.

The creative sector is distributed through a network of institutions (schools, museums, galleries, commercial market systems, and industries), all of which participate in constructing a global, international system or network of networks for Art and creativity.

The skills related to the Art world and to the creative sectors are thus part of the modern systems of *competences*, and many parts of these networks are now highly professionalized and organized in an industrial way.

The creative economy is difficult to define and measure. However, we have the opportunity to identify not totally satisfactory attempts to find common terminology and streamline statistical data. Furthermore, if we take into account the Cultural and Creative sector in all the EU Countries and in the rest of the world, matters become even more complex with diverse cultural issues fusing into other definitions.

Even if finding and investigating common definition is not the aim of this report, anyway this complicated debate is one of the reasons of the fascination and specificity of the creative industries which ‘refuse to lie down and be measured like other sectors of the economy. And that is why economists and statisticians will probably never stop debating how to define them and how to estimate their worth’ (Newbegin 2010).

The rise of these cultural and creative sectors as an ‘industry’ has also brought resistance from numerous

artists and creative practitioners who do not want to associate themselves or their work with the post-industrial consumerist conditions set by 'industry'. They prefer to see themselves as individual creative practitioners who are closer to social activism and cultural value than industrial workmanship. Without undermining the social and intrinsic value of the cultural and creative sectors, which in themselves add value to the economic discourse for cultural and creative potential, those championing these sectors are also aware that the process of validation for the sector and its specificities cannot be approached without an 'industry' lens. This is the process which has revolutionised political agendas in the last decade and which set an important cultural agenda in numerous countries, regions and cities. The most successful managed to fuse the grassroots social and cultural values with the discourse on markets and growth.

The term 'creative industries' in public policy formulation is largely attributed to the UK's Department of Culture, Media and Sport (DCMS) which denoted 'those industries that have their origin in individual creativity, skill, and talent and that have a potential for wealth and job creation through the generation and exploitation of intellectual property'. UNCTAD defines the creative industries as being comprised of activities 'at the crossroads between arts, business and technology' and which produce 'symbolic products with a heavy reliance on intellectual property' (UNCTAD, 2004, 2010). The professionals and organizations involved in the cultural development with an economic significance are beneficiaries of the same drivers propelling the growth of the knowledge economy. The rapid growth of intangible investment has created a buoyant market for advertising, computer software services and design, which together constitute a revenues of €535.9b, the creative and cultural industries (CCIs) contribute to 4.2% of Europe's GDP. The sector is its third-largest employer, after construction and food and beverage service activities, such as bars and restaurants. More than 7 m Europeans are directly or indirectly employed in creative and cultural activities — 3.3% of the EU's active population. Performing arts (1,234,500), visual arts (1,231,500) and music (1,168,000) employ more than 1m people each, followed by advertising (818.000), books (641.000) and films (614.000). (*Studio EY France – 2014*)

In overall terms, the so-defined creative industries are beneficiaries of the same drivers as the knowledge economy. The evolution of the markets in these sectors generates rapid growth in demand for all forms of creative expression, some of those even not really well defined and "institutional". The other compressive phenomenon is the digitisation of the products that allows new form of communication and new channels of distribution, having as a consequence the creation of new competitive challenges and new potential for experimentation and co-creation with consumers (see the potential developments of the 3D printing). In these respects the creative industries should be regarded as one of the more dynamic components of the knowledge economy. In fact each creative industry has a core communal business model. All originate ideas of 'expressive value', which they commercialise. Other parts of the economy certainly engage in creative acts of origination – and in the knowledge economy there is an increasing reliance on creatively originating new offerings and experiences. Moreover every part of the economy commercialises their outputs and offerings by pricing them in markets. But these activities are defined by having a practical function. What is distinct about the creative industries is that their revenues are largely generated by commercialising 'expressive

value’ and that necessarily a greater part of their commercial turnover is attributable even more so than other parts of the knowledge economy to acts of genuine ‘creative origination.’

The main goal of this mapping report is to compare the situation of the professional competences related to the creative industries with specific references to support the identification of the current and future skill requirements of the CCS labour market in Greece, Italy and Spain in order to develop innovative joint training programme which will provide sectors with the mix of skills needed for creative entrepreneurship.

The report covers the main relevant areas of the CCS and in particular Craft, Cultural Heritage, Design, Music, Visual arts, Literary arts and Performing arts, Media and audiovisual.

The methodology described in detail in the related section has followed the idea that in order to achieve positive economic results in these impact areas we need to improve in relevant way the level of transversal skills. The economic and social contexts of the regional situations was analysed because it provides conditions that boost creativity and entrepreneurial behaviour (Clare, 2013; Florida, 2002; Lee et al., 2004). It is largely affirmed in previous studies that creative industries are most likely to flourish in larger cities (cf. Boix et al., 2013; Lazzeretti et al., 2008; Lorenzen and Frederiksen, 2008; Power, 2002). In general, urban contexts provide better access to technology and to financial and economic resources and infrastructure. In urban contexts is also easier to find formal and informal learning opportunities. However, Greece, Italy and Spain are countries where a relevant part of the creativity spirit is disseminated also in geographical marginal areas and the role of the policy makers should also create a positive context for enhance factors that can attract creative industries with knowledge and innovative externalities in de-located areas. To construct a conceptual framework for examining the contribution of these analysed countries to the creative industries, we have to take into account different factors comprise human capital, economic and entrepreneurial climate, potential markets, urbanization economies, and institutional factors, but first of all we have to take into account the trend of the selected competences and the needs in term of innovation in the skill the creative business operators have to show to face the growing competitiveness. To start a creative business, creative people are required. Such people are generally young in spirit and are more able to adapt to new knowledge and technology (Florida, 2012). They are generally—but not necessarily—highly educated (Florida, 2012). These people are expected to possess the required entrepreneurial skills for improving the economic value of their products (Potts, 2007; Potts et al., 2008). Entrepreneurial skills also enable creative entrepreneurs to search for new opportunities and to reduce risks in order to develop their business (Sawyer, 2012). The concentration of creative industries is therefore likely to be supported by a talent pool of young creative people and university graduates, including in the developing world. Many developing countries have experienced ‘demographic bonus’, so they might benefit from the increasing participation of young people in the labour market (Lam, 2006). However, this does not merely mean that these youngsters would start creative businesses and form a cluster of creative industries. This is to say, there should be other factors triggering the formation of creative businesses and networks between them, such as university education and spinoffs.

In general, and not specifically in the Countries involved in the mapping, creative industries are associated with post-industrial cities, where service industries dominate the economy (Flew, 2002). These firms might become the potential consumers of creative industries, especially those requiring specific services, such as advertising, publishing and multimedia services. Creative industries are also focused on continuously monitoring trends and consumers' taste in uncertain and rapidly changing markets (Caves, 2000; Pratt, 2008; Reimer et al., 2008). However, as they generally have extensive networks and are supported by information technology (IT) and social media, their markets are not necessarily limited by their locations (Florida and Jackson, 2010). We might therefore expect that creative industries will prefer urbanized areas and fairly advanced regions with adequate connectivity to the ICT infrastructures and with the consequence opportunity to support the e-development of the employment trends.

It is worth to be mentioned that the mapping shows how the distribution of the employment opportunity strongly related to the major urban areas appears to be in contradiction with the distribution of the creative climate. In countries as Italy where, for instance, the distribution of the culture heritage resources is highly distributed along the smallest towns not related business opportunities can be shown, relegating the most of the positive employment trend to the biggest cities.

The mapping allows creating a relevant discussion for what is concerned the cultural climate in the territories and the related economic conditions that might determine the regional distribution of creative industries. The research at local level together with the opinions expressed by relevant stakeholders contribute to affirm that a favourable entrepreneurial climate and culture is something a priority in the three countries in order to encourage operators to seek out new opportunities and start new businesses and related employment opportunities. Creative entrepreneurs and employers can be better located in areas characterized by creativity, diversity and innovation, but it is possible especially thanks to some pre-conditions: connectivity, training and public support. It is thus uncertain whether creative industries are started by a creative recognition of economic opportunities, in which the existence of educative institutions plays a role.

In any case, we have to bear in mind that it is generally accepted that Creative industries have been found to benefit from urbanization economies which support innovation and flexibility by facilitating information flow and interaction networks (Scott, 2006). Frequent interactions and knowledge transfer are required to generate innovation. The Mapping realized in Greece, Italy and Spain shows that creative industries are found to induce cross-fertilization of skills. A diversity of skills can encourage creative firms to collaborate with each other, which will enhance the competitiveness of the environment.

The development of technical skills is necessary for creating the needed social and economic context. However, we can assume that we have to develop also 'soft' factors, such as urban positive relationships, quality of life, and social diversity that are associated with the locational patterns of creative industries or occupations. For creating a positive context soft skills are needed either.

Skills as self-management, team-working, business and customer awareness, problem solving, communication and literacy, application of numeracy and application of IT represent the crucial point and they are key attitudes necessary to compliment the technical and artistic requirements.

These attitudes will enable people to be open to possibilities and challenges while also as being able to think innovatively.

The Creative Industries are considered as one of the most promising fields of economic activity in highly developed economies, but also a promising sector to contribute to a significant job creation. The Mapping shows that Creative Industries in Greece, Italy and Spain develop innovations as part of a new or changing business activities. Such innovations include new products and services offered to their customers (product innovation) as well as new technologies, procedures and routines within their business that raise efficiency or quality of their output (process innovation). This requires the mentioned factors and a new marketing approach offered by companies that can support the efforts of individuals and groups. Furthermore, the Creative Industries support innovation in other industries through creative inputs. These inputs can either be downstream, i.e. creativity produced in the Creative Industries is used by customers in their innovative efforts, or upstream, i.e. the Creative Industries demand innovative inputs from their suppliers (e.g. technology producers). Creative inputs need not necessarily coincide with the Creative Industries' own product innovations but may also relate to standard (i.e. non-innovative) activities of creative enterprises.

Measuring the performance in terms of innovation was not along the goals of the Mapping, however reading the results in terms of employment trends and skills needs the Mapping allows to verify transversal concepts used to measure innovation in other industries, as presented in the methodological recommendations produced by the OECD and Eurostat's (2005) "Oslo Manual".

Finally, mapping the trends in the sectors related to the Creative Industries requires a proper definition of these areas. Throughout the literature different methodologies have been developed in order to delineate the cultural and creative sector in Europe. All these different methodologies can be subsumed by four general approaches: the "Creative Industries approach", the "Copyright Industries" approach, the "Experience Economy" approach and sector specific studies (see European Commission, 2006). In this study, we follow the "Creative Industries" approach, applying a conceptual definition of this sector proposed by the Creative Industries Task Force of DCMS. They describe Creative Industries as "industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property" (DCMS, 1998)

In any case we need to consider that the skills qualified for being a "creative competences" engage a potential discussion expressly referred to the areas of impact, but involving also the consideration of transversal competences. The areas taken into account are those related to this list of activities

- Content: film, (computer) games, journalism, authors, music, performing arts, photography, sound studios;
- Design: arts and crafts, design and fashion, graphic design, engineering design, web design;
- Architecture: architecture including landscaping and urban planning;
- Advertising: planning, creating and putting in place advertising campaigns, public relations management, market research, advertising services;
- Software: programming and computer services (excluding web design and computer games);
- Publishing: publishing of books, newspapers and other printed matter, including printing services.

Concerning the definition of competences follow the ECVET approach where competences is “The proven ability to use knowledge, skills and personal, social and/or methodological abilities in work or study situations and in professional and personal development.”

2. Methodology

Being at the crossroads between arts, business and technology, cultural and creative sectors are in a strategic position in terms of European knowledge-based growth, in terms of innovation and in terms of impacts and spill-overs in other economic sectors, where their importance as key underlying assets is increasing.

The CCS has some “peculiar” characteristics¹:

- Most of the firms are small (employing fewer than 10 people), and most of the workers are highly skilled self-employed professionals.
- In addition, many people within the creative industries work part time and/or have temporary contracts.
- Creative industries also often feature a high degree of networking, an intensive supply chain and other inter-firm linkages, and are concentrated in major cities.
- Policy considerations have recently also shifted to the creative industries located outside of large metropolises and to the role they could play as a regional development factor.
- Cultural and creative products are often short lived with a high-risk ratio of failure over success. The market for cultural products is highly volatile, dependent on fashion and trends with uncertainty in demand. Some sectors are strongly “hit driven” (cinema and music for instance).

¹ Bruno Moriset. Building new places of the creative economy. The rise of coworking spaces. 2013. <halshs-00914075>. The Entrepreneurial Dimension of the Cultural and Creative Industries, Utrecht. School of the Arts (Hogeschool voor de Kunsten Utrecht, HKU) Rene Kooyman. David Crombie and, Emma Tilquin I.NDL, 2010. Higgs, Peter, Stuart Cunningham and Hasan Bakhshi (2008), Beyond the Creative Industries: Mapping the Creative Economy in the United Kingdom. London: National Endowment for Science, Technology & the Arts (NESTA).

- Companies evolve in a fragmented market, based mainly on structural constraints linked to the features of local markets.

But what makes creative industries different from other sectors is the skills imbalances that in the cultural and creative fields are well-acknowledged. The issue is therefore not whether there is any 'creativity, skill or talent' in a sector, but the extent of it. At some point, an industry has a sufficient proportion of 'creativity, skill and talent' to be deemed to be part of the Creative Industries, with other sectors falling below this arbitrary benchmark. This is further compounded by the fact that we do not have an adequate measure of what creativity actually is. Anyway, the CCS is bounded and fueled by the creativity as a common factor, their renewable source of energy.

Other than this in the CCS seems increasingly decisive the mix of skills, the multidisciplinary rather than the uniqueness of knowledge occupation-specific, often characterized by poor versatility. This element is even more significant considering the cultural and creative professions bearers itself tendencies to contamination and the continuous search for originality, or even of uniqueness.

The CCS requires soft skills and the ability to move in a varied "fields of knowledge". Of course the range of transversal skills vary a lot in relation to the different professions in the different creative and cultural sectors.

In this framework the Mapping of the Competences in the Cultural and Creative Sectors investigates the current situation and trends in the CCS and tries to define the most competitive, high valued skills in the three countries under investigation: Italy, Spain and Greece.

The three countries, characterized by a high-culture creativity, have strong similarities in terms of the endowment of human, cultural and artistic resources, which are regarded as creative from a traditional point of view. But of course they also present some differences in terms of distribution of the employment in the different creative sectors, in terms of "urbanization trend" of the creative industries and in relation to the spatial, social and economic dimensions of creativity.

The Report, based on national studies realized in the three countries under investigation, aims to define a conceptual framework for examining the CCS taking into account different factors comprising human capital, economic and entrepreneurial climate, potential markets, but first of all the trend of the transversal competences and soft skills.

The aim is to explore and record the dynamics of the Creative and Cultural Sector through a detection and a definition of the substantial horizontal and soft skills required in various branches, stating the idea that in order to achieve positive economic results in these impact areas it's important to improve in relevant way the level of transversal skills.

The methodology for the analysis uses a **5-step empirical approach**.

1- As for the definition of the current situation and trends in CCS in the three countries a comprehensive overview of the relevant framework conditions was analysed using the available sources (desk-research): this sub-task included an in-depth analysis of information on the Classification of the cultural and creative sector and industries, on the Mapping of the economic contribution and of the employment in the cultural and creative industries. The data of comparative trends are gathered from the available aggregate information using existing national sources and EC publications, business publications, academic articles and other relevant sources. Both primary and secondary data are analysed, including policy documents, scientific articles, job advertisements, regional, national and EU level statistics, resources from Cedefop/Skillsnet and Eurostat etc..

2- Concerning the description of the professional contexts, of the transversal skills as well as the competences analysis, the method is based on a descriptive research as it includes surveying and fact-finding. The structure of the analysis is based on the identification and description of the transversal competencies and soft skills that are the most critical in the CCS and that can be seen as priorities for skills development in order to face the challenges of the sector.

3- For a deeper understanding, a stakeholders analysis was conducted in the three countries. These stakeholders form a spectrum of interested parties ranging from organization's representatives to employed in the CCS, from professionals in the field to public representatives operating in the cultural and creative sector. Data and information were collected through a qualitative research that included on-site visits, focusing activities, observations and/or individual in-depth and semi-structured interviews through questionnaires. The information were then integrated by secondary data such as press releases, reports and local newspapers articles.

4- The focus on the pedagogical trends and on the training methodologies is realized as additional desk-research. It's based on the growing consensus about the facts that Creative industries require a positive and innovative approach on education and learning as the consequence of the necessity of innovative skills and as a contribution to the needed innovative approaches in term of learning and didactic strategies.

5- Finally some collection of good practices in the three countries were defined. The practices are referred to different areas, such as:

- development and reinforcement of adaptive competence
- new training approaches
- new strategy for the inclusion of the professional profiles of the CCS sectors in the labour market

A common definition of what best practices is was used. A practice can be considered as a “best practices” when it “emphasizes function and orientation on process, transformation and innovation (Tuominen,

Koskinen-Ollonqvist, and Rouvinen-Wilenius 2004, 7, 27).

Other than this the practices are really BEST when:

- Consider the opinion of relevant stakeholders
- Deliver consistent outcomes
- Minimize resources, maximize results

The analysis gives a *helicopter view* that in this case means giving an overall picture of the practices development in the countries rather than having a one-sided perspective.

All the collected evidences and relevant data represent the key findings from which practical recommendations are defined as the last step of the report.

3. Current situation, trends and short and medium term changes in the CCS

CCIs comprise those industries producing or distributing cultural and creative goods and services, defined in 2005 by UNESCO as ***“activities, goods and services, which....embody or convey cultural expression. Irrespective of the commercial value they may have.”***

Cultural and creative sectors include all sectors whose activities are based on cultural values and/or artistic and creative expressions, whether these activities are market or non-market oriented and whatever the type of structure that carries them out. These activities include the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or creative expressions, as well as related functions such as education, management or regulation. The cultural and creative sectors include in particular architecture, archives and libraries, artistic crafts, audio-visual (including film, television, video games and multimedia), cultural heritage, design, festivals, music, performing arts, publishing, radio, and visual arts.

THE CULTURAL SECTOR	Non-industrial sectors producing non-reproducible goods and services aimed at being "consumed" on the spot (a concert, an art fair, an exhibition). These are the arts field (visual arts including paintings, sculpture, craft, photography; the arts and antique markets; performing arts including opera, orchestra, theatre, dance, circus; and heritage including museums, heritage sites, archaeological sites, libraries and archives).
	Industrial sectors producing cultural products aimed at mass reproduction, mass-dissemination and exports (for example, a book, a film, a sound recording). These are “cultural industries” including film and video, video-games, broadcasting, music, book and press publishing.

THE CREATIVE SECTOR	In the “creative sector”, culture becomes a “creative” input in the production of non-cultural goods. It includes activities such as design (fashion design, interior design, and product design), architecture, and advertising. Creativity is understood in the study as the use of cultural resources as an intermediate consumption in the production process of non-cultural sectors, and thereby as a source of innovation
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Delineation of the cultural & creative sector

The

CIRCLES	SECTORS	SUB- SECTORS	CHARACTERISTICS
CORE ARTS FIELD	Visual arts	Crafts Paintings – Sculpture – Photography	<ul style="list-style-type: none"> • Non industrial activities. • Output are prototypes and “potentially copyrighted works” (i.e. these works have a high density of creation that would be eligible to copyright but they are however not systematically copyrighted, as it is the case for most craft works, some performing arts productions and visual arts, etc).
	Performing arts	Theatre - Dance – Circus - Festivals.	
	Heritage	Museums – Libraries - Archaeological sites - Archives.	
CIRCLE 1: CULTURAL INDUSTRIES	Film and Video		<ul style="list-style-type: none"> • Industrial activities aimed at massive reproduction. • Outputs are based on copyright.
	Television and radio		
	Video games		
	Music	Recorded music market – Live music performances – revenues of collecting societies in the music sector	
	Books and press	Book publishing - Magazine and press publishing	
CIRCLE 2: CREATIVE INDUSTRIES AND ACTIVITIES	Design	Fashion design, graphic design, interior design, product design	<ul style="list-style-type: none"> • Activities are not necessarily industrial, and may be prototypes. • Although outputs are based on copyright, they may include other intellectual property inputs (trademark for instance). • The use of creativity (creative skills and creative people originating in the arts field and in the field of cultural industries) is essential to the performances of these non cultural sectors.
	Architecture		
	Advertising		
CIRCLE 3: RELATED INDUSTRIES	PC manufacturers, MP3 player manufacturers, mobile industry, etc...		<ul style="list-style-type: none"> • This category is loose and impossible to circumscribe on the basis of clear criteria. It involves many other economic sectors that are dependent on the previous “circles”, such as the ICT sector.

: “the cultural sector”
 : “the creative sector”

contribution of culture and creativity to societal development is increasingly being recognized in Europe, as demonstrated by the attention being given to the development of the cultural and creative industries (CCIs).

Very few economic sectors have generated as much expectation at EU level as CCIs have in the last few years. The positive results of these knowledge-based sectors on the economy in terms of growth, employment and innovation is increasingly being recognized and quantified at European level.

According to the latest data available in 2011, the creative industries of the economy in the EU-27 created a total value of EUR 535.9 billion €, representing approximately 4.2% of total European GDP and 8.3 million full-time jobs, 3.3% of the EU's active population (Studio EY France, 2014).

Indicative of the importance attributed to the creative and cultural industries in Europe are the initiatives aiming at the development of policies at the national and regional level to support and promote them. For instance, the CCIs are a priority aspect of the **Council's Work Plan for Culture 2011-2014**, and the significance of the CCIs is highlighted in key policy documents, including the **Europe 2020 Strategy** and its flagships, **the Innovation Union, the Digital Agenda for Europe, the Agenda for New Skills and Jobs**, and **the Commission's recent Intellectual Property Rights (IPR) Strategy**. Harnessing and enhancing the contribution of culture, creativity and the CCIs to innovation, wealth creation and social welfare are amongst the fundamental aims of these national, regional and EU policy initiatives. In this framework, we have to underline that **the cultural and creative sectors also contribute significantly to youth employment**, employing, on average, more young people than any other sector. When it comes to sectors, visual arts, performing arts and music account for about half of all employment in the cultural and creative sectors.

Economists and politicians have long overlooked the importance and potential of the cultural and creative sectors. Their apparent heterogeneity — ranging from large film production companies to tiny SMEs, and from architecture to video games, as well as performing arts and publishing, has slowed their recognition as an economic sector.

In addition, **the cultural and creative sectors are now seen as essential drivers of innovation**. Long-term structural changes in our societies towards a knowledge-based economy have led to new forms of non-technological innovation in which **"culture-based creativity" plays a key role**. People today attach more importance to the "experience" and/or "immaterial" values embodied in products and services than to their functionality. Consequently, investing in "culture-based creativity" is beneficial not only for the sector itself but also for innovation in other sectors. As shown by a recent **KEA study** completed for the European Commission, "culture-based creativity" helps to stimulate and develop product and services innovation, plan branding strategies, trigger creativity among staff within non-creative sectors or trigger new business and technological practices. **Creativity produces a spill-over effect on the overall economy**.

Last but not least, culture and creativity also trigger innovation in a diverse range of social areas. Design thinking can help restructuring public services, while arts projects carried out in collaboration with local communities can help to innovate the way local governments pursue social policy objectives such as integration, social cohesion, health care and crime prevention.

Culture and innovation play also a crucial role in helping regions to attract investment, creative talent and tourism. Although we are living at a time where information technologies have abolished distance and time constraints, “physical location” and the “socialization” factor remain decisive for economic success. Culture has become an important soft location factor and a key factor for boosting local and regional appeal. In this regard, developing cultural and creative clusters to increase local competitiveness is becoming more and more important. In areas where there is cultural activity there is a great deal of formal and informal trading of tangible elements (material, equipment) and intangible elements (knowledge, know-how) which is easier to achieve within a limited and densely populated area.

It has been shown that CCIIs have a major impact on Europe at different levels. The EU therefore has a key role to play to support the sector. The characteristics of cultural and creative goods are that they cater essentially for a local audience, its languages and cultures. This makes it difficult for the production of cultural goods and services to move to other continents. Therefore off-shoring is less developed than in other sectors of the economy (even at manufacturing level). Because of this characteristic (non-delocalisation), and given that Europe is a major producer of intellectual property assets, it would be well advised to try and make the most out of this potential to boost its economy.

Secondly, there is a competitive race to attract talent and creators (“the creative class”) to local environments supporting the clustering of creativity and innovation skills. Europe risks experiencing a talent drain in sectors such as video games and cinema attracted abroad by better conditions, essentially financial.

Finally, the added value of culture as a key driver for Europe’s tourism should also not be underestimated. Europe’s cultural and creative assets make the sector one of Europe’s most successful industries, accounting for 5.5% of the EU’s GDP with Europe holding a 55% share of the global market. Europe is the most visited destination in the world.

The European cultural and creative sector is largely made up of micro, small and medium sized enterprises operating in several sub-sectors which this report groups as follows:

- Craft
- Performing arts (music, dance, theatre)
- Cultural heritage (archives, libraries, museums)
- Literary arts (book and press)
- Visual Arts
- Audiovisual and multimedia.

These companies are extraordinarily creative and able to produce innovative artistic projects, often on a shoe-string budget. Their financial resources are consumed by their production costs, leaving them with inadequate financial capacity to market and distribute their products. The vast majority of music and film companies in Europe are for instance micro-businesses and SMEs. Policies aimed at supporting SMEs at

European level need to take into account the special characteristics of smaller companies in the cultural and creative field.

However, whether large or small, locally based or internationally established, the European cultural and creative sector is **vulnerable**. This is largely due to the heterogeneous political, commercial and cultural environment in Europe as well as to the very nature of the economy for cultural products:

- Cultural products are often short lived with a high risk ratio of failure over success. The market for cultural products is highly volatile, dependent on fashion and trends with uncertainty in demand. Some sectors are strongly “hit driven” (cinema and music for instance).
- Companies evolve in a fragmented market made up of a medley of languages and cultures – accessing the internal market remains difficult for local language products. However, this reality is less the case in sub-sectors such as design, fashion, or visual arts for instance.
- This market fragmentation, based mainly on structural constraints linked to the features of local markets, hinders their international development. Products are marketed for local audiences with different languages but competing with international products with global appeal. The internal market often works better for large international companies active in distribution that are vertically integrated and specialized in the production of mainstream films (blockbuster) or American pop music.
- The market structure is oligopolistic in some sectors (music and cinema notably).

Evolving in a number of different markets and subject to different levels of demand and competition, these companies account for the bulk of employment in the sector and are the main developers of creative talent. The common features of cultural and creative businesses are:

- An organic approach to business growth
- creative entrepreneurs manage passion-driven activities which are often project-led
- Often a lack of business training and financial support.
- Problems in valuing intangible assets.
- A dependence on public investment schemes.
- A lack of organization at trade association levels.
- They evolve in culturally and linguistically fragmented markets.
- Business models challenged by the digital shift.

The financial needs of CCIs are different from those of businesses (or SMEs) in other sectors due to their particular characteristics and the challenges they face. This argues for the development of sector specific tailor-made solutions for access to finance for CCIs.

However, financing needs of CCI's usually vary according to a number of factors, ranging from the company's stage of development, the particular sector and its value chain as well as the nature of the activity that needs finance. One of the main reasons given to explain the limited commercial success of CCI's is the trend to focus on financing projects rather than the company itself. Only 37.2% of cultural and creative companies try to raise finance for the business itself rather than for an individual project.

Yet, they are bounded and fueled by one common factor: creativity, a free and renewable source of energy — a resource which is abundantly present in countries of the European Union. Creativity feeds on culture in its widest possible sense: the extraordinary depth and breadth of European culture is a tremendous asset, a common good which must be protected and promoted.

The competitive advantage of our cultural and creative sectors depends on maintaining a virtuous cycle of creative talent, artistic expression, entrepreneurship and investment, as well as proper reward and remuneration for creators. Enhancing this cycle by fostering the right environment for cultural diversity and creativity in a digital world will surely be a key task for the European Commission.

In the context of the unfolding **EU 2020 Agenda** it seems evident that EU funding will be more widely available to support regional initiatives aimed at CCI's either via structural funds or innovation schemes. The recent initiative of DG Enterprise on the establishment of a Creative Industry Alliance led by local and regional authorities is evidence of this important policy shift towards supporting non-technological innovation in general and culture-based creativity in particular.

The new programmes and instruments within the **Multi-annual Financial Framework 2014-2020**, notably **Creative Europe**, **Erasmus+**, the **Cohesion Policy Funds**, **Horizon 2020**, **COSME** and **Connecting Europe Facility** can make a decisive contribution to support the further development of the cultural and creative sectors and strengthen their contribution to the Europe 2020 Strategy for jobs and growth. Some of the measures should facilitate the internationalisation in the CCS.

The European Commission states in its **Green Paper 'Unlocking the potential of cultural and creative industries'** that ***'There is a lot of untapped potential in the cultural and creative industries to create growth and jobs.'*** The main conclusion of the OPEN METHOD OF COORDINATION (OMC) working group of EU member states' experts on cultural and creative sectors working group is that the same can be said of cultural exports and internationalisation. In the EU, the generally very good preconditions facilitate the creation of successful cultural exports, which can take full advantage of the growing global market. It is fully justified to say that Europe's cultural diversity and rich heritage, combined with the talent of artists and CCS companies as well as high-quality education, together form a distinctive competitive advantage.

However, the OMC working group has identified a number of weaknesses and challenges that need to be addressed by policy makers in order to unlock the full export potential of European culture and creative

sectors. The working group is convinced that each of these weaknesses and challenges can be effectively targeted by appropriate policies and measures that correspond to the actual needs of the CCS.

As regards professional and further education and training:

- develop incentives for interchange between education institutions, providing an international scope to both cultural and creative disciplines and support disciplines (arts management etc.), and promote course exchange between universities or university departments;
- raise awareness of the need to integrate general management and internationalization and export skills in cultural and creative curricula and promote the integration of practitioners;
- support for professional management training (e.g. specific seminars/workshops in collaboration with or carried out by the national export office)
- support intermediaries' participation in training and networking opportunities;
- promote the recognition of skills and professions within the cultural and creative areas, through funding professional associations.

4. Overview of the CCS current situation and trends in Greece, Italy and Spain

Because the creative economy has become a powerful transformative force in Europe, its potential for development is waiting to be unlocked.

These transformational effects of culture and creativity beyond the sectors of cultural and creative industries are of course, within the framework of the Agenda Europe 2020, on the programmes and on the policy initiatives on national and European level. Support provided to CCIs has three main economic goals: to encourage innovative activities, to stimulate growth and create new jobs and to promote the international visibility of national products and services. The non-economic goal – to secure cultural diversity – is also very important for a majority of CCI policymakers.

In the next pages general data about the trend and the occupational standards in Greece, Italy and Spain are analysed to better understand the CCS in these countries and its role in the economic development and in labour market.

The three countries, characterized by an high-culture creativity, have strong similarities in terms of the endowment of human, cultural and artistic resources, which are regarded as creative from a traditional point of view. But of course they also present some differences in terms of distribution of the employment in the different creative sectors, in terms of “urbanization trend” of the creative industries and in relation to the spatial, social and economic dimensions of creativity.

Some relevant indications of comparative trends in CCS in the three countries can be gathered from the available aggregate information (both in terms of primary statistical sources and in terms of previous policy studies on the subject).

4.1 Starting from the definition of CCS in Italy, Spain and Greece

In **Italy** the Commission on Creativity and Production of Culture published the White Paper on Creativity containing a definition particularly suited to describe the Italian situation:

- *Historical and artistic heritage* - represented by cultural heritage, performing arts, architecture, music and contemporary arts;
- *Content, information and communications industry*- where the common thread is the integration of high tech into service design and production (publishing, cinema, advertising, television and radio, software sciences);
- *Material Culture* - focused on the production of services and objects, including the macro fields of fashion, design and industry of taste.

Otherwise, **Spain's** Ministry of Education, Culture and Sport defines the cultural and creative industries as "*a firms which combine the creation, production and marketing of creative content of an intangible, cultural nature. Cultural industries generally include publishing, multimedia, audiovisuals, phonographic recording, film-making, crafts and design.*" "The term "creative industry" refers to a broader range of activities that includes the cultural industry along with all other artistic and cultural output in the form of entertainment or goods produced individually. The creative industries are those whose products or services contain substantial artistic or creative elements. They include also sectors such as architecture and advertising."

According to the definition in **Greece**, the Cultural and creative sectors comprise a large number of significantly heterogeneous sub-sectors and industries which also appear to exhibit diverse features in terms of organization, market structure, economic magnitude and government support across countries or even across regions of a country (HKU, 2010; Henry, 2007). In this regard, one should also expect great variation in the characteristics and challenges of entrepreneurs being engaged in different industries of different countries and regions. These discrepancies in the entrepreneurial environment along with the definition difficulties mentioned above constitute crucial reasons for the limited availability of empirical evidence being applicable over the whole cultural and creative sector.

4.2 Classification of the cultural and creative sector and industries

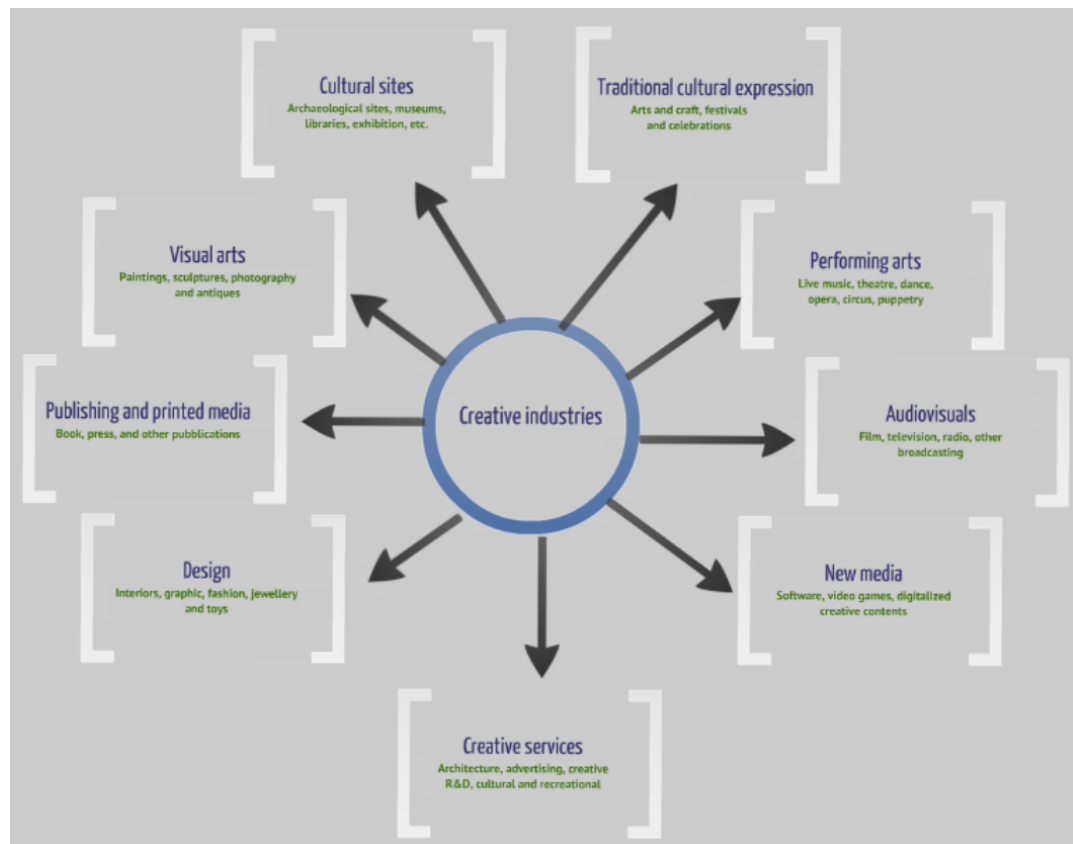
Cultural and creative industries (CCIs) are at the crossroads of arts, culture, business and technology and can be defined as those economic activities that strongly rely on individual creativity, skills and talent and in principal produce intellectual property in contrast to material goods or immediately consumable services (UNCTAD, 2008). Whilst there is a strong consensus, at least in Western countries, that the CCIs offer

significant prospects for individual growth and fulfillment, for social cohesion, and business development, as well as for national prosperity, wealth creation and well-being (e.g., UNCTAD, 2008; CEC 2010), the concept of the CCI is a relatively recent one, with some attributing its emergence to Australia's (1994) *Creative Nation* Report. Two big challenges with understanding the CCIs are:

- Developing an agreed or harmonized understanding of what these activities or industries are; and
- Obtaining statistical data to understand their size, shape, dynamics, and inter-relations with other sectors and activities.

A review of the policy literature indicates that although several questions and issues regarding the definitional coherence of CCIs still remain open, there is increasing consensus on which sectors should or should not be included in the creative industries group. However some debates still exist about the activities that should be considered to belong in the 'core' of the creative or cultural industries.

Among others, one of the wider classifications was elaborated by UNCTAD (United Nations Conference on Trade and Development) and is summarized in the following figure:



Focusing on this classification, the most relevant consideration is that there is a very wide range of "sectors" and activities that can be considered as "creative": from the arts and antiquities to the "creative services" or the production of videogames and toys.

Therefore, despite the legal basis of the “Creative Europe” program is used in this report (by which the “cultural and creative sectors” englobe “all sectors whose activities are based on cultural values and/or artistic and other creative expressions, whether those activities are market- or non-market-oriented, whatever the type of structure that carries them out, and irrespective of how that structure is financed. Those activities include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. The cultural and creative sectors include inter alia architecture, archives, libraries and museums, artistic crafts, audio-visual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts”), there are some differences in the national classification of the three countries.

The **Greece** the Hellenic Statistical Authority uses the NACE classification and foresees the following sectors

Publishing
Printing
Film and video
Photography
Music
Television and Radio
Arts and Entertainment
Libraries and Museums
Cultural Commerce
Architecture
Specialized Design
Advertising
Software

In **Italy** the ATECO categories are the result of the classification of economic activities defined at European level, approved by Community regulation and prepared by the Italian National Institute of Statistics (ISTAT).

Italian economic activities thus match the Nace REV 2 European classification, published on the Official Journal of 20 December 2006 of the EP and of the Council of 20 December 2006).

ATECO categories are classified as clusters; however, many activities - especially those related to creative industries - are rather difficult to summarize in such a concise manner. ATECO presents 12 different categories just for the classification of creative industries, in addition to the even more numerous (about 30) categories concerning related activities.

Process analysis: ATECO activity, sector, dimension

	Sector	Process dimension
creative, arts and entertainment activities <i>includes crafts</i>	theatre, music, crafts, sculpture, etc.	Production creation
Motion picture, video and television programme production, post-production and distribution; music and sound recording	cinema, videos, music (media)	Production creation
programming and broadcasting activities	cinema, videos, music, radio (media)	Dissemination
publishing of books, periodicals and other publishing activities; sound recording and music publishing activities	publishing, writing, music	Production creation
software publishing	IT software	Dissemination
libraries, archives, museums and other cultural activities	museums, widespread and traditional culture	Management
amusement and recreation activities	music (halls), cabaret and theatre	Management
retail sale of cultural and recreation goods in specialised stores		Market
architectural and engineering activities and related technical consultancy	design and architecture	Production creation
specialised design activities	design and architecture	Production creation
advertising	communication and media	Production creation
software production, IT consultancy and related activities	IT software	Production creation

In **Spain** the sectors belonging to the cultural industries are the following:

Heritage	This includes activities associated with the management and operation of cultural heritage sites such as historical monuments, archaeological sites, the natural heritage and museums as a result of their opening to the public.
Archives & libraries	This includes activities associated with archives and libraries.
Books & press	This includes activities associated with books, the press and periodicals in different formats.
Visual & graphic arts	This includes activities associated with painting, sculpture, photography, design and architecture.
Performing arts	This includes a wide variety of live cultural stage productions such as theatre, opera, light opera, dance and concerts of classical and contemporary music.
Audiovisuals	This includes activities associated with film, video, recorded music, TV, radio and other audiovisual formats.
Interdisciplinary	This includes activities that cannot be broken down separately due to a shortage of statistical data.

The sectors are classified under the 2009 CNAE (Spanish National Classification of Economic Activities):

- 181 Graphic arts & associated services
- 182 Playing of recorded media
- 264 Manufacture of consumer electronics
- 268 Manufacture of magnetic and optical media
- 322 Manufacture of musical instruments
- 581 Publishing of books & periodicals and other publishing activities
- 591 Film & video activities and TV programmes
- 592 Sound recording and music publishing activities
- 601 Radio broadcasting activities
- 602 TV programming and TV broadcasting activities
- 741 Specialist design activities
- 742 Photographic activities
- 743 Translation and interpreting activities
- 900 Creative, artistic and entertainment activities
- 910 Activities associated with libraries, archives, museums and other cultural activities
- Any other economic activities that can be considered as a culture-related occupation.

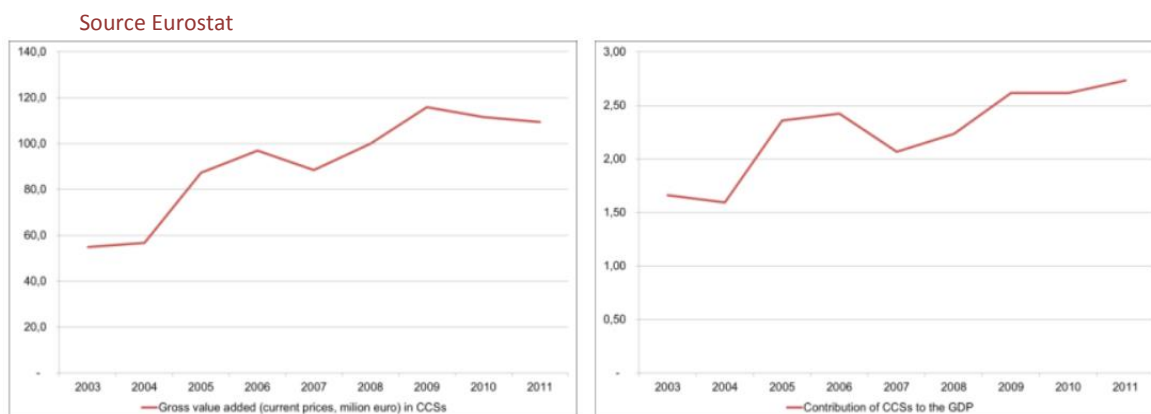
Below the main sectors classified in the three countries under investigation are compared with the NACE and DCMS (2013) taxonomy.

ADVERTISING	73.1 Advertising
ARCHITECTURE AND ENGINEERING	71.1 Architectural and engineering activities
ARTS AND ENTERTAINMENT	90.0 Arts and entertainment activities
COMPUTER PROGRAMMING	74.2 Photographic activities
DESIGN ACTIVITIES	74.10 Specialized design activities
MOTION PICTURE, VIDEO AND TV	59.1 Motion picture, video and television programme activities
PHOTOGRAPHY	62.0 Computer programming, consultancy and related activities
PROGRAMMING AND BROADCASTING ACTIVITIES TV AND RADIO	60.1 Radio broadcasting 60.2 Television programming and broadcasting activities
PUBLISHING	58.1 Publishing of books, periodicals and other publishing activities 58.2 Software publishing
SOUND RECORDING AND MUSIC	59.2 Sound recording & music publishing activities
HERITAGE-RELATED ACTIVITIES	91.01 Library and archives activities 91.02 Museums activities 91.03 Operation of historical sites and buildings and similar visitor attractions 91.04 Botanical and zoological gardens and nature reserves activities

4.3 Mapping of the economic contribution of the cultural and creative industries

The CCSs in **Greece** are very performing. Despite the crisis the GDP related to CCSs has grown and, in 2011, it accounted for a 9,4% more than in 2008 and for a 54,3% more than in 2003. Over the same period, the contribution of the CCSs to the general economy has grown reaching 2,73% of the total GDP.

The following two graphs show the trend of GDP in CCs and the contribution of CCs in the total GDP.



In 2006, the total sales of the CCI's shown in the following Table was 11.7 billion € while the total increase in sales between 2000 and 2006 was 69.1% (i.e. an average sales increase per year of 10%). Taking into consideration that the increase of the Greek GDP during the same time period was 23% one can easily understand that cultural and creative industries in Greece grew at much higher rate compared to the growth rate of the national economy between 2000 and 2006.

Annual turnover of 13 CCIs

	Turnover				
	2000	Percentage in 2000 (%)	2006	Percentage in 2006 (%)	D 2000-2006
Publishing	1,048	15.1%	2,115	18.0%	101.8%
Printing	850	12.2%	1,126	9.6%	32.5%
Film and video	452	6.5%	822	7.0%	81.9%
Photography	153	2.2%	180	1.5%	17.6%
Music	14	0.2%	135	1.1%	864.3%
Television and Radio	478	6.9%	1,389	11.8%	190.6%
Arts and Entertainment	439	6.3%	377	3.2%	-14.1%
Libraries and Museums	14	0.2%	223	1.9%	1492.9%
Cultural Commerce	508	7.3%	854	7.3%	68.1%
Architecture	1,020	14.7%	1,301	11.1%	27.5%
Specialized Design			71	0.6%	
Advertising	1,580	22.7%	2,186	18.6%	38.4%
Software	401	5.8%	988	8.4%	146.4%
Total	6,957	100.0%	11,767	100.0%	69.1%

Source: Avdikos (2014)

In 2006, the number of firms active in the 13 CCI's was 71,291 (Table below), i.e. it followed the increasing trend in sales and grew significantly (63.5%) since 2000. The most important sectors in terms of sales were advertising, publishing, television and radio and architecture, while the majority of young firms which began their operation between 2000 and 2006 were active in music, libraries-museums, cinema-video and software.

Number of businesses in 13 CCI's

	Turnover					
	2000	Percentage of total	2006	Percentage of total	D 2000-2006	Average turnover per firm
Publishing	1,878	4.3%	2,802	3.9%	49.2%	754,818
Printing	4,754	10.9%	4,323	6.1%	-9.1%	260,467
Film and video	1,365	3.1%	3,890	5.5%	185.0%	211,311
Photography	2,311	5.3%	3,320	4.7%	43.7%	54,217
Music	103	0.2%	519	0.7%	403.9%	260,116
Television and Radio	774	1.8%	1,184	1.7%	53.0%	1,173,142
Arts and Entertainment	6,673	15.3%	10,066	14.1%	50.8%	37,453
Libraries and Museums	247	0.6%	905	1.3%	266.4%	246,409
Cultural Commerce	3,976	9.1%	5,488	7.7%	38.0%	155,612
Architecture	17,280	39.6%	27,183	38.1%	57.3%	47,861
Specialized Design			2,284	3.2%		31,086
Advertising	2,860	6.6%	5,513	7.7%	92.8%	396,517
Software	1,381	3.2%	3,814	5.3%	176.2%	259,046
Total	43,602	100.0%	71,291	100.0%	63.5%	165,056

Source: Avdikos (2014)

The growth of the cultural and creative sector in Greece has been greater compared to that of other sectors of the domestic economy while at the same time CCI's turnover is much bigger than that of many traditional sectors. Therefore, it is clear that CCI's are a very significant part of the Greek economy.

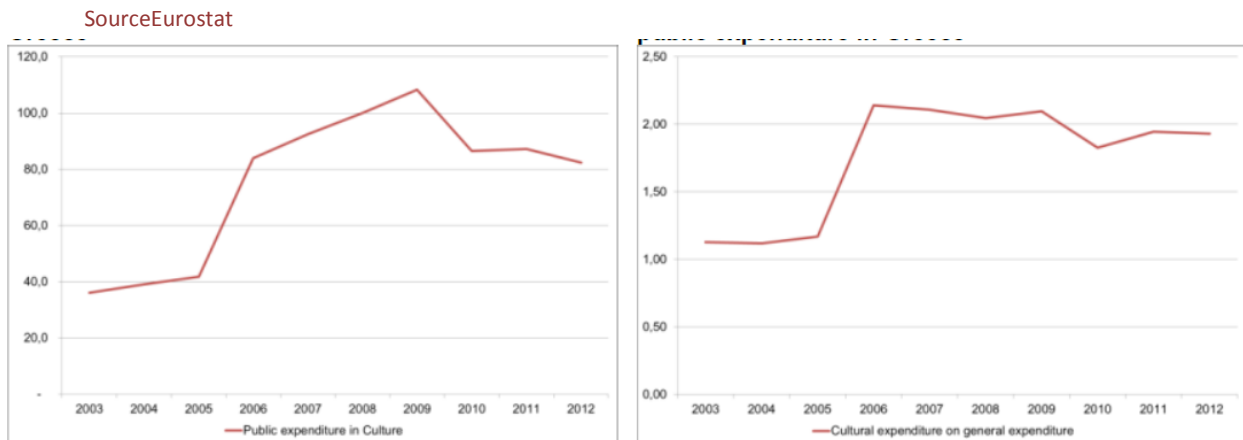
The economic crisis which practically affected the Greek Economy from 2009 onwards, it appears to be more evident in most CCI's only in 2010. According to Avdikos (2014) the Gross Added Value (GVA) in 8 basic cultural and creative sectors reached its highest point in 2009 (aprox. 5.9 billion €) while in 2010 and 2011 decreased in 5.3 and 4.6 billion € respectively, a total decrease of about 27% (2009-2011). During the same time period the Greek GDP decreased by 10%. This practically suggests that although the impact of the crisis was visible in the CCI's one year later, this impact was harsher than that on the whole Greek economy.

The GVA decrease and, in consequence, the decrease in sales can be mainly attributed to two facts. First, creative and cultural industries are essentially populated by small and very small firms, which are extremely vulnerable to demand fluctuations; can easily exhibit cash flow problems and have a less reliable

access to bank financing. Second, many creative firms usually constitute the most innovative part of complex value chains, (for instance, connection of advertising-music and tv/radio), which practically means that they sell products or services as intermediate products to other sectors which may or may not belong to the CCIs. As a result when the latter are facing a demand decline of their products, they begin decreasing, sometimes much more intensely, their own inflows (e.g. advertising). (Avdikos, 2014).

Concerning the public expenditures, since 2009 public expenditure in culture has not grown but, indeed, the budget cuts have not affected culture more than they have affected other sectors. The rate of cultural expenditure on total expenditure was 1,93% in 2013 (1,13% in 2003).

The following graph shows the trend of Public Expenditures in CCs and the amount of these expenditures on the total of the Greek public expenditures.



One element to put in evidence is the spatial concentration and disparities of this sector in Greece. In most OECD countries, the production of cultural goods tends to be concentrated in large urban areas where population density is a decisive factor (Power, 2002). In addition, productive diversity and cultural events can also be considered as important facilitators of this phenomenon (Lazzeretti et al., 2012). The Attica region, where Athens the capital of Greece is located, has an important position in the economy and geography of the Greek CCIs, as 85% of the cultural and creative goods are produced in Attica, while 58% of the businesses are located in the region and 59% of the professionals employed in the CCIs lives there (Avdikos, 2014). It is therefore clear, that the CCIs are concentrated in the capital, signifying the great geographical disparities of the sector in Greece.

More specifically, according to a recent study by Avdikos (2014), in the Attika region there are approximately 30,000 businesses active in the CCIs (see Table 3). These businesses generate a value of 8.5 billion €, which corresponds to 3.3% of the Attika region GDP for 2006. The Central Macedonia region follows the Attika

region, with 8,000 creative and cultural businesses, that have 655 million € annual turnover (0.8% of the regional GDP). The Thessaly region is the third region with 2.237 businesses and 138 million euro annual turnover (0,7% of the regional GDP) and lastly the North Aegean region involves 591 businesses and annual turnover 31 million € (0.6% of the regional GDP). Therefore, businesses active in the CCI in Greece are over concentrated in the Attica region and are scarcely present in other regions.

It's only natural for a business active in the cultural sector (theatrical and film productions, concerts, radio and television productions, book and newspaper publishes etc.) or in other creative sectors (radio, television, specialized design, software etc.) to choose to be located in the Attica region, since (a) half of the Greek population is located there generating a huge local demand and (b) goods produced in Athens can be consumed all over the country (national products, e.g. a television show, a nationwide newspaper etc.). This is why a large share of the annual turnover of the CCIs is attributed to businesses specializing in television and radio productions, film productions, advertising and publishing activities which are established in Athens.

Furthermore, (c) there is a huge quality gap regarding the intermediate goods produced in Athens and the rest of the country's regions (raw materials, design and promoting services etc.), while the transportation costs are minimal, (d) a huge number of specialized workforce is located in the capital, while there is also a huge number of students at the local Universities and Technological Educational Institutes, so (e) businesses active in the CCIs «win» from an environment where new knowledge and ideas are continuously diffused (knowledge spillovers). In addition to the above mentioned reasons, many similar companies from the CCIs tend to concentrate in specific Athenian districts, due to specific historical conditions (path-dependency), reaping the benefits of the economies of localization. This geographical concentration gives them the opportunity to trade products and services and exchange information at lower costs, choosing the most specialized professionals, utilizing common infrastructure and minimizing market «uncertainties» through internal and interdisciplinary cooperations (Avdikos, 2014).

The concentration of the CCIs in the Attica region appears to be more intensive compared to other European urban areas. For example, in Sweden, 34% of the CCIs are located in Stockholm, in Norway 41% is located in Oslo, in the UK 24% is located in London (Avdikos, 2014). The strong geographical disparities regarding the production of cultural and creative goods in Greece can be attributed to the fact that the majority of manufacturing and services firms across sectors had always been clustered in the Attica region, resulting in further urbanization and desolation of rural areas. On the other hand, policies supporting the CCIs development in the periphery of Greece were rarely linked to other policies for regional and local development.

Finally, concerning the *Imports and exports of creative and cultural goods*, all the categories of products and services grew rapidly between 2002 and 2011. The more extrovert activities were design (mainly fashion and

furniture design), publication of books, video games, advertising and market research. Exports in the design sector accounted for 76.8% of the total exported cultural and creative products while the import share (as part of total imports) of this activity is the highest (66.8%). The less extrovert activities were those of audiovisual media and visual arts (Table below).

Imports and Exports of cultural and creative products and services per sector

Cultural and Creative products:				
Share per category 2002 and 2011				
	Imports (%)		Exports (%)	
	2002	2011	2002	2011
<i>Every category</i>	100	100	100	100
Works of art	13.32	8.42	9.68	6.30
Audiovisual media	0.14	0.11	0.12	0.05
Design	65.31	66.83	70.98	76.79
New audio recording media and electronic games	5.09	7.40	6.36	5.51
Publishing	12.65	13.09	9.07	9.62
Visual arts	2.81	4.14	2.11	1.70
Cultural and Creative services:				
Share per category 2002 and 2011				
	Imports (%)		Exports (%)	
	2002	2011	2002	2011
<i>Every category</i>	100	100	100	100
Advertising, market research and polls	17.79	19.81	21.04	31.26
Audiovisual production services and related services	16.98	19.65	18.91	21.92
Personal, cultural and recreation services	49.06	39.15	45.86	28.02
Research and Development	16.17	21.38	14.18	18.81

Source: Lazaretou, 2014

Furthermore the share of Greece in the total value of world trade in cultural and creative products, as well as in the EU-27 trade, is small with no apparent signs of further penetration. In 2011, the Greek imports accounted for 0.86% of total imports while Greek exports represented only 0.4% of the total EU-27 exports (without weighting as to size of the country). Weighted as to country's population export value per capita is four times less than the per capita value of EU-27 exports.

In **Italy** the cultural production system almost amounted to 460,000 enterprises in 2012 – equivalent to the 7.5% of national economic activities as a whole, that means 3,2% of the total GDP. On the rise by 3.3% compared to 2011, roughly three percentage points higher than the rest of Italian Industry.

To these businesses we owe an added value of 75.5 billion euro (5.4% of the total, which becomes 80.8 billion, 5.8%, if we include the public administration and non-profit organisations). These enterprises employ nearly 1.5 million individuals: +0.5% in one year, compared to a 0.3% increase in unemployment in the general economy.

443.653 = 7,6% of the Italian enterprise

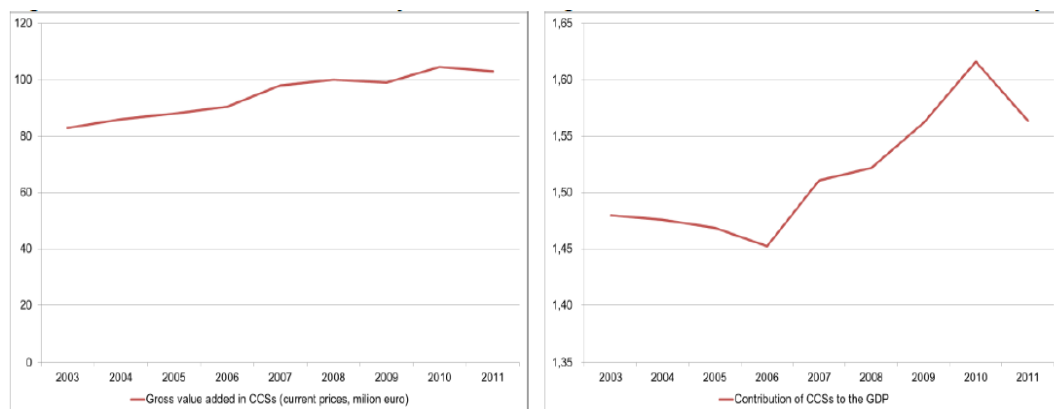


76 billion euro = 5,4% of national added value

Despite the crisis the CCSs in Italy are increasing and in general terms the sector has grown more than the general economy.

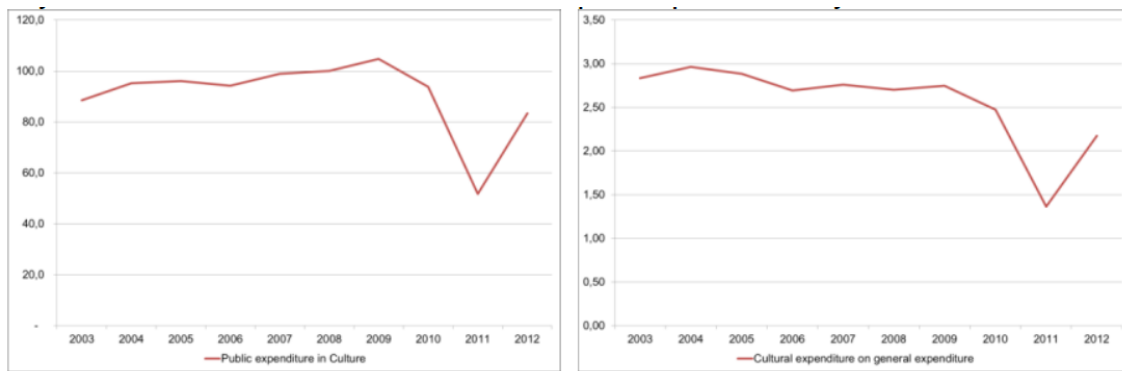
The following two graphs show the trend of GDP in CCs and the contribution of CCs in the total GDP.

Source Eurostat



The above-mentioned process is not public driven. The following charts show the figures for public expenditure in culture and the trend in the public budget: the figures for CCSs stop growing in 2009.

Source Eurostat



Observing the history of the Italian economy, the competitive capacity of the country relies properly on the strict link between culture, creativity, tradition and innovation (Unioncamere 2014).

The changes taking place in the socio-economic context are based on the crucial role of people to develop new concepts and create new solutions. While creativity is meant as a *process*, an extraordinary tool to produce new ideas, culture is a fundamental segment of the Italian history, the source of tangible and intangible treasure that can renew and revitalize the country.

The more *culture* is consumed, the more it grows and the more the Italians nurture their identity and mastery. Culture and creativity are the two assets to bet on nowadays, thanks to their faculty to boots the Italian production system, opening up important areas of employment, especially for young people.

The following table puts in evidence the number of the Cultural and creative enterprises:

Per sub-sector:

	sector	N°
67,9%	CREATIVE INDUSTRIES	301.451 (tot)
	Architecture	140.743
	Communication and branding	33.550
	Design and styling	27.894
	Craft	99.265
25,8%	CULTURAL INDUSTRIES	114.295 (tot)
	Film, video, radio – tv	13.684
	Videogames and softwares	44.428
	Music	2.348
	Editing and printing	53.835
0,2%	HISTORICAL AND ARTISTIC HERITAGE (museums, libraries, archives and historical places and monuments management)	1.037 (tot)
6,1%	PERFORMING AND VISUAL ARTS	26.870 (tot)

Per Region:

Regioni	Imprese registrate		
	v.a.	% su Italia	% su tot. economia
Piemonte	33.148	7,2	7,2
Valle 'Aosta/Vallée d'Aoste	1.070	0,2	7,7
Lombardia	88.023	19,2	9,2
Trentino-Alto Adige/Südtirol	7.511	1,6	6,9
Veneto	39.877	8,7	8,0
Friuli-Venezia Giulia	8.970	2,0	8,3
Liguria	12.063	2,6	7,2
Emilia-Romagna	33.308	7,3	7,0
Toscana	35.236	7,7	8,5
Umbria	6.848	1,5	7,1
Marche	13.186	2,9	7,5
Lazio	53.561	11,7	8,7
Abruzzo	10.501	2,3	7,0
Molise	2.183	0,5	6,2
Campania	34.060	7,4	6,1
Puglia	23.477	5,1	6,1
Basilicata	3.889	0,8	6,4
Calabria	11.522	2,5	6,4
Sicilia	28.896	6,3	6,2
Sardegna	10.913	2,4	6,5
NORD-OVEST	134.304	29,3	8,4
NORD-EST	89.666	19,6	7,5
CENTRO	108.831	23,7	8,3
SUD E ISOLE	125.441	27,4	6,3
ITALIA	458.243	100,0	7,5

The system's exports have grown threefold in twenty years, and were worth 39 billion euro in 2013. And the commercial balance is active too, with a surplus of 22.7 billion, an absolute record since the introduction of the euro. It is also not surprising that the territories having a strong manufacturing vocation are among those that are giving the biggest contribution to this success. But all this is not "only" an important countercyclical resource.

It's important also to underline the production system's "multiplying ability": to measure its driving force on other areas of the economy. The results are stunning. Culture can boast, using a technical expression, a multiplier of 1.7: for every euro of added value it activates 1.7 euro.

The 80.8 billion euro the cultural system as a whole produced in 2013, hence activating a further 133 billion, the direct and 'induced' together in total 214.2 billion Euros – 15.3% of the national economy. As we can see, this is a strategic sector with a considerable margin of growth.

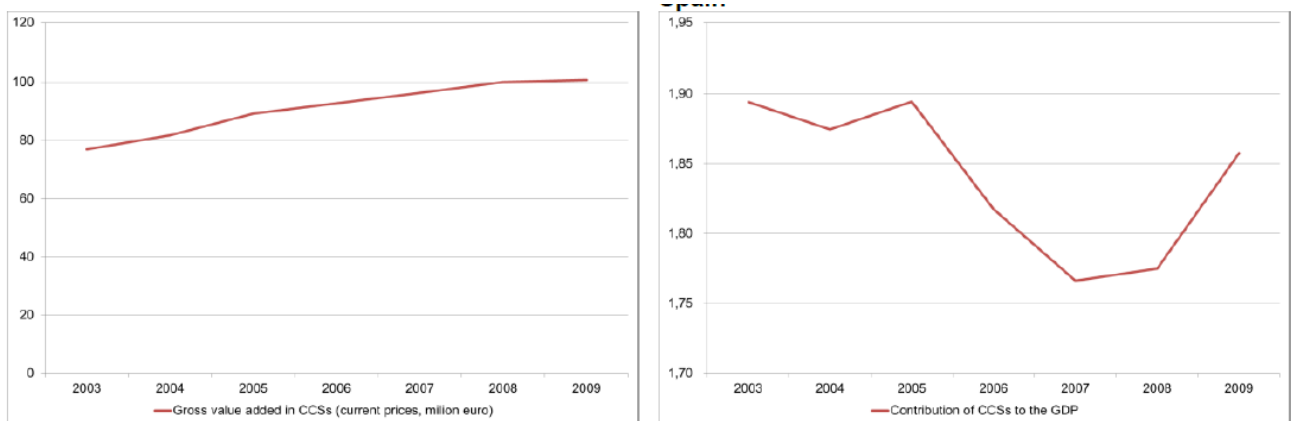
In relation to the spatial concentration, the urbanization trend of creativity is confirmed, even if in Italy we can see a more dispersed existence of creative clusters over the territory. As to variety, the

big metropolitan areas have generally undergone a process of diversification, but the dominant pattern is still that of specialization in the traditional creative industries. And even if the creative industries show an ‘urban’ nature as they tend to cluster in the largest urban agglomerations (mainly Rome and Milan but also cities of art or culture like Florence), anyway they play an important role also for the decentralized local economies, giving shape to small clusters.

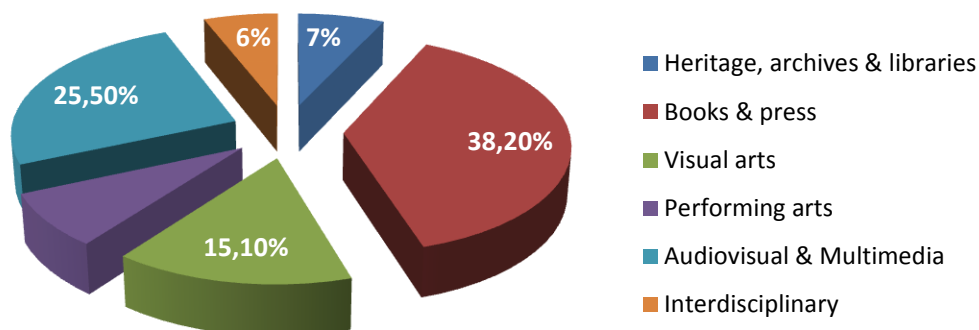
In **Spain**, according to the Cultural Statistics Yearbook 2014, published by the Ministry of Education, Culture and Sport (which includes data from the Satellite Account for Culture in Spain 2008-2012), the cultural industries sector represented almost 2.5% of GDP in 2012 (and 3.4% if one takes into account all activities related to intellectual property), and generates spill-over effects in many other sectors of the Spanish economy, particularly in the field of information technologies, communication, innovation and tourism. The latest data shows that the Gross Value Added (GVA) of the Spanish culture industries in 2012 was 25 263 million EUR (and 33 594 million EUR if one takes into account all activities related to intellectual property). The most important are the publishing sector (9 640 million EUR) and audiovisual and multimedia (6 139 million EUR). The number of companies, whose main economic activity was defined as cultural, reached 108 556 in 2013, approximately 3.4% of all those recorded in the *Central Companies Directory*, published by the National Statistics Institute. In comparison to the previous year, more than 2 000 companies have closed down, which nearly represents 2% of the total. As regards the number of employees, 99% of cultural enterprises had between 0 and 9 employees in 2013, while only 0.1% had more than 100. Data from the *Labour Force Survey* published by the *National Statistics Institute* show that the number of employed people in the cultural field in 2013 was approximately 485 300, around 2.8% of total employment.

The following charts show the growth of GDP between 2003 and 2009, putting in evidence that in some period the contribution to the national product fluctuated significantly.

Source Eurostat



The contribution of the cultural activities (average for 2008 – 2012) to GDP broken down by sectors is shown below (graph and tables)



CONTRIBUTION OF CULTURAL ACTIVITIES AND COPYRIGHT-BASED ACTIVITIES TO GDP

	2008		2009		2010		2011		2012	
	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP
Cultural activities	30,524	2.8	29,285	2.8	29,446	2.8	28,224	2.7	26,031	2.5
Copyright-based activities	38,748	3.6	37,355	3.6	37,549	3.6	36,813	3.5	35,099	3.4

Satellite account for culture in Spain. Results for 2008-2012, Ministry of Education, Culture & Sport

CONTRIBUTION OF CULTURAL ACTIVITIES TO GDP BROKEN DOWN BY SECTORS

	2008	2009	2010	2011	2012
ABSOLUTE VALUES (Millions of euros)	30,524	29,285	29,446	28,224	26,031
Heritage, archives & libraries	2,010	2,075	2,013	1,954	1,912
Books & press	11,378	10,818	11,359	11,090	10,167
Visual arts	5,008	4,615	4,184	4,185	3,750
Performing arts	2,334	2,420	2,411	2,293	2,172
Audiovisual & multimedia	8,069	7,667	7,716	6,953	6,310
Interdisciplinary	1,725	1,690	1,764	1,749	1,721

% OF TOTAL GDP	2.8	2.8	2.8	2.7	2.5
Heritage, archives & libraries	0.18	0.20	0.19	0.19	0.19
Books & press	1.05	1.03	1.09	1.06	0.99
Visual arts	0.46	0.44	0.40	0.40	0.36
Performing arts	0.21	0.23	0.23	0.22	0.21
Audiovisual & multimedia	0.74	0.73	0.74	0.66	0.61
Interdisciplinary	0.16	0.16	0.17	0.17	0.17
% OF CULTURAL GDP	100	100	100	100	100
Heritage, archives & libraries	6.6	7.1	6.8	6.9	7.3
Books & press	37.3	36.9	38.6	39.3	39.1
Visual arts	16.4	15.8	14.2	14.8	14.4
Performing arts	7.6	8.3	8.2	8.1	8.3
Audiovisual & multimedia	26.4	26.2	26.2	24.6	24.2
Interdisciplinary	5.7	5.8	6.0	6.2	6.6

Satellite account for culture in Spain. Results for 2008-2012, Ministry of Education, Culture & Sport

CONTRIBUTION OF CULTURAL ACTIVITIES AND COPYRIGHT-BASED ACTIVITIES TO GROSS VALUE ADDED (GVA)

	2008		2009		2010		2011		2012	
	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP	ABSOLUTE VALUES (Millions of euros)	% OF TOTAL GDP
Cultural activities	29,468	3.0	28,442	2.9	28,487	3.0	27,433	2.9	25,263	2.7
Copyright-based activities	37,025	3.7	35,868	3.7	35,898	3.8	35,350	3.7	33,594	3.6

Satellite account for culture in Spain. Results for 2008-2012, Ministry of Education, Culture & Sport

CONTRIBUTION OF CULTURAL ACTIVITIES TO GVA BROKEN DOWN BY SECTORS

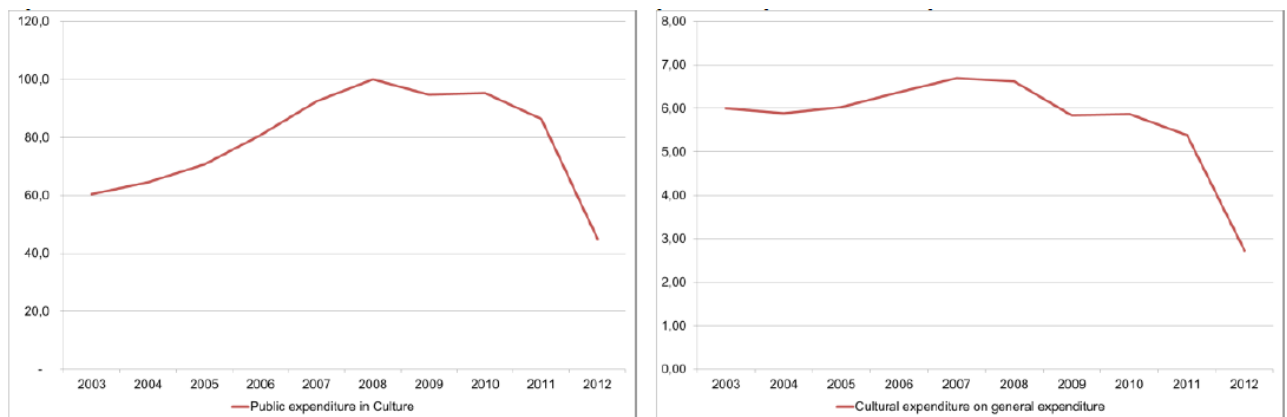
	2008	2009	2010	2011	2012
ABSOLUTE VALUES (Millions of euros)	29,468	28,442	28,487	27,433	25,263
Heritage, archives & libraries	2,037	2,095	2,077	2,016	1,973
Books & press	10,845	10,378	10,790	10,560	9,640
Visual arts	4,838	4,433	4,030	4,050	3,634
Performing arts	2,340	2,427	2,398	2,280	2,159
Audiovisual & multimedia	7,670	7,411	7,430	6,780	6,139
Interdisciplinary	1,738	1,698	1,760	1,746	1,718

% OF TOTAL GVA	3.0	2.9	3.0	2.9	2.7
Heritage, archives & libraries	0.20	0.22	0.22	0.21	0.21
Books & press	1.09	1.07	1.13	1.10	1.02
Visual arts	0.49	0.46	0.42	0.42	0.38
Performing arts	0.23	0.25	0.25	0.24	0.23
Audiovisual & multimedia	0.77	0.76	0.78	0.71	0.65
Interdisciplinary	0.17	0.17	0.18	0.18	0.18
% OF CULTURAL GVA	100	100	100	100	100
Heritage, archives & libraries	6.9	7.4	7.3	7.3	7.8
Books & press	36.8	36.5	37.9	38.5	38.2
Visual arts	16.4	15.6	14.1	14.8	14.4
Performing arts	7.9	8.5	8.4	8.3	8.5
Audiovisual & multimedia	26.0	26.1	26.1	24.7	24.3
Interdisciplinary	5.9	6.0	6.2	6.4	6.8

Satellite account for culture in Spain. Results for 2008-2012, Ministry of Education, Culture & Sport

Regarding public expenditure, a dramatic cut was registered in the budget dedicated to culture after 2009 (-55,1% from 2008). This is one of the sectors that suffered one of the strongest budget resizing: from 6,63% of the total budget in 2008, to 2,73% in 2013.

Source Eurostat



From a global perspective, there are four main challenges to be overcome by the culture industries in Spain:

- find a balance between the financial viability of the culture industries while, at the same time, adhering to rules preventing economic or cultural monopolies, particularly in the field of multimedia;
- reaffirm the independence of the culture industries, such as book publishing, film and the audiovisual arts in general;

- revise the approach to subsidising the culture industries (e.g. through grants, cheap loans, tax relief) to focus more on the creative side of the operation and improve access to credit markets for small and medium firms; and
- persuade people to recognise that culture industries are a source of future economic growth as well as a mean of access to culture. Two possibilities for achieving this objective would be to foster "multimedia clusters" and to establish the application of new technologies to culture as one of the poles of regional development.

The government's commitment to promote the culture industries resulted in the creation of a new Directorate-General for Cultural Industries and Policy and the implementation, in December 2008, of a *Plan for the Promotion of Cultural Industries*. For the year 2014, the lines of action of the Plan can be summarized as: promotion of creators and cultural industries, and growth, consolidation and internalization of cultural firms.

In the particular context of small and medium enterprises (SME), the government, through the different plans for the promotion of cultural industries, has recognized the key role of SMEs as the core of the Spanish cultural and creative industry, and has addressed one of the main problems faced by these companies: the financing of cultural and creative projects. To do this, the government has implemented a system of capital grants, and access to credit together with the *Sociedad de Garantía Reciproca Audiovisual* [*Mutual Guarantee Society*], to promote the modernization, innovation and technological adaptation of cultural companies and to increase the legal supply of cultural content on the Internet.

4.4 Employment in CCS

As already stated, cultural and creative sectors comprise a large number of significantly heterogeneous sub-sectors and industries which also appear to exhibit diverse features in terms of organization, market structure, economic magnitude and government support across countries or even across regions of a country (HKU, 2010; Henry, 2007). In this regard, one should also expect great variation in the characteristics and challenges of entrepreneurs being engaged in different industries of different countries and regions. These discrepancies in the entrepreneurial environment along with the definition difficulties mentioned above constitute crucial reasons for the limited availability of empirical evidence being applicable over the whole cultural and creative sector.

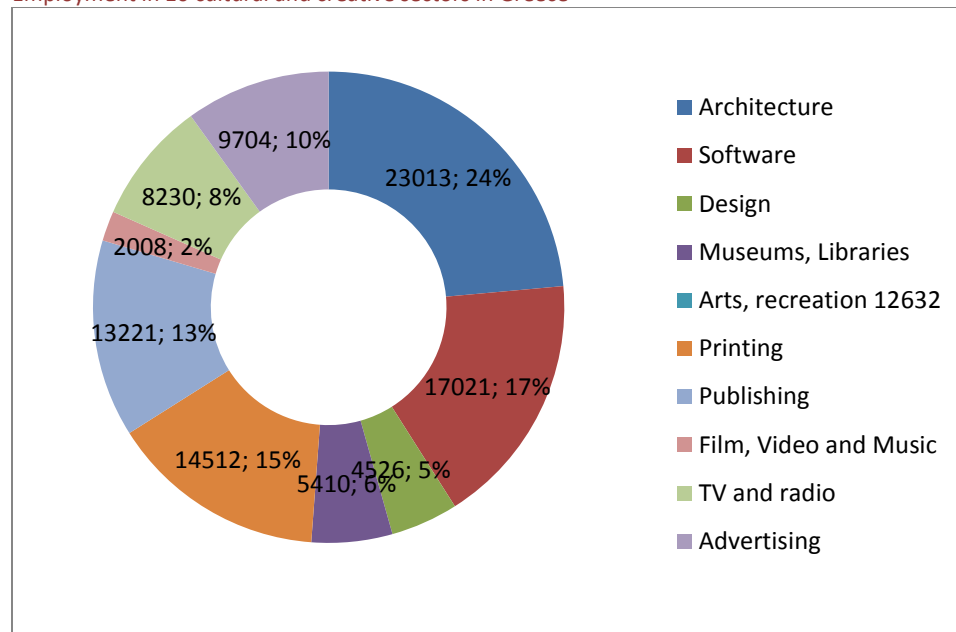
As concerns the forms of employment in CCIs, the literature suggests that cultural and creative entrepreneurs are far more likely to be engaged in *non-conventional* employment based on part-time work, temporary contracts and freelancing, than the workforce in general. In this vein, Ellmeier (2003) emphasize on the *atypical* forms of employment and the *precarious* working conditions in cultural and creative sector involving flexibility, mobility, project work, voluntary or very low-paid activities.

Taking into consideration the abovementioned special characteristics of employment in CCI's it can be easily understood that it is very difficult to accurately estimate employment in the CCI's using the available data sources.

In **Greece**, for instance, the NACE classification used by the Hellenic Statistical Authority and then by Eurostat does not include a detailed 4-digit code analysis, other than this, a considerable number of people working in the CCI's either does not “officially declare” as its primary employment sector one of these industries (although he/she is actually employed in them) or works without insurance and healthcare provision. For example, a research on the professional situation of authors in Greece has indicated that 15% of them recognize book writing as their main income source, while 66% of them acknowledge that their health insurance is related to employment which is irrelevant to their writing activity (Avdikos, 2014). Another limitation of official statistical data is that they do not take into account voluntary (i.e. unpaid) or temporary employment (e.g. internships).

Therefore, the estimations about the employment in CCI's can differ according to the available statistical data and their sources as well as on the selection process of the specific industries. A recent study based on Eurostat data estimated employment in 10 CCI's in Greece, (namely, architecture, publishing, printing, software, film, video and music, advertising, arts and recreation, museums and libraries, design, tv and radio) for the first trimester of 2013 (Avdikos, 2014). The total number of employees in these sectors reaches 110,000 people and accounts for 3% of total employment in Greece. A share of 24% or 23,103 people are employed in architectural agencies while only 2,008 people or a share of 2% are employed in film, video and music industry.

Employment in 10 cultural and creative sectors in Greece

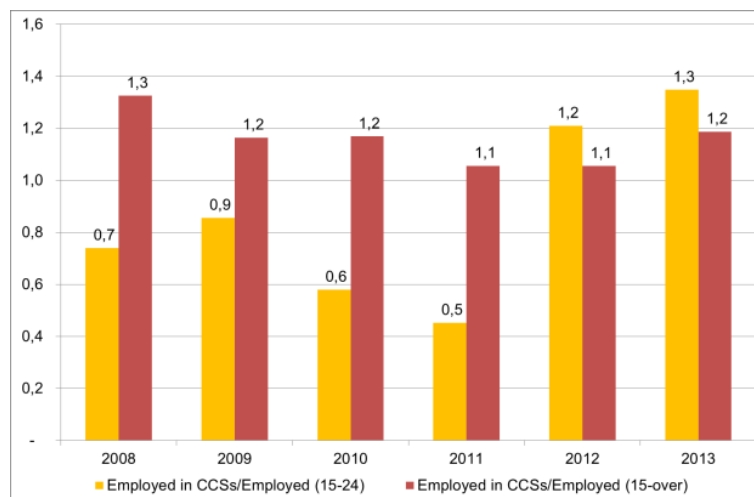


Source: Avdikos, 2014

In another study², which is not based on the NACE classification, but mainly on information gathered from professional organizations/registries, it is stated that the employment in the cultural sector alone is estimated at more than 100,000 people for 2012. More specifically, it shows that professionals in the area of television, film industry and live events are 20,850, in arts 5,755, those working in museums, archeological sites and libraries are 19,429, in music and ballet schools there are 9,408 employees, while impressive is the number of those that exercise literary professions which reach 55,000.

In addition, Eurostat, based on the ISCO classification, reports that in 2009 the number of writers and artists in performing arts all over Greece were approximately 22,900. Finally, the Priority Sector Report on the CCIs of the European Cluster Observatory (Power, 2011) estimates the location quotient index of CCIs in Greece at 1.12 ranking Greece in the 17th position among 30 European countries which practically means that there a tendency of overconcentration of the creative and cultural activities in Greece.

Source Eurostat



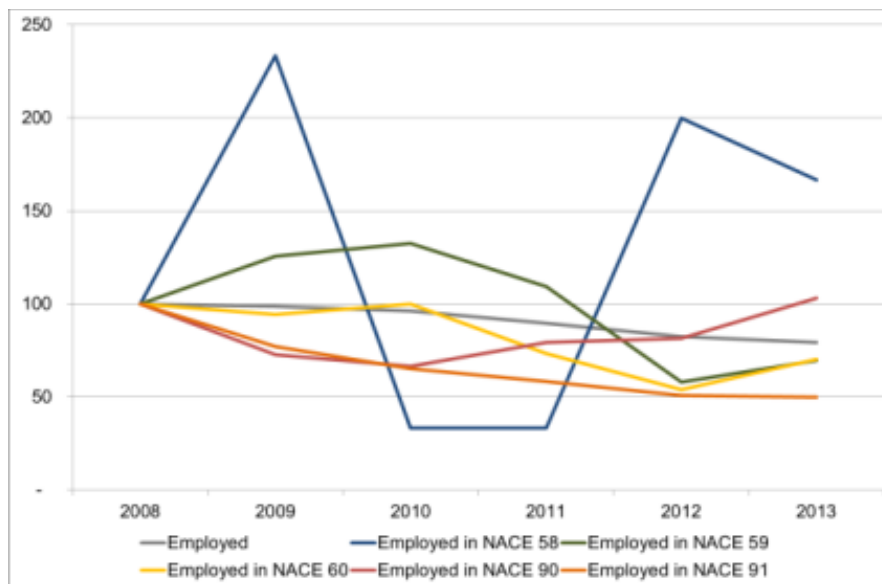
According to Avdikos (2014) in Greece the employment in the 10 CCIs presented in the previous section decreased between 2008 and 2013 from 156,000 to 110,000 employees (i.e. a decrease of 30%) while in the EU-27 the total number of people employed in these sectors remained invariant. It appears that in terms of employment the economic crisis had a significant impact on CCIs since 2009 as five out of ten industries decreased their number of employees drastically and much more intensively than EU-27. The individual industries exhibiting the greater decrease in terms of employment were those of printing (- 67%, 2008-2013), and museums-libraries (-54%, 2008-2013) when in EU-27 the relevant decrease was 22.5% for the former and only 2.4% for the latter industry during the same period. Significant decline in employment was also identified in the filming and music industries, which despite the fact that they exhibited an increase

² Katerina Lymperopoulou, The Civilization of the Crisis, Journal "To Vima", 3/3/2013, accessible at <http://www.tovima.gr/culture/article/?aid=500708> (in Greek)

between 2008 and 2010 they displayed a great decrease in the next period. Contrary to the abovementioned sectors, design and software industries showed a considerable increase in employment, 62.2% and 26.9% respectively. These two industries were also the only ones which showed an increase in employment in EU-27 as well (33.5% and 15.5 respectively).

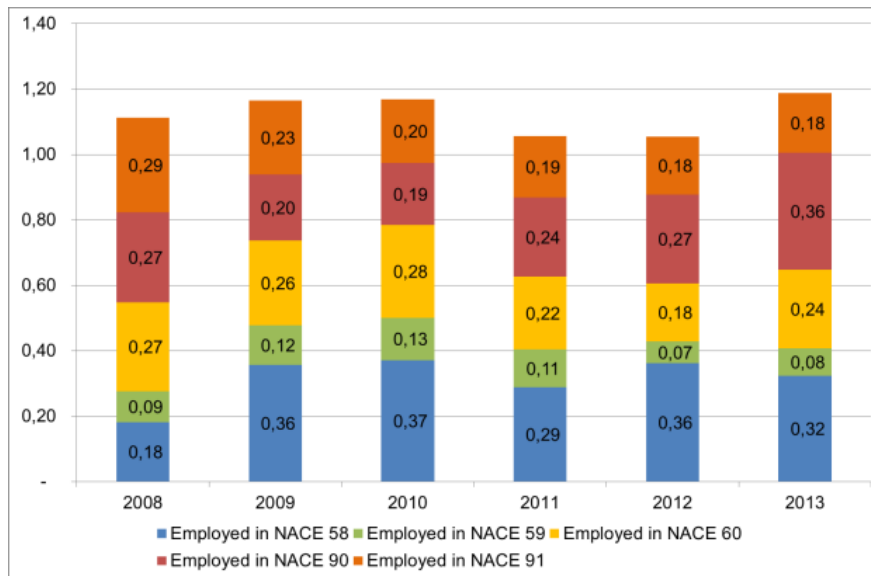
The analysis of the data provided by Eurostat clearly shows that, for the CCS, the most relevant sector is the “Creative arts and entertainment” sector (NACE 90) which accounts for 30,1% of the total employed in the CCS followed by the “Publishing activities” sector (NACE 58) which accounts for 27,3%. These two sectors seem to be the most dynamic and register a higher performance than the general trend, driving the overall positive trend visible for the CCS

Trend in Employment in CCSs for sector of activity in Greece



SourceEurostat

Composition of employed in CCSs in Greece



Source Eurostat

Concerning the regional distribution of the CCI. Although statistics on the evolution of the Greek CCI sector are almost non-existent, according to a recent study (Power 2011) the Attica region is considered as one of the top 25 regions in terms of employment performance in Europe for 2007 (out of 266 regions in 30 countries). At a national level, Greece had the 18th position among 30 European countries as employment in CCIs accounted for 4.1% the total employment. It is worth mentioning that richer and stronger economies such as Italy and France are ahead of Greece by one or two positions while Germany and Spain follow in ranking.

In Athens, creative professionals³ reach 71,300 people in the third trimester of 2010. In this context, it can be estimated that CCIs employed around 80,000 people in 2010, a number which corresponds to a 2% share of the employees of the capital, while two years ago this number reached approximately 100,000 people (Avdikos, 2014).

Employment in the CCIs in Athens in 2010 declined by 19% compared to 2008, while the corresponding decline in the rest of Greece was 9%. The economic crisis deprived Athens of approximately 17,000 jobs in its first two years (2009-2010), while it appears that the crisis's impact on the CCIs was much greater in Athens than the rest of Greece. For example, the number of employees in the arts was reduced by 48% in two years, while in the rest of Greece it was reduced by 13%. The printing and publishing, advertising and architectural sectors saw relevant reductions. In 2010, the majority of creative workforce was employed in publishing and printing (29,536), followed by architects (13,491), employees in advertising (9,471) and in production of radio and television programs (7,619) (Avdikos, 2014).

³ These creative professionals are employed in the following sectors: printing and publishing, film, video and music, television and radio, architecture, advertising, arts, museums and libraries.

At this point, it is important to mention the gradual increase of self-employment and small “creative groups” during the first two years of the crisis. From 2010 onwards many semi-professional theatrical groups, new galleries, small collectives active in specialized design and many new film ventures appeared. The frequency of these ventures’ appearance has been by far greater than the period before the economic crisis and can be attributed to the fact that those becoming self-employed have been let go from their previous jobs and their only professional outlet is the initiation of a collective or personal venture (Avdikos, 2014).

Finally, creative professionals appear to share some common characteristics: (a) most of them are young (less than 40 years old); (b) in many cases they appear to work without social security, they not to declare their income from creative employment in order to avoid indirect taxation (VAT) as they cannot afford the cost; (c) the most important funding source for their ventures are friends and relatives; (d) they are well-educated (Avdikos, 2014; LIEE/NTUA, 2015).

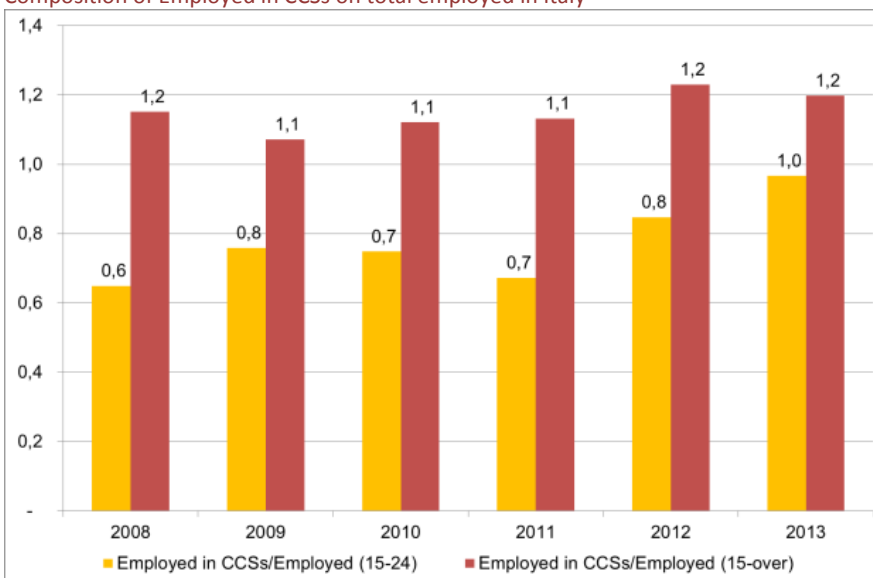
Turnover and number of businesses in the CCIs in Greece per region

Region	Printing		Publishing		Film, video		Television, Radio		Architecture		Advertising		Arts, Entertainment		Museums, Libraries		Total (1)		Total (2)	
	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	%	1	%
Eastern Macedonia – Thrace	108	33,7	85	16,9	47	2,5	92	5,2	182	45,4	108	4,0	144	3,6	16	0,1	782	1,5%	111	1,1%
Central Macedonia	630	116,5	384	137,9	225	17,0	181	36,4	4.538	174,0	828	114,2	1052	51,4	145	7,4	7983	15,1%	655	6,6%
West Macedonia	41	2,9	41	2,8	17	0,8	44	2,1	525	29,3	42	9,3	102	1,7	22	0,3	834	1,6%	49	0,5%
Thessaly	139	31,1	76	24,2	56	1,6	77	7,2	1.412	55,0	173	10,0	260	7,7	44	1,2	2237	4,2%	138	1,4%
Epirus	61	4,7	66	5,6	18	0,5	36	1,2	695	35,4	72	4,2	120	1,9	97	1,4	1165	2,2%	55	0,6%
Ionian Islands	41	2,3	37	2,2	23	0,9	36	1,1	362	17,2	72	1,3	143	4,5	37	0,4	751	1,4%	30	0,3%
Attica	1995	913,1	2414	2301	1657	756	288	1305	13921	717	3518	1996,8	6462	265,8	405	213	30660	57,8%	8468	84,9%
Western Greece	110	11	127	27,8	44	2,5	77	7,2	1.123	47,6	150	12,8	215	4,8	42	0,8	1888	3,6%	115	1,1%
Central Greece	85	4,7	70	5,6	36	1,2	59	4,0	842	44,3	112	8,5	138	2,5	30	0,2	1372	2,6%	71	0,7%
Peloponnese	89	10,3	98	6,9	55	2,4	95	4,6	877	42,7	109	3,8	251	2,9	23	0,2	1597	3,0%	74	0,7%
North Aegean	35	3,4	43	3,5	25	0,7	44	2,3	274	16,5	35	1,6	119	2,5	16	0,3	591	1,1%	31	0,3%
South Aegean	57	9,5	56	4,5	33	2,3	65	3,1	514	24,3	82	3,6	217	6,2	33	0,4	1057	2,0%	54	0,5%
Crete	111	22,2	99	17,8	64	7,6	90	7,5	1.187	52,3	211	11,9	332	5,2	26	1,3	2120	4,0%	126	1,3%
Total	3502	1165,4	3596	2.556,7	2300	796	1184	1387	27183	1301	5512	2186	9555	361	936	227	53037	100,0%	9976	100,0%
% Attica	57,0%	78,4%	67,1%	90,0%	72,0%	95,0%	24,3%	94,1%	51,2%	55,1%	63,8%	91,3%	67,6%	73,7%	43,3%	93,8%	57,8%		84,9%	

Source: Avdikos (2014)

In **Italy** the CCSs employ around 1.3 million people and represent 1,2% of the employed. The trend shows that professionals who work in the CCSs have a better performance rate than the rest, and this among both adults and young people.

Composition of Employed in CCSs on total employed in Italy



Source Eurostat

The following table shows the added value and jobs by sector in the whole value chain in Italy

		Value Added (m €)	Jobs (in thousands)	% VA of GDP	% Jobs in sector out of total jobs
Material Culture	Fashion	38,024.2	1,112.6	3.04%	4.59%
	Industrial Design and Crafts	19,659.7	520.7	1.57%	2.15%
	Food & Wine Industry	5,054.8	125.1	0.40%	0.52%
Industry of Content, Information and Communications	Computer & Software	14,641.4	282.7	1.17%	1.17%
	Publishing	10,781.8	224.9	0.86%	0.93%
	TV & Radio	4,070.8	89.4	0.33%	0.37%
	Advertising	2,405.8	64.9	0.19%	0.27%
Historic and Artistic Heritage	Film	1,929.8	37.6	0.15%	0.16%
	Cultural Heritage	7,811.0	105.4	0.63%	0.44%
	Architecture	6,683.5	172.3	0.54%	0.71%
	Performing Arts	5,186.2	120.2	0.42%	0.50%
	Contemporary Art *	357.2	15.0	0.03%	0.06%
TOTAL		116,606.2	2,870.9	9.34%	11.85%

Source Istituto Tagliacarne

The trend in the last year is even more positive: in 2014 almost 90 thousand of cultural and creative professional figures were recruited, representing the 15% of the overall new employments. This data is taken from the Excelsior Information System, the survey conducted by Unioncamere and the Ministry of Labour (2014) on vocational and training needs. These requirements are monitored through an annual survey on a sample of about 100 000 industry and service enterprises with at least one employee.

The accurate analysis of Unioncamere shows that Italian enterprises are well disposed to welcome cultural and creative figures because these professions combine together innovation and originality, two successful ingredients to overcome over national and international markets.

When the enterprises hire cultural and creative professional figures, they ask for university graduates more frequently than for other profiles (23,4 % against the 8,7 %), expecting from these specific professions a higher knowledge content.

A large space is occupied also by high school graduates (the 41% of the labour demand of creative and cultural profiles), for which, however, it is most needed a post-degree qualification.

In addition to higher levels of education and specialization, enterprises ask for a specific experience not only for those who intend to carry out a cultural or creative profession (prerequisite for the two-thirds of the employments) but also for those who will cover other types of professions (more than 50% of the hires).

Likely, for this reason, the enterprises feel less suited to enroll young people just out of the education system than in the case of other professions (36.1% against 47.1% of recruitment). Even though there are several examples of specific professional figures in which young just graduates have a good chance of employment.

The Excelsior Information System investigation shows that newly graduated young people would have even more chance to get a job if they were adequately prepared in line with the needs of the market or if they were following courses more suitable for the labor market. Indeed, in 2014, almost 18 out of 100 cultural and creative professions were considered difficult to find, either for lack of candidates, either because of inadequate preparation both on the training plan as on the required experience and soft skills (team work, flexibility and adaptation, etc.).

Looking at the statistics, the other major trend for the CCIs is the need of market-oriented figures, mirroring the necessity of the enterprises to enhance their sphere of influence and action.

Moving to the artistic area, 1,400 directors, artistic directors, actors, writers, and other will be requested as well as 1,200 graphic designers and set designers.

Among the top positions are also professions specialized in footwear and the one related to the artistic processing of wood. All figure that are symbol of the traditional *Made in Italy*.

Although enterprises tend not to reserve ample space to young people just out from school or university, there are some cases in the CCIs - especially related to the field of ICT and engineering - in which these young people can boast good chance of employment.

The demand for a degree (university degree as well as a diploma in secondary school or a simple professional qualification) is very high and covers 81% of recruitments for 2014, a clear fact that the *Made in Italy* relies on humanistic and scientific knowledge.

Most of the time, beyond a certain degree of formal education, enterprises seem to move towards candidates able to show an attitude of practice that only experience can provide. In fact a more focused and a more operational preparation, that is the result of a specific experience in the profession or in the industry, is required in 2014 to about 66% of cases.

Thus, it is possible to identify a subdivision between high skill and medium/low-skill professions based on the different levels of experience gathered. In the case of high-skill occupations, the aim is to give space to candidates who can boast a more specific experience in the profession: in particular for those figures related to a kind of innate creativity, such as composers, musicians and singers, painters and sculptors, graphics and designers, as well as some types of figures related to engineering (electrical engineers and telecommunications) or training (teachers of arts and literature).

On the side, the medium-low skill occupations tend to select candidates who possess experience in the field, even less specialized: this is especially required for different figures of mold crafted, such as craft-workers specialized in footwear, craft and industrial painters, bakers and artisan pasta makers, painters, plasterers and decorators. It means that enterprises look for medium/low skilled candidates with a certain degree of dexterity and creativity, while aiming mainly at hiring profiles that have not yet carried out the specific tasks required by the profession (Unioncamere 2014).

The first three regions with the highest intensity of demand for cultural and creative professions are all North Central, specifically Marche, Tuscany and Veneto, with a peak of 44 out 100 hires in the province of Fermo (first province in the ranking for intensity of the demand for cultural and creative professions), as well as the e provinces of Pistoia, Vicenza, Arezzo and Pisa (24-26 of 100) and Ascoli Piceno and Treviso (20 out of 100).

Three other regions are in the list. Two are in the south, Campania and Puglia, where the need of creative and cultural profiles is more related to tourism. The other region is in the North – Lombardy - where the creative figures are related to the ICT field.

Employment opportunities offered by the world of cultural and creative professions can risk in part to be disregarded because of an existing mismatch between demand and supply of labor. In some cases enterprises find difficult to find the figures they need, a phenomenon that is particularly marked in the case of cultural and creative professions, stating that in 2014 enterprises report difficulties in finding 18 planned recruitment out of 100 (this ratio drops to about 9 out of 100 for other professional figures) (cfr. Unioncamere 2014).

The motivation concerns mostly:

- The skills gap, connected to an inadequate training or to a lack of the necessary experiences or to a lack of personal abilities necessary for the profession.
- The gap in supply. When the figure is in high demand and there is a scarcity on the market or when there are missing structures that form the specific /new profession
- The mismatch in terms of expectations among the candidates themselves and entrepreneurs. Which occurs when the candidates have higher expectations than what is offered or there are few people interested to practice the profession.

Amongst the most *unavailable* profiles for the enterprises, there are figures related to computer and engineering, as analysts and software engineers, technical programmers, electrical engineers, telecommunications, industrial engineers and management engineers. For these profiles, the difficulties are in large part attributable to reasons related to gap in supply, again highlighting the need for bringing young people into scientific professionalism, through appropriate guidance paths to bring out the employment potential that such professionalism can offer.

Other figures quite difficult to find in 2014 are professions related to the artisan culture of the *made in Italy*, such as carpenters and toolmakers of machines for woodworking, craftsmen and skilled workers in footwear, craft and industrial painters, tailors and cutters craft, and painters, plasterers and decorators.

Motivations are related to the gap of expectations, confirming the need for strengthen guidance and awareness in favor of the younger generation on the real value and know-how of certain professional, that maybe in the common imagination may appear a bit disqualifying.

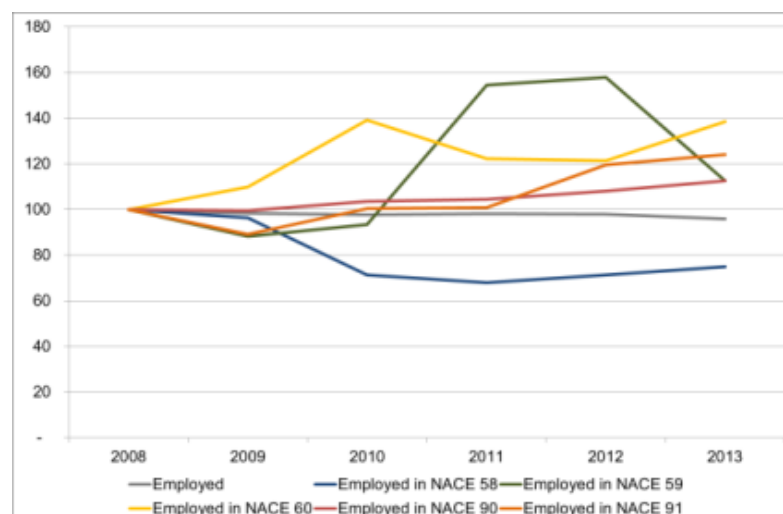
Moreover, among the creative and cultural figures more difficult to find, there are also some related to the world of audio-visual content production, such as composers, musicians and singers, graphics, designers, fitters stage, and the directors, writers etc. In these cases, the skills gaps are the main motivations.

In this regard, it is worth to highlight that for all forms of creative and cultural figures, the skills gap is the motivation that explains almost half, if not more than, the hires associated with recruitment difficulties.

The analysis, taken mostly form the Excelsior Information System, strengthens the need to continue to promote the process of dialogue between the educational system and the productive one, so that the first will succeed in training young people - in terms of skills and technical specifications as well as transversal abilities and experience through paths of school-work, apprenticeships and internships – so that they can satisfy the needs of enterprises, thus having a better chance of employment.

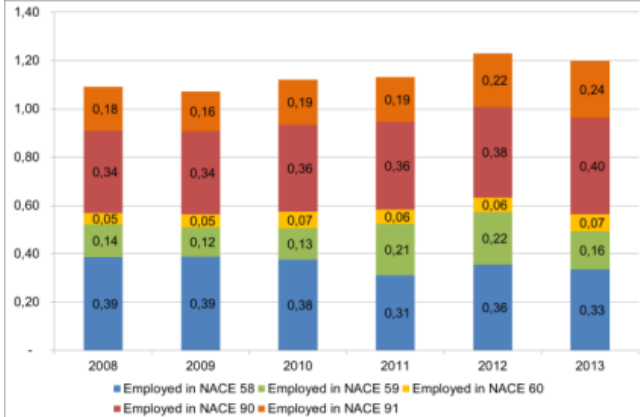
The following charts show the composition of employment in the CCSs and its trend in the last 6 years. All those employed in the CCSs register a better performance than those employed in other sectors, in general. The trend of the employed in the “Creative arts and entertainment” and in “Libraries, archives and museums” (NACE 90 and 91) registers a very good performance.

Trend in Employment in CCSs for sector of activity in Italy



Source Eurostat

Composition of employed in CCSs in Italy



Source Eurostat

In **Spain**, in 2013, the number of jobs in the cultural sector amounted to 485.3 thousand people; 1,7% of the total number of people employed in Spain on average in the annual period.

Important differences can be seen according to sex between the jobs linked to the cultural sector and the total number of jobs, with a higher proportion of males, 60.4%, compared to 54.4% seen in the overall number of jobs, and according to age groups, with a higher proportion of people in work in the central age groups.

AVERAGE ANNUAL EMPLOYMENT IN CULTURAL INDUSTRIES BROKEN DOWN BY ECONOMIC ACTIVITIES

	ABSOLUTE VALUES		DISTRIBUTION BY %	
	(in thousands)			
	2012	2013	2012	2013
TOTAL	478,8	485,3	100	100
Activities associated with libraries, archives, museums & other cultural institutions	34.5	33.7	7.2	6.9
Publishing of books & periodicals and other publishing activities	54.9	53.5	11.5	11
Film & video activities and broadcasting	75.2	68.7	15.7	14.2
Design, creation, translation, art & entertainment activities. Graphic arts, recording, playing of media, music publishing	109.3	110.8	22.8	22.8
Manufacture of audio & video media & equipment, musical instruments				
	86.7	88.5	18.1	18.2
Other economic activities	118.3	130.2	24.7	26.8
Employment in cultural industries as a % of total employment	2.7	2.8		

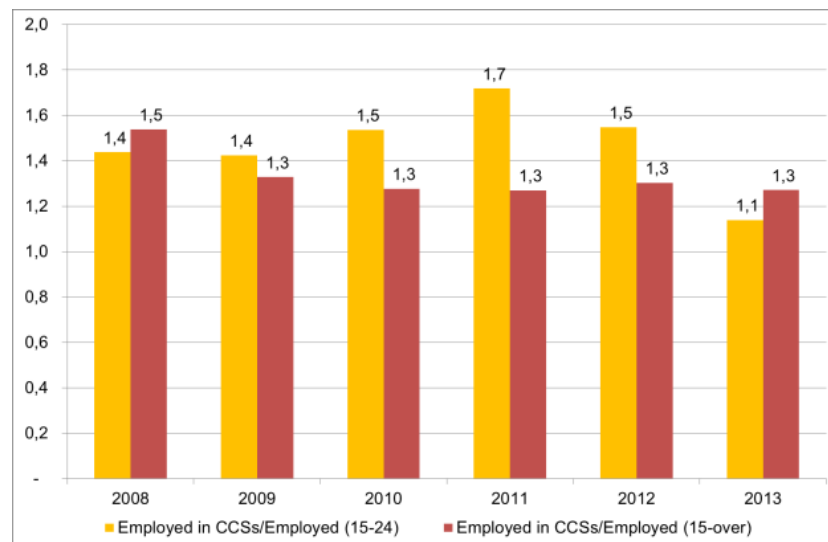
Satellite account for culture in Spain. Results for 2008-2012, Ministry of Education, Culture & Sport

AVERAGE ANNUAL EMPLOYMENT IN THE CULTURAL INDUSTRIES BROKEN DOWN BY OCCUPATIONS

	ABSOLUTE VALUES		DISTRIBUTION BY %	
	(in thousands)			
	2012	2013	2012	2013
TOTAL	478.8	485.3	100	100
Writers, journalists & linguists	57.1	59.3	11.9	12.2
Creative & performing artists	59.7	55.4	12.5	11.4
Archivists, librarians, curators & similar and their assistants	25.6	28.1	5.3	5.8
Specialists & technical staff in the artistic & cultural world	165.1	176.5	34.5	36.4
Other occupations	171.3	166	35.8	34.2
Employment in the cultural industries as a % of total employment	2.7	2.8		

Satellite account for culture in Spain. Results for 2008-2012, Ministry of Education, Culture & Sport

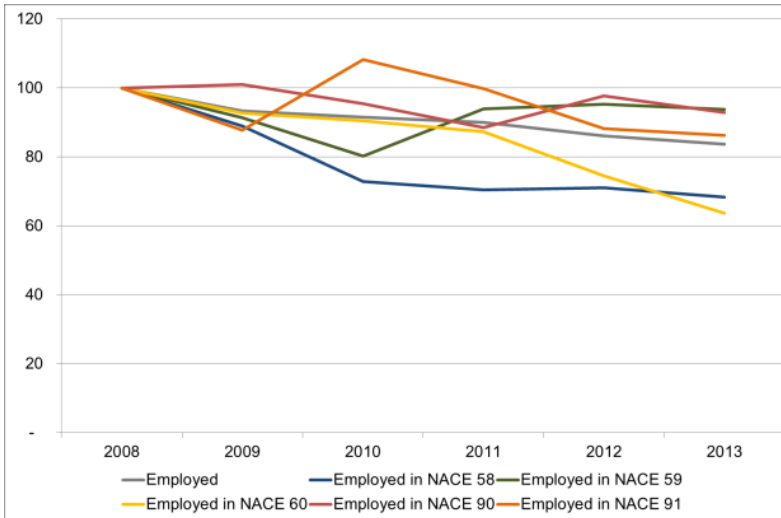
The general trend, which has been quite stable, is shown in the following graph



Source Eurostat

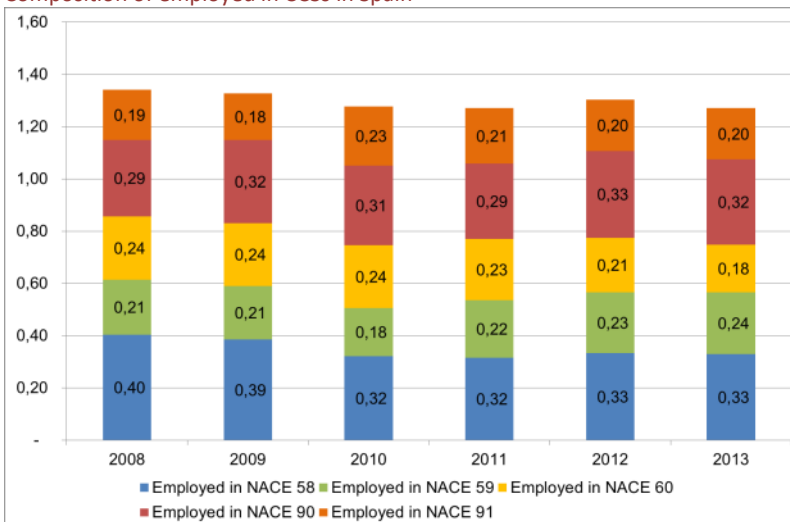
In detail, per subsectors, the “Publishing activities” (NACE 58) and “Programming and broadcasting activities” (NACE 60) are the two sectors which have lost employed, while “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59), “Creative, arts and entertainment activities” (NACE 90) and “Libraries, archives, museums and other cultural activities” (NACE 91) have increased their performances.

Trend in Employment in CCSs for sector of activity in Spain



Source Eurostat

Composition of employed in CCSs in Spain



Source Eurostat

A similar tendency can be observed in young employment where “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) and “Libraries, archives, museums and other cultural activities” (NACE 91) seem to register a better development if compared to other disciplines.

Cultural employment is also characterised by a higher than average level of education; and shows higher education rates greater than those noted in the overall national total: 65% as against 41.2%.

The number of companies listed in the Central Business Directory whose main economic activity is cultural and creative amounted to 108,556 at the beginning of 2013. This figure represents 3.4% of the total number of companies listed in the Directory.

Most of them, 76.3%, 82,833, correspond to industry activities or services, such as activities linked to publishing, libraries, archives, museums, film, video, radio & television, or artistic and entertainment activities, among others, and the remaining 23.7%, 25,723, to activities linked to dealing in or renting cultural items.

61% are companies with no wage-earners, 31.9% are small-sized, from 1 to 5 workers, 6.4% have from 6 to 49 workers and the remaining 0.7% are large companies, with from 50 workers upwards.

In the 2013-2014 academic year a total of 377,360 students enrolled in artistic subjects in the Special Education System. In most cases, 82.8% studied music, 8.8% studied dance, 7.8% studied plastic arts and design and the remaining 0.6% studied dramatic arts.

As for the general education system, in the 2012-2013 academic year, the students who took arts at A-level and vocational training for the cultural sector, made up 5% and 3.8% of the total number of these kinds of students, respectively. The students enrolled on university courses connected to cultural professions made up 6.9% of this kind of education.

Summarizing:

This mapping has collected data from national official sources and studies, but the diversity of the available data and the differing situations not allow to draw a single, general conclusion. For this reason also data from Eurostat are used in order to exploit comparable figures to understand the dynamics and trends in the labour market and in employment in the three countries.

Culture and creativity combine in the three countries diverse ways according to the historical conditions of the various countries, giving rise to partly different models. In Greece, Italy and Spain the CCSs are associated with a country's historic and artistic heritage, made up of both its cultural capital, the outcome of the creativity of past generations, and the artistic production of the current generations.

In relation to the spatial concentration, there's a general trend towards the urbanization of creativity, but in Italy and in Greece we can see a more dispersed existence of creative clusters over the territory. As to variety, the big metropolitan areas have generally undergone a process of diversification, but the dominant pattern is still that of specialization in the traditional creative industries. Conversely, these clusters have direct or indirect spill-over effects on other sectors, industrial or not, and also beyond the specific territory where they are located. This shows that although this study has applied the "from general to particular" approach, the reverse approach might prove to provide interesting results.

On the basis of the analysis carried out so far and with the data available it is, nevertheless, possible to say that the development of the CCSs follows different paths and that has to be connected with other factors like tradition, innovation, skills, technologies, etc.

In all the countries the CCSs not only possess strong innovation potentials themselves, but they also function as an important catalyst for innovations and knowledge-based growth in numerous other economic fields. They act as a cross-cutting sector, affecting value added chains both horizontally and vertically.

For this reason the CCSs make a significant contribution to economic growth and employment (fast rate at which the sector has grown, the fact that it has stimulated new activities and created new and sustainable jobs, the spillover effects....)

In quantitative terms, the economic performance of the creative industries is impressive: the cultural and creative industries account more than the 3% of the GDP in the three countries (2,73% of the total GDP in Greece, 3,2% in Italy and 2.5% of GDP in Spain -3.4% if one takes into account all activities related to intellectual property-), even if the growth rates is varying between subsectors in Italy, Spain and Greece.

This tendency is even more interesting because some industries have a higher percentage of youth employment than the rest of the economy.

A general problem in all the countries under investigation is related to the necessity to foster the link between the qualifications that need to fit for purpose and serve the needs of candidates, employers and the economy. Occupational Standards specifying the standards of performance that people are expected to achieve in their work, and the knowledge and skills they need to perform effectively can be a valid support in this field.

5. Professional contexts and comparative transversal skills for the CCS sub-sectors

The Creative Industries in the three analysed Countries show to be or going to be a world-class sector with, as stressed in the section above, a potentiality of creation of significant employment and good contribution to the national GDP and businesses that range from arts and crafts to very technologic products passing by the designer fashion. In the strategy for supporting the Creative industries appears to be of critical importance to provide adequate compactness and overtake existing barriers, particularly those associated with skills and talent development, which are vital to maintaining competitive advantage. Many of these barriers are a consequence of the distinctive structure of the creative labour market: the sector is characterised by a prevalence of SMEs, micro-businesses, start-ups, freelancers and project-based work with, for example, some 84% of creative media firms. Take into account, that the “urban way” of the Creative industries is a part of the debate we already presented.

In this section we present the result of the analysis of the trends in the field of the transversal and soft skills needed for this sectors.

With the term competences in this report we mean what ESCO and [European Qualification Framework \(EQF\)](#)

define. According to this terminology "competence means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development. They are described in terms of responsibility and autonomy."

"While sometimes used as synonyms, the terms skill and competence can be distinguished according to their scope. The term skill refers typically to the use of methods or instruments in a particular setting and in relation to defined tasks. The term competence is broader and refers typically to the ability of a person - facing new situations and unforeseen challenges - to use and apply knowledge and skills in an independent and self-directed way."

Always for clarifying issues related to the terminology we have defined knowledge as "the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices that is related to a field of work or study."

Both skills and competences rely on factual and theoretical knowledge, the difference lies in the way this knowledge is applied and being put into use. Knowledge is applied and put in use in skills and competences (<https://ec.europa.eu/esco/web/guest/escopedia/-/escopedia/Competence>)

In this Mapping report, in the three countries involved, the authors were asked to analyse the trend related to a list of crucial and critical transversal competences and skills finding what are at the centre of the national debate. The angle required for the analyses was centred on the "transversality" of skills, knowledge and in more general terms competences with the aim of put under the focus "what's hot" and what need to be re-considered in order to support the development of the CCS related sectors.

Taking into account that developing creativity and adaptability is very relevant for these sectors , the so-called subjective competences (assessment of abilities and skills needed to master tasks and solve problems relevant to performance) (Sternberg and Kolligian, 1990) are very significant for the tasks considered in this report. And in particular, heuristic competence as defined as generalized expectancy system concerning the effectiveness of one's abilities across different situations and epistemological competences in order to master tasks and problems within a specific content domain.

This is part of the process of reinforcement of the "Key competences" as content context-independent, applicable and effective across different institutional settings, occupations and tasks. These typically include basal competences, such as literacy, numeracy, general education; methodological competences, like problem solving, IT skills; communication skills, including writing and presentation skills; and judgment competences, such as critical thinking.

It is know that the concept of key competences is developed in a formal document.

Key competences in the shape of knowledge, skills and attitudes appropriate to each context are

fundamental for each individual in a knowledge-based society. They provide added value for the labour market, social cohesion and active citizenship by offering flexibility and adaptability, satisfaction and motivation. Because they should be acquired by everyone, this recommendation proposes a reference tool for European Union (EU) countries to ensure that these key competences are fully integrated into their strategies and infrastructures, particularly in the context of lifelong learning (**Recommendation 2006/962/EC of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning [Official Journal L 394 of 30.12.2006]**).

In the CCS seems increasingly decisive the mix of skills, the multidisciplinary rather than the uniqueness of knowledge occupation-specific, often characterised by poor versatility. This element **is even more significant considering the cultural and creative professions bearers itself tendencies to contamination and the continuous search for originality, or even of uniqueness**. The complex of cultural and creative professions is denoted immediately for a specificity: in almost all of the skills tested, the recognition of the importance of each of them is far superior to the rest of the other professions. This may indicate a more **"demanding" sector**, as creative and cultural professional perform often highly specialized functions, **that require soft skills and ability to move in a varied "fields of knowledge"**. Of course the range of transversal skills vary a lot in relation to the different professions in the different creative and cultural sectors. Some relevant examples are underlined in the countries under analysis.

The mapping analysis leaded in Greece, Italy and Spain is significant considering the cultural and creative professions bearers itself, tendencies to contamination and the continuous search for originality, or even of uniqueness.

According to the **Italian research**, the importance of the ability to process and design complex projects, where it is expected the contribution of several people simultaneously, is attested by the reports by **the ability to work in a group**, in which the 46% of recruitments in 2014 of these figures is considered very important. In second place, but with a significant difference compared to the other professions (not in cultural and creative field) ranks the inclination to work independently (considered very important for 43% of the hiring of creative and cultural versus 37.6% in the case of the other figures), a result that is only apparently in contradiction to what was previously observed. In general, the organizational processes associate an intensive sharing phase with other phases where it is instead required to develop individual solutions and projects, a management system that particularly fits the cultural and creative professions. Flanked on these first two skill described, ranks **the ability to solve problems**, with a marked deviation from the rest of the other figures (39.2 versus 30.7%), which demonstrates the focus on management skills and creation of new solutions, which are typically required to those moving within the creativity and culture sector. Another attitude which focuses much attention of businesses is **the flexibility and adaptation** (considered very important for about 40% of the hiring in creative and cultural sector), which implies being able to adapt to changing operating environments, demonstrating flexibility in managing changes both in terms of the final product, or customer oriented, but also in terms of technology and process.

The remaining categories of skills are all below the 40% of recruitment, although it is worth pointing out, some interesting peculiarities that distinguish the cultural and creative professions. **The ability to analyze and synthesize information** is required more frequently in cultural and creative professions (considered very important for almost 30% of the relevant assumptions, against 23% in the case of the other figures), either because these are often profiles have to do with the production and management of information (think about figures who work in the world of mass media and communication). Also, **the ability to communicate written and oral request** is rather important for cultural and creative professions (considered very important for almost an assumption of three).

As was expected, cultural and creative professions are distinguished from other sectors especially for the demand of resourcefulness, creativity and design, as they are considered very important by the 27% of the relevant assumptions as opposed to only 13% with reference to the rest of the other figures. Finally **the ability to plan and coordinate** (22.1% is high important for the cultural and creative professions), although more frequently request with respect to the other figures is the attitude in saving energy and attention to environmental impact. For the latter expertise is to say that is for a very specific skill that fits just more specifically to certain professional profiles such as crafts.

In **Spain**, the 2012 Culture Observatory survey by Fundación Contemporánea, those working in the cultural industry tend to be highly trained in at least two of the competencies covered: **expertise in their cultural or artistic field** (rated as good or very good in 86.7% of cases) **and management of cultural activities** (good or very good in 83.3% of cases). However there is room for improvement in other aspects such as **communication and marketing of culture** (56.0%), **language skills** (55.2%) and revenue management (rated as average, room for improvement or considerable room for improvement in 69.3% of cases). The survey reveals that more training is needed in the following areas (listed in order of importance): revenue management, communication and marketing of culture, languages, clerical management, management of cultural projects, Internet use, social networks and new technologies and international relations.

Instead, according to a research based on a series of in-depth interviews carried out in 20 young firms active in the creative industries in **Greece** (originated from different creative sectors and subsectors, such as advertising branding and design, fashion and product design, architecture, video games, motion picture and video production), it is revealed some interesting findings regarding the shortage of skills among creative entrepreneurs. The case study work was conducted between May and July 2014 using an interview protocol and the firm founders (or founding team) were interviewed. The creative entrepreneurs interviewed appear to be highly educated and with significant prior working experience in the same industry. Their main motivation for starting up their own business seems to be their need to realize their own ideas. Moreover, they expressed their dedication to expanding their companies while at the same time they stressed that their firms' growth has to occur in a controllable and manageable way, as their main concern is to stay true to their creative identity and not jeopardize the quality of their work.

Professionals active in the creative and cultural sector acknowledge their **artistic and creative expertise as their company's competitive advantage**. In most cases, this is combined with **managerial expertise**, as it is necessary, but they argue that **creativity and innovative ideas** are their main advantages. They feel that their artistic and creative expertise and their technical and engineering expertise differentiate them from competitors. Furthermore, they feel that the quality of their work distinguishes them from competitors. An innovative mind-set is also important, in combination with a deep knowledge of the field. Usually, professionals in the creative field have diverse **skill sets, and offer technical and engineering expertise, market expertise, creative and artistic expertise and managerial expertise**. These creative professionals believe that the artistic and creative expertise distinguishes them from big companies that produce on a massive scale losing the necessary creativity and artistic flair that they have.

In addition the creative professionals interviewed stressed the importance of **entrepreneurial skills to their businesses**. More specifically, they suggest that the most relevant entrepreneurial/managerial skills for their industry are **communication skills** and **problem solving skills**, which they utilize every day in order to have meaningful communication with their customers and meet all of their needs. They consider **leadership skills**, communication skills, problem solving skills and **networking skills** very important to their businesses, as apart from the creative part they still have to run their companies and cooperate with clients and partners. They also need to possess creative thinking so as to be successful in their work. An international export vision is essential, especially for the firms that aim at international markets. In addition, they believe that they need leadership and networking skills, business plan vision, **administrative/financial skills** and readiness to take risks in order to grow and expand their firms. Creative professionals feel that readiness to take risks is the only way to succeed in this industry.

In all the countries under analysis a common data emerged: the transversal and soft skills are gained mainly through learning-by-doing, on-site learning experiences and internships. Creative professionals value lifelong learning initiatives and training courses, although such opportunities are rare and not always useful due to their theoretical approach. However, they consider attending courses, exhibitions and communicating with fellow creators in other countries extremely important, because this way they learn and grow.

6. Transversal and soft skills in CCS: an analysis for defining the critical abilities for successful job performances

The creative arts sector is characterized by **the predominance of non-standard forms of employment**. Careers in the sector develop on a **project-by-project basis**, which has huge implications in terms of income, skills development, work organization and the social statuses adopted. The specific factors are combined with other broader issues like appropriate entrepreneurship, financing, and social security cover for people working on short-term contracts.

The term "project-based work" is derived from artists' working methods, which are extremely varied; their working method differs from traditional salaried employment, since in the vast majority of cases, it is characterized by a sequence of short-term contracts, with changing teams and roles (project backer, stakeholder, contractor, etc.). The professional network is fundamental to the development of artists' careers, both in terms of hiring, and of exchanging ideas and skills. For some people, the sector is a vast network of individual entrepreneurs, where you need to be flexible, mobile and cutting-edge to be successful. A project provides the opportunity to create a team that is as temporary as the length of the project. Each stakeholder must devote all their efforts to the project, and is held responsible for its successful outcome.

Several specific features and issues therefore arise in this context. First and foremost, fragmentation: that of the role of institutions, social solidarity and income. Next, there is the issue of creativity: it is hard to be creative, up to speed with new information on trends, and to give one's best all the time. Time to resource and renew is not allowed, or at least not paid for. Lastly, and more fundamentally, there is the problem of social solidarity, regardless of whether it is at the individual or societal level. In the first case, social solidarity is likely to be functional, and to limit itself to the period of the project. At the societal level, professionals in the creative arts sector find it hard to benefit from social security cover, because their paid working periods are too limited, while their income is not continuous, and is often low. This means that artists are not only exposed to the risk of being excluded from a social security cover scheme, but also from ongoing training services or conventional banking services, due to the lack of a system that is able to take the specific features of project-based work into account. **Working conditions for professionals in the cultural sector are therefore very fragile.**

Creative economic activity has a positive impact on development: because people's creative skills and competences are often rooted deeply in culture, traditions and history, creative industries do not only have an impact on economic development but are strongly linked with social, cultural and sustainable development, with creative workers being "enablers, as drivers of more inclusive, sustainable and meaningful development" (Bokova 2013).

In the context of the **report** which aims at exploring and recording the dynamics of the Creative and Cultural Sector in the involved Countries, the attempt has been focused on the detection and precise definition of the knowledge, skills and in general terms of the competences required in various branches of the creative sector nowadays, and, on the other hand, the aim is to fix the deficit observed in substantial horizontal skills. The development and further strengthening of these skills through adequate education and training programs in these sectors is considered essential in order to stimulate creative entrepreneurship and reduce the relative unemployment.

The list of competences is very large, however in the three Countries, as mentioned before, the focus was done on those areas emerged as very critical.

The creative business needs to be self- promoted, in this terms the entrepreneurial skills will be very important, as well as the protection of the property once launched in the market

The first categories are the following:

Entrepreneurial skills, such as leadership skills, business management, project management, communication skills and networking, financial management, etc.

- ☞ Skills related to the **sales and marketing** of products and services
- ☞ Skills relating to the **protection of intellectual property rights**
- ☞ Skills related to the **utilization of new technologies** (e.g. the lack of creative and technical skills to produce content for distribution for distribution to all potentially available technology platforms, and the ability to understand and exploit technological advances)

Creative skills that can be related to specific sectors (e.g. creative writing skills or musical composition skills that may be necessary to the film and music industries, performing arts , etc.)

Soft skills refer to a cluster of personal qualities, habits, attitudes and social graces that make someone a good employee and compatible to work with. Soft skills are highly valued because research suggests and experience shows that they can be just as important an indicator of job performance as hard skills.

These categories can be defined in more details:



Entrepreneurial skills

Some indicative entrepreneurial skills are:

1. Initiative, creativity and innovating thinking

It is the ability to develop fresh ideas that provide solutions to all types of challenges. More specifically:

- ✓ plans works and carries out tasks without detailed instructions
- ✓ makes constructive suggestions
- ✓ sees old problems in new ways and has novel approaches to solving those problems.
- ✓ prepares for problems or opportunities in advance
- ✓ undertakes additional responsibilities
- ✓ responds to situations as they arise with minimal supervision
- ✓ creates novel solutions to problems
- ✓ evaluates new technology as potential solutions to existing problems
- ✓ finds ways to turn the ideal into reality
- ✓ connects seemingly unrelated ideas, events, and circumstances to find global solutions to individual problems

2. Cooperation/Team work

Cooperation and team working skills promote cooperation and commitment within a team to achieve goals and deliverables. More specifically, an individual having such skills:

- ✓ works harmoniously with others to get a job done
- ✓ responds positively to instructions and procedures
- ✓ is able to work well with staff, co-workers, peers and managers
- ✓ shares critical information with everyone involved in a project
- ✓ works effectively on projects that cross functional lines
- ✓ helps to set a tone of cooperation within the work group and across groups
- ✓ coordinates own work with others
- ✓ when appropriate facilitates discussion before decision-making process is complete
- ✓ works effectively with different personalities across a variety of social and professional situations
- ✓ builds professional relationships

3. Communication

Communication skills enable an individual to be comfortable to communicate well with other people using a broad range of communication styles, and choose appropriate, effective ways to communicate to audiences in diverse situations. More specifically an individual with such a skill:

- ✓ communicates in a respectful tone and manner
- ✓ listens actively and communicate effectively with others
- ✓ writes and speaks effectively, using conventions proper to the situation
- ✓ states own opinions clearly and concisely
- ✓ demonstrates openness and honesty
- ✓ explains reasoning behind own opinions
- ✓ asks others for their opinions and feedback
- ✓ asks questions to ensure understanding
- ✓ exercises a professional approach with others using all appropriate tools of communication
- ✓ uses consideration and tact when offering opinions.

4. Problem Solving

Problem solving skills builds a logical approach to address problems or opportunities or manage the situation at hand by drawing on one's knowledge and experience base, and calling on other references and resources as necessary. An individual having such a skill:

- ✓ anticipates problems
- ✓ sees how a problem and its solution will affect other units
- ✓ gathers information before making decisions
- ✓ weighs alternatives against objectives and arrives at reasonable decisions
- ✓ adapts well to changing priorities, deadlines and directions
- ✓ works to eliminate all processes which do not add value; is willing to take action, even under pressure, criticism or tight deadlines
- ✓ takes informed risks
- ✓ recognizes and accurately evaluates the signs of a problem
- ✓ analyses current procedures for possible improvements
- ✓ acknowledges when one doesn't know something and takes steps to find out

5. Sense of initiative and entrepreneurship

Sense of initiative and entrepreneurship refers to an individual's ability to turn ideas into action. It includes creativity, ingenuity, innovation and risk taking, as well as the ability to plan and manage projects in order to achieve objectives.

This means:

- ✓ to create and exploit opportunities
- ✓ to develop a network of personal contacts and support
- ✓ to induce and prepare changes rather than trying to respond when you arise
- ✓ to suggest changes in the context of teamwork
- ✓ to face challenges with vigor and to take responsibility for your decisions and actions
- ✓ to be able to make decisions, set goals and plan the steps to achieve them
- ✓ to be able to identify strengths and weaknesses in a situation or a project
- ✓ to be able to demonstrate foresight, determination, willpower, responsibility, adaptability, optimism.

This skill is particularly important as it is linked to the understanding of the working framework, the assessment of opportunities and risks, the exploration and exploitation of challenges and innovation. This skill should mainly characterize those who choose to start their own business. However, in today's labor market it is important to exhibit entrepreneurial spirit, whether one wishes to create his/her own business or not, because it helps people to expand career opportunities, to pursue personal development and to meet the challenges and uncertainty in the workplace, with ingenuity, flexibility and efficiency.

6. Planning & organizing

An individual who demonstrates planning and organizing skills establishes a systematic course of action for self or others to ensure accomplishment of a specific objective. More specifically, he/she

- ✓ identifies the sequence of tasks and the resources needed to achieve a goal, and prioritizes key action steps
- ✓ Anticipates the impacts and risks of decisions and actions.
- ✓ Seeks and uses others' input about critical actions, timelines, sequencing, scope, methodology, expected outcomes, and priorities. Sees potential challenges and opportunities, and adjusts plans based on input.
- ✓ Creates realistic schedules for projects and follows them. Evaluates progress against schedule and goal.
- ✓ Monitors and evaluates social, fiscal, and political trends that affect the plan.
- ✓ Prepares strategies to deal with problems or drastic changes.
- ✓ Evaluates proposed actions and timelines against organizational mission and values.
- ✓ Integrates the current plan with other plans as needed to achieve the overall mission.

7. Entrepreneurial Orientation

This skill encompasses the ability to look for and seize profitable business opportunities and the willingness to take calculated risks to achieve business goals. An individual who demonstrates entrepreneurial orientation

- ✓ notices and seizes profitable business opportunities
- ✓ stays abreast of business, industry, and market information that may reveal business opportunities
- ✓ demonstrates willingness to take calculated risks to achieve business goals
- ✓ proposes innovative business deals to potential customers, suppliers, and business partners
- ✓ encourages and supports entrepreneurial behaviour in others.



Skills in the use and exploitation of new technologies or digital skills

- ✓ Use of computer and specific programs (computer / design programmes) as a work tool
- ✓ Familiarity with new technologies
- ✓ Option to participate in digital social media
- ✓ Skills for content production and its distribution to all potentially available digital platforms



Intellectual property protection Skills

- ✓ Understanding Intellectual property law (patents, industrial design, trademark, copyrights) for protection against piracy, with a particular emphasis on addressing illegal downloading and copyright infringement.



Creative skills

The Creative Skills are a way of thinking, and are essential for any task especially those addressed to the creative sectors. The process supported by the creative skills foresees few techniques to provide exposure to a wide variety of ideas.

The Mapping allowed to present the following creative skills:



1- Skills of manage and promote Brainstorming

Brainstorming allows a group of people to contribute ideas on a topic without regard to how practical they may be. The purpose is to come with an "outside the box" solution that might not occur otherwise. While many of the ideas generated may not be feasible, it is possible that by removing practical constraints, an idea will surface that can be transformed or translate into a workable solution. Another advantage is that it is easier to receive input from several people instead of just one or two individuals.



2- Management of and techniques of Asking "What-If" Questions

The process of asking "what if" questions can lead to new discoveries that result in improvements or growth. For example, you can consider what would happen if you started to perform a process in the opposite

manner of how you currently do it or if you added weekend hours of operation. You can also explore the possibilities of opening a second location or even buying out your top competitor. "What if" questions are often the source of big ideas.

3- Management and organization of Role-Playing

Role-playing can give a different perspective that can lead to helpful ideas. For example, role-playing session can give much better understanding of what customers and colleagues think during the presentations of works and products. This can help to anticipate common objections the customers may have and develop a plan to overcome them.

4- Provocation Techniques

Provocation is a process where intentionally is supported and stimulated creative thought. The provocation is a critical way to promote new ideas especially in the creative sectors. Trough provocation the artists, but not only the artists can try to imagine and foresee new scenarios and contexts

Soft skills

1. Personal management

Personal management skills refer to the ability to understand oneself and be conscious of the implications of the interactions with others. More specifically, an individual exhibiting such a skill should be able to:

- ✓ act with honesty, integrity and personal ethics
- ✓ recognize personal efforts and the efforts of others
- ✓ acknowledge diverse opinions and accept differences
- ✓ manage personal health and emotional well-being
- ✓ take responsibility and demonstrate resiliency and accountability
- ✓ plan and manage personal time, finances and other resources
- ✓ assess, weigh and manage risk in the face of uncertainty
- ✓ recognize strengths and areas for improvement
- ✓ adapt to new environments and cultures

2. Reliability

A reliable individual demonstrates a high level of dependability in all aspects of the job. More specifically he/she

- ✓ shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of one's work
- ✓ completes all assigned tasks on time and with minimal supervision
- ✓ arrives at work on time every day
- ✓ fulfils all commitments made to peers, co-workers, and supervisor
- ✓ works to achieve agreement (by offering alternatives, etc.) on time frames or objectives that can be realistically met

3. Flexibility/adaptability

A flexible/adaptable individual displays openness to different and new ways of doing things and willingness to modify one's preferred way of doing things. More specifically, he/she

- ✓ remains open-minded and changes opinions on the basis of new information
- ✓ performs a wide variety of tasks and changes focus quickly as demands change
- ✓ manages transitions from task to task effectively
- ✓ adapts to varying customer needs
- ✓ is able to see the merits of perspectives other than his/her own
- ✓ demonstrates openness to new organizational structures, procedures, and technology
- ✓ switches to a different strategy when an initially selected one is unsuccessful
- ✓ demonstrates willingness to modify a strongly held position in the face of contrary evidence
- ✓ looks for ways to make changes work rather than only identifying why change will not work
- ✓ adapts to change quickly and easily
- ✓ makes suggestions for increasing the effectiveness of changes

4. Writing skills

An individual exhibiting sufficient writing skills conveys ideas and facts in writing using language the reader will best understand. More specifically, he/she

- ✓ uses correct vocabulary, spelling, grammar, and punctuation
- ✓ composes clear, direct, concise, complete messages
- ✓ chooses the most effective and meaningful form to express ideas and information
- ✓ uses bullet points, tables, or other tools to organize and present detailed or complex information
- ✓ adapts the content, tone, style, and form to suit the needs of the reader, the subject, and the purpose of the communication
- ✓ uses plain talk to explain complex or technical concepts
- ✓ organizes information so that facts or ideas build upon one another to lead the reader to a specific conclusion
- ✓ uses formal writing styles or advanced literary techniques and formats suited to the job

5. Communication in a foreign language

The ability to express and interpret concepts, thoughts, feelings, facts and opinions in both oral and written form (listening, speaking, reading and writing) and to interact linguistically in an appropriate and creative way in a full range of societal and cultural contexts.

However, there are two apparently **contradictory trends in skills demand**: increasing specialization (especially among freelance workers), and a need for generalists (people with high level skills and wide-ranging experience). The latter could be interpreted as a need to increase the level of multi-skilling.

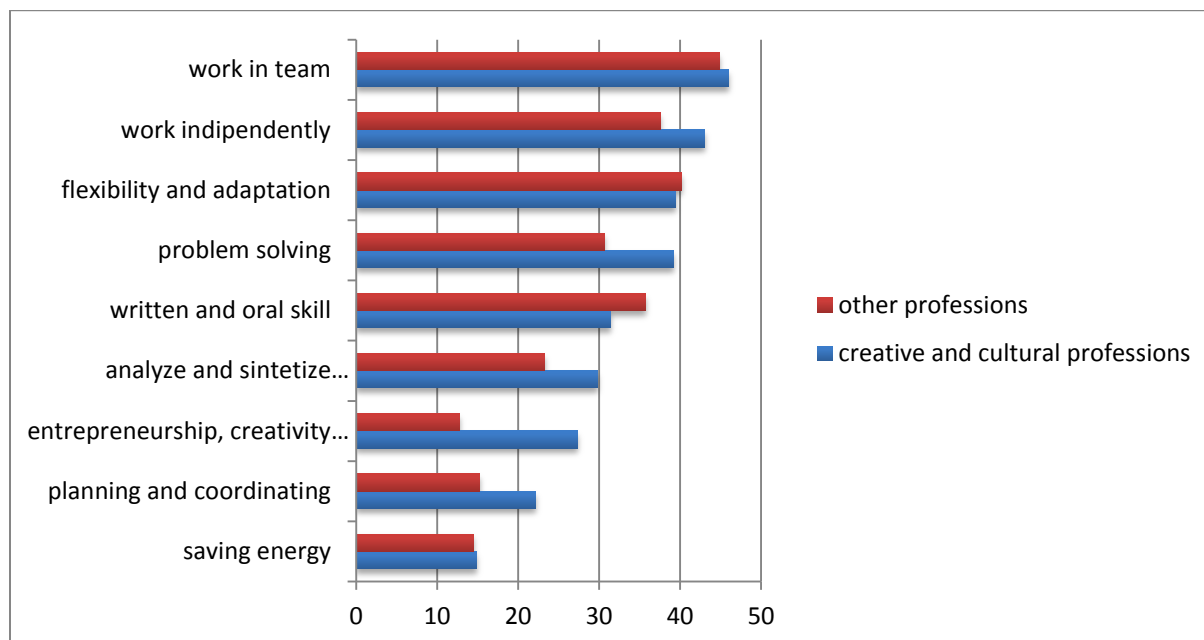
In this competence analysis the term competence stands for: the measurable or observable knowledge, skills, abilities and behaviors (KSABs) critical to successful job performance.

Choosing the right competencies allows the profiles to:

- ☞ *Plan how they will organize and develop their performance*
- ☞ *Determine which strategy best fits their business/professional needs*
- ☞ *Define and select the external resources (material and immaterial) for performing the task.*

In **Italy**, the so-defined transversal skills are considered "very important" for the recruitment of creative and cultural professionals in 2014, in comparison with other professionals. This is the result of a national research made by the national chamber of commerce. (see the table below)

Resource: Unioncamere - Ministero del Lavoro, Sistema Informativo Excelsior2014 "CULTURA E CREATIVITÀ: GLI SBOCCHI DI LAVORO PER I GIOVANI SISTEMA INFORMATIVO EXCELSIOR I fabbisogni professionali e formativi per il 2014")



Again, according to the Italian research of Unioncamere, the ability to work in teams is required mainly to certain professionals with high dose of creativity, such as graphic designers and setter of scenes, as well as some computer professionals applied in creative and cultural field (analysts and software designers and technical programmers), as well as industrial engineers applied into creative industries. Among middle-lower profession levels the ability to work in teams is requested to unskilled professionals in recreational and cultural services.

Industrial engineers is required the ability to work independently, as well as the marketing professionals (who must know how to approach individually to customers) and to artisans and skilled footwear field workers. The ability to work independently is an undeniable virtue for them because of the nature and uniqueness of their work. Technical marketing profiles and footwear artisans give great importance to the ability to analyse and synthesize information, together with analysts and software designers and technical programmers. The footwear artisan stand out also for the request for problem solving skills together with marketing professionals and industrial engineers.

The sharp divergence between high skill and low/medium-skill is clear observing the request for resourcefulness, creativity and design, a requirement considered by companies very important for 35.7% of recruitment of high skills figures and only 21, 3% for medium-low level.

Among the individual figures in which companies frequently require resourcefulness, creativity and design, are marketing technicians (which should always come up with new marketing strategies), artistic directors, actors, writers and designers, graphics, designers and setter of scene (which confirm the strong link between culture and creativity), and the cooks (whose creativity is the added value of their work).

The management and coordination ability is a very special skill, required to few professionals including industrial and management engineers.

A special feature is the attitude to energy saving related to those professions directly related to production processes and manufacturing which are usually the ones with the highest environmental impact, or craft, where, however, the energy consumption can be relevant.

In **Spain**, since 2012 the State Public Employment Service (SEPE), has prepared a record containing the professional profiles for which hiring showed a positive development over the previous 18 months. In the “es.competencias” project the Confederation of Organisations for the Social Economy in Andalusia also prepared the “study to identify Key Competences, Professional Profiles and New Sources of Employment in the Andalusian Economy”, in which the most called-for professional profiles are listed.

In **Greece**, a recent research (British Council, 2011) indicates a shortage of practical work opportunities and entry-into-the- sector initiatives for young people. Young people were also observed to lack international exposure to best practice, soft skills and technical/ discipline-based knowledge. In terms of skills shortages,

research participants observed a shortage of technical personnel with the necessary skills to support the high quality production of performances, music and film. The Research attributed this skills shortage to an apparent lack of training facilities for technical professions across Greece. In addition, a shortage of cultural managers and curators was identified in the research, though this finding did not emerge as strongly during qualitative analysis. Suggested explanations for these skills- shortages include: vacancies in state institutions which remain unfilled due to recruitment freezes; and an economic climate which requires new curators and arts managers to arrive equipped with competencies in marketing, business, finance, policy, digital etc. – something education institutes have not historically placed great emphasis on. (British Council, Cultural Skills Unit research, 2012)

In conclusion, in the Country involved it is possible to register some common trends, in particular related to the competences, skills and knowledge shortage.

The main problems appears to be the need of reinforcing the business financial and digital competences, being the employees of the Creative sectors more and more independent and self employed operators. The knowledge of the market and the opportunity represented by the ICT exchanges require the presence, together with the transversal described skills, of specific soft skills addressed to promote one-self and to be integrated in a very fragmented market. Furthermore, the interexchange among the EU context requires new communication skills and new attitudes, form the general knowledge of foreign languages, first English, and competence in writing expressly in technological contexts.

Networks and connections have always been useful. The rapid rise of social media over the past decade shows in vivid terms the benefit and power they hold. In a complex world, individuals and organisations, both small and large, are increasingly looking to collaborate with sectors and groups who share similar goals. Powerful, robust connectivity is essential for success.

In the following table table the most called-for professional profiles are listed as well as the cross-cutting competences associated with each professional profile in the cultural and creative sector. As we mentioned before, the sectors and sub-sectors of the CCS are quite fragmented and not homogeneous. The table shows in an attempt of presenting a summative way the impact of the skills shortage in this specific field with an eye to the transversal skills generally indicated in the national reports as critical, both in negative and positive terms.

SECTOR	PROFESSIONAL PROFILE	- ASSOCIATED CROSS-CUTTING COMPETENCES
HANDICRAFTS	Metalwork Blacksmith	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Teamwork - Creativity
CULTURAL HERITAGE	Rural tourism promoter	<ul style="list-style-type: none"> - Oral and written communication - Knowledge of a second language - Capacity for information management - Teamwork - Work in an international context - Interpersonal relationship skills - Ethical commitment - Adaptation to new situations
	Tourist guides	<ul style="list-style-type: none"> - Oral and written communication - Knowledge of a second language - Work in an international context - Recognition of diversity and multiculturalism - Knowledge of other cultures and customs
	Cultural heritage manager	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Teamwork - Adaptation to new situations
DESIGN	Multimedia and graphic designers	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Teamwork - Adaptation to new situations - Creativity
	Video-game developers	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Teamwork - Autonomous learning - Creativity - Leadership - Initiative and entrepreneurial spirit
	Computer programmers	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study

		<ul style="list-style-type: none"> - Teamwork - Work within multidisciplinary teams - Autonomous learning - Creativity - Entrepreneurial
	Information technology professionals	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the field of study - Capacity for Information Management - Problem-solving - Teamwork - Creativity
	Set designer	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Knowledge of IT relative to the field of study - Decision-making - Adaptation to new situations - Creativity - Initiative and entrepreneurial spirit
	2D & 3D animation technician	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of It relative to the area of study - Decision-making - Teamwork - Ethical commitment - Autonomous learning - Adaptation to new situations - Creativity
MUSIC	Musician	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Capacity for information management - Teamwork - Work within multidisciplinary teams - Autonomous learning - Adaptation to new situations - Creativity
	Sound designer	<ul style="list-style-type: none"> - Capacity for organisation and planning - Knowledge of a second language - Knowledge of IT relative to the area of study - Teamwork - Recognition of diversity and multiculturality - Adaptation to new situations - Creativity - Leadership
	Sound technician	<ul style="list-style-type: none"> - Capacity for organisation and planning

		<ul style="list-style-type: none"> - Knowledge of a second language - Knowledge of IT relative to the area of study - Decision-making - Teamwork - Critical reasoning - Creativity
PLASTIC ARTS	Sculptor	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Teamwork - Creativity
LITERARY ARTS	Advertising, marketing and public relations professionals	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Capacity for information management - Problem-solving - Teamwork - Creativity - Leadership - Knowledge of other cultures and customs
	Documentary maker	<ul style="list-style-type: none"> - Capacity for analysis and synthesis - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Decision-making - Teamwork - Interpersonal relationship skills - Critical reasoning - Creativity - Leadership
STAGE ARTS	Actor/actress	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Capacity for information management - Teamwork - Work within multidisciplinary teams - Autonomous learning - Adaptation to new situations - Creativity - Knowledge of other cultures and customs
	Audiovisual recording technicians	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Decision-making - Teamwork - Interpersonal relationship skills - Adaptation to new situations - Creativity - Leadership
	Audiovisual	<ul style="list-style-type: none"> - Oral and written communication

	postproduction and editing manager	<ul style="list-style-type: none"> - Problem-solving - Decision-making - Teamwork - Interpersonal relationship skills - Adaptation to new situations - Creativity
	Audiovisual technician	<ul style="list-style-type: none"> - Capacity for organisation and planning - Knowledge of a second language - Knowledge of IT relative to the area of study - Decision-making - Teamwork - Critical reasoning - Creativity
	Dancer	<ul style="list-style-type: none"> - Capacity for organisation and planning - Oral and written communication - Knowledge of a second language - Knowledge of IT relative to the area of study - Capacity for information management - Teamwork - Work within multidisciplinary teams - Autonomous learning - Adaptation to new situations - Creativity

7. The Stakeholders' opinion about the professional needs and the transversal competences in the CCS

Stakeholder Analysis is the process that enables to identify “any group or individual who can affect or is affected by the achievement of the organization's objectives” (Freeman, 1984, p. 46) and analyze their attitude in relation to a specific issue. The aim of Stakeholder Analysis is to “develop a strategic view of the human and institutional landscape, and the relationships between the different stakeholders and the issues they care about most”⁴.

In this report the stakeholders analysis was conducted in the three countries. Data and information were collected through a qualitative research that included on-site visits, focusing activities, observations and/or individual in-depth and semi-structured interviews through questionnaires.

The information were then integrated by secondary data such as press releases, reports and local newspapers articles.

These stakeholders form a spectrum of interested parties ranging from organization's representatives to employed in the CCS, from professionals in the field to public representatives operating in the cultural and creative sector.

In all the countries the core knowledge and skills required, underlined by the stakeholders, are:

- understanding of the creative industries from a variety of perspectives and key aspects
- entrepreneurship and creativity
- understanding cultural value
- reflexive engagement with practice

In particular the **culture-based creativity** is seen as an essential feature: a firm needs more than an efficient manufacturing process, cost-control and a good technological base to remain competitive. It mainly requires a strong brand, motivated staff and a management that respects creativity and understands its process. It also needs the development of products and services that meet citizens' expectations or that create these expectations. Culture-based creativity can be very helpful in this respect. Culture-based creativity is therefore a key input for communicate more effectively and for contributing to product innovation.

For the stakeholders in the three countries also **digital technologies** play an important role in this intangible economy as they provide new forms of social exchanges and contribute significantly to new expressions of creativity. Of course cultural production (such as music, publishing and movies) makes new technology even more relevant.

⁴ Source: Babou (2008) in <http://www.pmhut.com/what-is-stakeholder-analysis>

Of course, creative enterprises are essentially enterprises in which **creative skills** play an important role. Attracting creative skills and managing them efficiently are thus the most important conditions for success.

Even if few of the respondents say that creative skills are the result of a genius that does not need training, most of the stakeholders have underlined the importance of the up-dating of the competences and of giving an ongoing training. In this framework the creative enterprises are faced with two handicaps that minimize their efforts in the field of training:

- Their size: because they are small, they do not have sufficient and flexible monetary resources that can be invested in training.
- The volatile nature of their jobs: many jobs in creative enterprises are short-term or part-time jobs, which makes them reluctant to invest in human resources that will leave the enterprise after a short period.
- The distinctive nature of creative skills that are inherent and not acquired, although this is a misconception. Further, in the culturally creative sub-sector, many people are entrepreneurs of their own skills so, for instance, they need to have some basic knowledge of law, finance and accounting...

Compensation can be a solution: in a particular situation, a creative enterprise may find it advantageous to commit itself to providing on-the-job training to an employee. An employee can complete his/her initial training or artistic education by assimilating the required techniques through formal training programs, apprenticeships, job rotation, cross-training and coaching.

Other than this, some entrepreneurial competences are needed. Of course each branch of the cultural and creative sector practices entrepreneurial skills to a lesser or greater extent, anyway all of them requires a special kind of **business sensitivity**.

Finally it was put in evidence that the creative organizations foresee employed for very different positions to fulfill their objectives. Hiring a film director or filling an administrative post such as that of an assistant require different strategies, and of course a very different set of skills and competences.

Below a detailed analysis in the three countries shows the relevant stakeholders' opinions about the situation of the transversal competences and professional needs.

Italy

Semi structured interviews and ad hoc questionnaires were conducted with 20 relevant stakeholders/people related in different ways with cultural and creative sector ⁵.

Cities	Cat. 1 Professionals	Cat. 2 Just Employed	Cat. 3 Organisation representatives	Cat. 4 Unemployed	Tot.
Rome, Milan, Bologna, Catania, Ancona	7	5	4	4	20

Skills needed:

Attributes: diplomacy, courage, humility, sensitiveness, understanding of contexts, focus, flexibility, patience, tenacity, structure, perseverance, strong motivation and energy, ability to make decisions, relate well with others.

Other: dynamism, eagerness to learn, passion and motivation, experiences abroad denoting linguistic skills but also openness, independence and growth of candidates.

The interviewees reiterates a recurrent point in the survey: employers deal with heterogeneous profiles and finding an ideal mix (in the Italian case: flexible competent and motivated professional with strong organisational skills) is difficult.

Further to skill development report that skills related to administration and budgeting are often mentioned by job-seekers as the ones needing further development (especially for cultural managers) – this appears to highlights the importance of hard skills related with financial matters, crucial to the survival of the cultural sector in a time of decreasing public subsidies. Also a lack of communication between employers and job-seekers regarding the real needs and dynamics of the sector was noted. This gap is also put in evidence between education and job market. This situation points to the need of fostering and increasing the interaction between the different stakeholders in order to prepare candidates in the best possible way.

⁵ This interview is done within the CREA.M project 518533-LLP-1-2011-1-IT-LEONARDO-LMP, funded with support from the European Commission. http://www.adameurope.eu/prj/8386/prj/new_curriculum_framework_EN.pdf

The topic of creative thinking appears to follow, according to some of the data, the binary of generic versus specialized positions, where people occupying the latter are perceived as needing to ‘do the job’ (however this does not preclude the use of ‘some’ innovation).

Experience is identified in the research as the most important means to acquire and develop the right set of skills, knowledge and attributes for employment.

Reported **formative experiences** are mostly related with on-the-job experiences (including internships and freelance or own project initiatives) of performing different roles and through observation and interaction with colleagues (senior and otherwise). Education is also, but in a smaller number of cases, mentioned as a source of formative experiences: inspiring teacher (secondary schooling) or guest speaker (higher education). Teachers and relatives are identified as key people triggering formative experiences.

Serendipity is mentioned as playing an important role in formative experiences through “fortunate encounters” and contacts with key people.

In Italy, knowledge in the humanities/a strong cultural background was considered a necessary basis for employment, while “the concrete technical abilities needed to work are learnt through direct experience”.

Data point to the fact that job applicants are not sufficiently aware of the importance of non-formal and informal learning in a job application, thus they do not highlight it enough.

Experience in the work place through the above mentioned short to medium term opportunities (often unpaid or low paid) appears to present advantages to all those involved in the process of employment: employers, applicants and also to educational institutions that are often involved in the process. Employers are able to count on precious help and expertise to develop their activities for no or low cost – at times these placements are a solution to understaffing, which is inadequate and unfair. Internships (and similar) also offer an opportunity for employers to meet potential future employees and see how they are, fit in the team, adapt to the organization, with no further obligations; inject new ideas in the organization. Applicants are able to experience a range of professional situations and tasks with a limited level of responsibility, thus building up a portfolio of evidence useful for future job applications. They can also learn by observing the best practices of the organizations and start to build their own networks of contacts.

Educational institutions also benefit from the links between students and professionals when placements are a part of their programme of studies: professionals are an open door to what is happening in the field, their knowledge can feed into academic research, thus this institutions are able to accurately monitor and reflect on what is happening; students are given an important asset for employability as practical experience is determinant in the process of gaining employment – thus these courses will be more sought after; develop curriculum in line with sector needs, thus equipping future workers with the necessary skills.

Interviewees remarked the need for a better and stronger link between internships offered by universities and the actual needs of the sector, in order to contrast the current vicious trend of unpaid stages not leading to any concrete job opportunity.

Previous connections and knowledge of individuals and organizations appears to be quite important to gain employment in Italy. The interviewees mention that **internships/placements** are an opportunity for employers to meet future collaborators, which is of paramount importance as “In general the sector is perceived as a field in which connections and personal knowledge of people can make the big difference in gaining employment”. It is particularly striking that “All the interviewees that succeeded in gaining employment went through recruitment processes thanks to direct connections with people and knowledge of individuals working for the institutions that hired them”. These networks of contacts can thus have dual effects of enabling a few and barring access to many to job opportunities.

Criticism of internships/stages is evident in some of the data collected. Some of the stakeholders (who made this kind of experience) report that internships and stages “are not structured to educate and train for real jobs and don’t have enough connections with the job market”. It appears a restructuration of internships/placements is in need so that they are useful for job applicants and not merely a way of an organisation ‘getting work done for nothing’. In a way that is why the perception that stages in smaller organisations are more valued than those in bigger ones, as in the latter tasks are much more broken down, while in the first case the intern will have an opportunity to do many more things.

The interviewed organization representatives seem to provide some sort of integration/induction for new employees. “In Italy, professional integration is not structured and it’s often perceived as of low importance: there is a lack of an organisational culture focused on human resources in the Italian cultural organisations, from selection to management of staff”.

Stakeholders mention also the **lack of a common vocabulary to talk about roles, skills/attributes** across the cultural and creative sectors. The European dimension makes this more complex and potentially enriches this situation.

A classic topic arises about the debate of ‘cultural manager’, artist versus manager binary: “The artistic component of the job sometimes *overcomes* the concrete tasks people would become in charge of”. This is perceived as a problem by employers that value more the organizational and managerial skills and attitude and fear applicants might be “missed artists”.

Greece

To identify the specific skills shortage in the Creative and Cultural Sector in Greece the method of focus groups was used. This method is an important qualitative data and information mining tool, through a process of direct interaction between participants of the group on this issue. The focus group organization

took into account as many interested parties (stakeholders) as possible and included representatives from diverse organizations such as universities (Panteion University and the National Technical University of Athens) the Ministry of Culture, the Industrial Property Organization, a vocational education centre, the Bank of Greece and two entrepreneurs (from the music and theatre industries). The focus group provided information and data on the basis of targeted questions on:

- ✓ The shortage of horizontal skills (entrepreneurial skills, digital skills, intellectual property skills and soft/non-technical skills) in the creative and cultural sector in Greece
- ✓ How can horizontal skills be acquired and which educational/training approach is deemed as more suitable for acquiring such skills
- ✓ Which factors facilitate or inhibit the growth of the cultural and creative sector in Greece

Regarding the **basic horizontal skills in the cultural and creative sector** in Greece the majority of stakeholders stressed that although creative entrepreneurs may possess some basic technological and digital skills they certainly appear not to have fundamental managerial/business and marketing skills, i.e. important skills for firms' survival and growth. However, they also mentioned that personal networks of creative and cultural entrepreneurs already active in the sector definitely help to this direction and may provide some support. Stakeholders also suggested that additional problems arise in firm management, as the majority of creative and cultural businesses in Greece are not usually able to hire professional managers and therefore the likelihood for growth and expansion are usually scarce. In such cases, it was emphasized that the creative entrepreneur needs first of all to be able to network with other professionals. It was also clearly stated that despite the fact that creative entrepreneurs in many sectors (both in the creative and cultural industries) are interested to target international markets they lack the knowledge (e.g. designers don't know how to target global markets) and necessary resources to do so. They usually do this mainly through informal personal networks.

More specifically, regarding the theatre industry it was confirmed that specific skills are very much needed in this sector which incorporates a great range of activities ranging from Greek tragedy to musicals. In particular, it was stressed the need for targeted training programs, for example in Ancient Greek so that the actors become able to better understand the language they use when performing Greek tragedies. However, apart from the identified shortage in specific creative skills (e.g. singing, dancing skills etc) closely related to an actor's profession, it was emphasized that diverse management skills are also required for an efficient and profitable operation of a theatre business. In this vein, the relevant stakeholder suggested that theaters need people with multiple skills ranging from theater and productions management skills to economic and financing skills, human resources and personal relations skills and even building maintenance skills. On the other hand it was mentioned that traditional professions closely related to the theater business in Greece, such as shoe makers, costume makers, painters and people who create the theater sets are almost extinct. One other significant problem theaters usually face is the lack of distribution networks for theatrical shows. This practically means that the audience interested in seeing a performance will have to go to big cities such

as Athens or Thessaloniki, while theaters in the periphery Greece remain unused. In this vein, entrepreneurs in the theater industry need to acquire knowledge and skills on how to sell and distribute their “product”. For example, some performances could be recorded and distributed to a greater audience in Greece and abroad, although this appears to be difficult as it could only take place under specific conditions, so as to avoid online piracy and other related issues.

Regarding **digital skills**, the stakeholders stressed that, in general, creative and cultural entrepreneurs are not familiar with new technologies and the opportunities that these technologies may offer to their businesses. On the other hand, it was mentioned that many companies do not know how to promote and market their products and services through the use of internet tools and the social media. Furthermore, it was also suggested that some sectors need support so that their access to new technologies is facilitated (e.g. rent 3D printers for some hours per week). Finally, stakeholders supported that digital skills related to the understanding and use of new technologies are fundamental to specific sectors such as the music industry and especially to firms offering and delivering their services through online music platforms.

As far as the **intellectual property protection skills** are concerned, all stakeholders suggested that there is a lack of understanding of legislation about intellectual property (patents, industrial design, trademark, copyrights) for protection against piracy and stressed the need for acquiring more knowledge in dealing with illegal downloading and copyright infringement.

Regarding **non-technical or soft skills**, stakeholders mentioned that their academic education was purely theoretical and did not offer substantial opportunities for developing soft skills such negotiation skills, flexibility and adaptability skills and so on.

They also stressed that entrepreneurs or freelancers in the cultural and creative sector acquire horizontal skills mainly on the job, through learning by doing or by using their informal personal networks as academic education in creative and cultural subject does not offer such skills.

Most stakeholders stressed the **need for the certification of skills** in the cultural and creative sector. In addition they suggested the need to link several industries with school curriculum. For example, the stakeholder representing the theatre industry highlighted the need to familiarize school pupils with theater studies and concepts. However, she also underlined that school teachers should first be educated themselves on how to teach about acting. As far as training programmes are concerned she suggested that actors need to experience teaching in person, nevertheless, she implied that some skills can also be obtained through e-learning practices.

In general, it also was also stated by all stakeholders that when mapping the needs for skills in the cultural and creative sector, one has to take into consideration the current economic climate. It was mentioned that according to Eurostat, employment in the creative industries in Greece has decreased by approximately 30% in the last few years. More specifically, due to the persisting economic crisis, many companies had to lay off

staff. These unemployed professionals turned to other forms of employment, such as freelancing and working without social security. As a result, it is difficult to map employment and professional skills in creative sectors. On the other hand, all stakeholders underlined the fact that in these sectors there is a huge difficulty in securing external funding. They suggested that governmental institutions and relevant ministries should provide more funding opportunities and support to the cultural and creative industries stressing that a detailed mapping of the sector should take place along with a mapping of employment. In addition they indicated that creative entrepreneurs should be able to contact and cooperate with financial consultants in order to submit solid proposals to banks and other institutions to leverage funding. In addition, they highlighted the need for the establishment of an institution that supports and provides guidance to creative professionals and businesses to submit integrated applications/proposals to diverse national and EU funding programs. Finally, they concluded that it is important to support these fields, as they are export oriented, and their growth is bound to facilitate the whole country's growth.

Spain

A qualitative research that included on-site visits, observations and individual semi-structured interviews was conducted.

The stakeholders underlined that within the last decade, the role of the Creative Industries has grown to become an important part of the economic system. During the last decade experts and professionals have been publishing statistical data that prove the existence of a productive, valuable and powerful sector that is made up –mainly- of cultural and creative activities and resources. In this way, the huge potential of culture as a driving force for development has been shown in numerous publications, forums and meetings.

Despite the 'creative industries' are very diverse, spanning a range of interlocking industries, in order to meet the demands of professional development of entrepreneurs in the creative sector, both creative, digital and business competence development is needed.

Creativity is the life blood of the cultural and creative sector, just as profit is the life blood of business. Creativity, though is not just in the art or craft itself, but applies to the way in which it is communicated and made available for others to enjoy. The advantage that artists and craftspeople have is that creativity 'goes with the territory'. Once they appreciate that they can apply the same creative energy to making their work available to others, they can very often come up with innovative ways of commercializing. In this sense the creativity is a core process allowing organizations to generate innovation and an added value in processes, products, services and experience.

Other than this, **bringing entrepreneurial skills to the creative sector**—whether plastic, performance, visual, language, or physical—requires a special kind of business sensitivity. A similar sensitivity has to be shown by industry and regional local government towards the unique and mutually beneficial opportunity that the creative economy offers.

Of course each branch of the cultural and creative sector practices entrepreneurial skills to a lesser or greater extent. Anyway the main entrepreneurial competences needed in the creative economy are:

- accessing the impulsion to express the art;
- knowing the main concepts for managing an organization;
- applying the principles and the marketing strategy in cultural and creative sector;
- understanding how the audience/clients will access the work;
- planning the process of creation and delivery;
- setting up milestones to monitor progress;
- defining financial needs and goals.

The need of more specific entrepreneurial training for the creation and consolidation of companies in the creative and cultural sector was underlined. Most businessmen in this sector have technical training in their area, but the lack of entrepreneurial training prevents them from creating competitive businesses, and leads to a panorama with few large companies and lots of small companies and freelance workers. That is, the cross-cutting competences in the sector are poorly defined and the needs for vocational training for the workers in the sector are numerous and growing, in view of the increasing uncertainty in the business world and the prevailing high level of competition. Some stakeholders underlined that they are faced with talented professionals who decide to become self-employed as a necessity, when they ought to become entrepreneurs through opportunity.

Other than this the stakeholders highlighted the importance of the **digital skills** because technological change are seen as the key driver of changing skills needs in the creative sector over the coming years.

The increasing acceleration of new developments in media and ICT technologies greatly affected the Creative Industries' dynamic with a direct impact on the people working in this sector, which is itself an innovator of technological change, and is also subject to broader trends that influence the sector's work and the types of skills it needs.

Taking the aforementioned shortcomings and needs as a starting point, the fusion of innovative concepts that seem to be cross-cutting needs to be stressed in this sector. In Spain there's a trend towards applying **participative mechanisms and the active involvement of society**, especially in processes to prepare policies to boost the creative economy that are better supported and locally led. At the same time some researches, studies and reports in the sector show that there are some basic success factors, which range from developing local capacities to the self-management of assets by the local residents, and also including the provision of trans-national connections and flows. And all this is being defined based on the fusion of two concepts that were always considered to be incompatible: **economy and creativity**.

8. New pedagogical trends and methodologies related to the training or the creation of the CCS transversal competences

There is a growing consensus about the facts that Creative industries require a positive and innovative approach on education and learning with the consequence of the creation of innovative skills and contribution to adapt the actual scheme to an innovative context. In addition to strong technical skills, many authors underline how creative industries requires not only transversal competences such as critical thinking, problem solving, communication and collaboration and self-promotion using the social network, but they need also innovative approaches in term of learning and didactic strategies.

The mapping realised in the three involved countries shows that the academic and not academic words try to move in this direction, but the way to be run is still very long, and experimentation of new strategies in particular those in coordination with the companies involved in the field is still at its primary phase.

In this context, education systems have to equip students with the skills required for innovation and creative sectors, and some countries take this agenda very seriously, others seems to be less equipped.

This approach meets the more general problems of the development of creativity in the school system.

A recent OECD working paper, “Progression in student creativity in school”, reveals how assessment helps specify and clarify what creativity really means, especially as there are many different views about what it is. A prototype tool for assessing pupils’ creativity in school maps the dispositions of creative habits of minds along 5 dimensions: inquisitive; persistent; imaginative; collaborative; disciplined (each dimension including 3 sub-dispositions). The findings of two field trials in English schools show that the assessment tool led teachers to be more precise and confident in developing their pupils’ creativity, and learners to be better able to understand what creativity entails and to record evidence of their progress.

People working in the creative industries are role models for innovation in society, along with scientists and entrepreneurs, and thus it is not surprising that many see this specific trend on education as a means of developing critical skills for innovation.

In a new OECD report, *Art for Art’s Sake? The Impact of Arts Education*, (http://www.oecd-ilibrary.org/education/art-for-art-s-sake_9789264180789-en) the idea of creating new didactic approaches for fostering skills such as critical and creative thinking, motivation, self-confidence, and the ability to communicate and cooperate effectively is assessed. The book also examines whether creativity in education has an impact on learning non-arts disciplines: reading, mathematics and science.

The creative industries need new competences with special reference to the creation of transversal skills and this requires a final overtaking of the pre-technology education context, in which the teacher is the sender or the source, the educational material is the information or message, and the student is the receiver of the

information. In terms of the delivery medium, the educator can deliver the message via the “chalk-and-talk” method and overhead projector (OHP) transparencies. This directed instruction model has its foundations embedded in the behavioural learning perspective (Skinner, 1938) and it is a popular technique, which has been used for decades as an educational strategy in all institutions of learning.

In the Countries involved, the mapping reports in a quite evident manner that the controls over the instructional process is more and more replaced by the emphasis given to the factual knowledge

That implies some other perspectives in educational systems in the way of creating a didactic “ad hoc” for targeting the goals represented by the new competences.

In Italy an approach is becoming more and more popular even in the University and VET context related to what is defined as mentoring as a one to one relation between an experienced mentor in the cultural sector and a mentee who wishes to reflect on their professional career, self-evaluate their balance of competences, identify and bridge gaps, update and increase motivation. Mentoring, as a process of informal transmission not only of knowledge but also of values, represents an informal learning approach relevant to work, career and professional development in the cultural and creative sector. Amongst the most relevant characteristics of the mentoring programme launched in Italy are the developmental and empowering approach related to the identification and nurturing of the potential of the person as a whole. It is based on enhancing what a person possesses and not what it is lacking. By developing and setting their own learning objectives together with the mentor, the mentee owns the goals and the process. The mentor helps the mentee to develop insight and understanding through intrinsic observation. The mentoring programme has now the aim to foster the knowledge, skills and attributes linked to the entrepreneurship competence and creativity that will give the mentee an advantage in a very competitive market such as the cultural labour market. In the Italian cultural and creative sectors, the mentoring approach is expected to enhance the potentialities in term of transversal competences. Mentors in the creative education are expected to help mentee to encourage a more entrepreneurial mind-set by starting to develop their competency profile, to bridge skills gaps, to guide in career options, to encourage networking, risk taking, creative thinking and help to create their own project, if needed. What can appear quite problematic is extending mentoring as a “normal” teaching practise at the educative institutional level. The mentoring approach needs to involve in the educative process and in the formal learning the companies potentially interested in using the competences once created.

Another innovation registered in Italy is represented by the diffusion of the Action Learning. This technique is a group coaching activity particularly suited to supporting people to change and develop their personal approach in the workplace and to build crucial self-awareness.

It addresses the need for “soft” skills, or personal leadership qualities. It encourages learning through consideration of live, real situations and is complementary to an action-based assignment. Action learning

requires a rigorous process and it is proposed that techniques-sharing is required as part of both the training-the-trainers and intensive pilot training programmes.

In Greece what is emerging are the relevance of the Business skills, such as planning, finance and marketing, along with access to advice and support, are needed for the development of sustainable businesses and growth in the cultural and creative industries. These industries tend to focus on short-term horizons and can be reactive rather than proactive, for example when looking at new business models. In addition, linked to this is a need to 'professionalise', particularly expressed by some sectors such as design and craft. Thus, business knowledge in creative courses appears to be an important prerequisite for the development of high potential entrepreneurship in the creative and cultural sector. The development of modules, tools and material to include business skills in creative courses should be enhanced perhaps through a central recourse that could support lectures in creative and arts subjects by wrapping business skills around the teaching of each discipline.

The policy related to the *Continuing Professional Development of workers and artist (or craftsmen)* is very relevant either. Taking into consideration that creative and cultural industries are dominated by micro and small businesses, self-employed and freelancers, time and costs are barriers to training and development. The industries are graduate-rich, but the rate of change in technology and business requires that creative and business skills be continually developed for competitive advantage.

Specific actions aiming to support professional development in different sectors should be developed. An example is the UK Design Skills Alliance. This is a UK-wide (in 20 different regions) knowledge sharing network with a focus on helping design organisations grow and flourish as well as helping designers develop their skills and promote the value of design. The Design industry needs to improve links with industry and education for training and development to meet the challenges of a global industry. It must also invest more in skills and continuous professional development. The Alliance brings together industry, education and government to achieve this. For instance, the key partner for the Alliance in Scotland is The Lighthouse, Scotland's Centre for Architecture, Design and the City. Actions include; design mark in schools, teacher placements in industry, visiting design 'professors' into Further Education (FE) and Higher Education Institutes (HEIs), professional practice framework, directory and continuing professional development for design industry practitioners.

The industry_Creative Apprenticeships is relevant in all the three countries. People coming into the cultural and creative sector lack knowledge about the skills needed to succeed in these industries. Career pathways are unclear or do not exist and often one needs to work as a volunteer basis. This obviously excludes people who cannot support themselves. In Greece there are no employer-led e apprenticeship programmes for the creative and cultural industries. Creative apprenticeships supported by government and other non-governmental organizations and industry associations could provide high-quality, paid, work-based

qualifications in technical and specialist skills areas where employers have identified current and future needs. The apprenticeship would also widen entry to the workforce and address workforce diversity.

As mentioned before in all the Countries also the problem of Creativity and culture in schools is felt as very strategic.

In Greece and in Spain teaching creativity in School is part of the wider creative and cultural agenda expressing concern for the development of creative skills and cultural understanding. The way in which the curriculum addresses the value placed on creativity and culture in schools, the quality of teaching, curriculum design and advice are all seen as having a key impact, both on the quality of development of young people's skills in relation to their further education, and to the cultural and creative industry demands. This agenda can be taken forward by involving major actors either from the cultural heritage sector (such as museum galleries) or the creative industries and support teacher exchanges into industry. In Italy this agenda is part of the new reform process known as "la Buona Scuola" (the Good School) launched by the government and just approved. In this process of institutional reform the debate about creativity is just mentioned and it is not at the centre of the concern of the reform goals. (https://labuonascuola.gov.it/index_en/)

In general in the three Countries the reports show how there is a lack of high-quality, industry-endorsed information regarding the skills needed to enter the cultural and creative industries and develop careers, the range of occupations, and career progression. For employers and practitioners, there is a need for information on training, development, business advice and support.

A web based, industry endorsed source of information and intelligence which could provide user-focused and development information, quality-assured information on training and education, online learning and industry intelligence would probably be of some value exploiting the potential of social media for training and skills relevant to individuals and creative businesses (for a similar initiative see www.creative-choices.co.uk).

All the National reports affirm how the ArtS project can be considered as a first step that enables the identification of current and future skills needs and details of education provision in the Cultural and Creative sector. However, the national and EU research agenda should sustain and develop this work and assess the impact of skills development on productivity, service improvement, and innovation in the creative and cultural industries in the long run.

9. Best practices in Education and Training for the CCS

During the discussion about how to define and describe the "Best practises", the Partners institutions were invited to have clear in mind a common definition of the terms used in the literature to refer to Best practise. They include, above all, the terms "best practice", "good practice" and "smart practices".

Those terms are sometimes used with the same aim and meaning but not always they can be referred to same concepts. The matters are even more complicated by the fact that various disciplines apply the terms differently or in different contexts. For example, we stresses that it can be considered as a Best Practice "a new way of thinking, once clearly oriented on contribute to constant learning, feedback and reflection of what it is positive in term of added value" (Montesca, Arts meeting in Athens 2015). The definition of good practices "emphasizes function and orientation on process, transformation and innovation (Tuominen, Koskinen-Ollonqvist, and Rouvinen-Wilenius 2004, 7, 27).

In practises related to the inclusion of new ideas in the EU labour market in this specific sector related to the creative industries and in training initiatives addressed to the creation of new competences in this areas, the primary goal of BP is to improve the access of creative people in the creative industries by adopting certain principles of the working of another experience that appears successful.

The Greek, Italian and Spanish reports took into account that a Best Practice is really BEST when:

- consider the opinion of relevant stakeholders
- deliver consistent outcomes
- minimize resources, maximize results

The national reports contain a description of Best practices in the area of:

- development and reinforcement of adaptive competence
- new training approaches
- new strategy for the inclusion of the professional profiles of the CCS sectors in the labour market

The following practices are the result of the researches in all the three countries.

Greece

Some best practices incorporating new training approaches and strengthening of various types of skills and competences in the cultural and creative sector in Greece were identified through desk research:

Gi-cluster <http://gi-cluster.gr/en/>

gi-Cluster, established early in 2012, is a creative industries cluster with a focus on Gaming and Creative Technologies & Applications, aiming at becoming a fully functional innovation and business ecosystem with substantial international market share, capable of supporting viable industry growth and competitiveness, while contributing towards elevating Greece in the global competitiveness chart.

gi-cluster is a member of the New European Media Network (NEM) a constituency which includes all major European organisations working in the networked and electronic media area, including content providers, creative industries, broadcasters, network equipment manufacturers, network operators and service providers, academia, standardisation bodies and government institutions.

DIMITRA ITD www.dimitra.gr

DIMITRA ITD participates in **ON.S.C.E.N.E. - Organizing New Skills for Creative Enterprises and Networks in Europe** (<http://www.onscene.eu/en/>). ON.S.C.E.N.E. is a two-year project aiming to promote professions related to scenography and stagecraft in four European countries: Italy, Spain, UK and Greece.

In order to meet these aims, the partnership is working together to:

- ✓ Identify the outstanding aspects of the cultural and technological evolution of scenography and stagecraft;
- ✓ Design and develop common training and learning pathways through competency-based unit models focusing on labour market needs;
- ✓ Improve on-the-job learning and work experiences enhancing creativity, lateral thinking and entrepreneurial spirit;
- ✓ Enhance an active collaboration between universities and the creative and cultural industries, involving local communities and institutions, developing pilot experiences for 'creative factories' focused on scenography and stagecraft professions.

University of the Aegean - Department of Cultural Technology and Communication

<http://www.ct.aegean.gr/metaptyxiakes-spoudes/msc>

The aim of the postgraduate programme offered by the Department of Cultural Technology and Communication in "Cultural Informatics and Communication" is the training of highly skilled scientists and researchers in computer applications in the field of culture in general and museology in particular.

The main objectives are:

- ✓ The promotion of scientific knowledge and research in cultural informatics;
- ✓ The development of new research directions in the field of IT;
- ✓ The provision of high-level graduate education in national sensitive areas for policy culture;
- ✓ The alignment of the provided knowledge with the recording and promotion needs of the cultural heritage;
- ✓ The contribution to development, economic and technological policy of the country, as shaped in the information society modern context;
- ✓ The development of links between the provided knowledge and the international developments in the relevant sciences, research directions and specialties.

"Poli Dromena-Development and Utilization of Cultural Capabilities in the Municipality of Aigaleo" project

<http://www.polidromena.gr>

The goal of the project is the proper preparation, support and labor market integration of 78 unemployed, young scientists and people insured by agricultural activities with low incomes, to either create their own Social Cooperative or personal business, or be absorbed in existing enterprises.

The professional-business activation of these target groups will become part of a sustainable development plan of the area (Municipality of Aigaleo) which focuses on the exploitation and development of the unique cultural resources of modern and ancient cultural heritage, attracting visitors and strengthening the growth of all sectors of productive activity in the region.

The project's aim is the reconnection of events already being held on a regular basis with the cultural characteristics that make up the unique cultural identity of the area and the organization of new events that meet the cultural terms (history, locality, cultural continuity) and social purposes (collectivity, participation, creativity) that they are called to serve.

The cultural event planning business will revive local cultural characteristics, enhancing the attractiveness and visiting of the region and will be able to incorporate the stands of sale of local products in cultural events of other municipalities in the wider area of Athens and Greece.

Vocational Training Centre KEK GSEVEE <http://www.kekgsevee.gr/ourobjectives>

The Vocational Training Centre KEK GSEVEE was founded in 1995 on the initiative of the Hellenic Confederation of Professionals, Craftsmen & Merchants (GSEVEE), as a non-profit educational company. It is an educational, nationwide, centre certified by the National Accreditation Centre for Continuing Vocational Training.

KEK GSEVEE is based in Athens having branches in Thessaloniki, Ioannina, Larissa, Patra and Heraklion (Crete). The main aim of KEK GSEVEE's work it is tackling the raising needs of employers and employees in Greek small and medium-sized enterprises for lifelong learning, education and vocational training.

It implements programs with the following thematic training objects:

- ✓ Exiting the crisis: Technical assistance in running the business and overcome the crisis and the negative economic cycle - The running of the business environment in the Economic Crisis
- ✓ Exit from the crisis: Green entrepreneurship - Corporate Social Responsibility (CSR) - Social Economy
- ✓ Exit from the crisis: Sectoral formations – clusters
- ✓ Organisation and small and microenterprise function - "Business to Business"
- ✓ Organisation and small and microenterprise function - Liabilities to Public Agencies / Organizations and third parties
- ✓ Investigate alternative suppliers, smart markets and trading
- ✓ Logistics management (logistics management)
- ✓ General economic education
- ✓ Organisational skills
- ✓ Ability to communicate
- ✓ Conflict management ability

National and Kapodistrian University of Athens <http://elearn.elke.uoa.gr>**-e-learning** training programs

The training programs have been designed exclusively for distance learning for people of all ages and include business management, marketing, business English etc.

For those who attend e-learning programs live consulting is offered in co-operation with EDU JOB (<http://www.edujob.gr>).

Hellenic Confederation of Commerce and Entrepreneurship (NCHC) <http://www.esee.gr>

The NCHC operates its own nationally accredited training center (KAELE) offering vocational training services to working people, self-employed and unemployed persons who wish to work in the commercial sector.

KAELE's main goal is to cover the educational needs connected with the modernization and development of Greek commercial enterprises. In order to achieve this goal KAELE executes training programs addressed to self-employed persons, employees as well to unemployed persons who wish to work in the commerce sector.

Innovathens <http://www.innovathens.gr>

INNOVATHENS is an integrated node of Innovation and Entrepreneurship, where one can meet experienced market executives and academia, as well as successful entrepreneurs that will help in a practical way to mature his/her business idea and develop or transform his/her business. In addition, one can have free access to specialist expertise, information and advice in the areas of his/her interest and explore alternative vocational rehabilitation avenues.

More specifically INNOVATHENS offers the opportunity to would be entrepreneurs to:

- ✓ participate in lectures, seminars and workshops aiming at the development of specialized techniques and other skills necessary for the creation and successful operation of an innovative company
- ✓ network with entrepreneurs, researchers, academics and creative people with common interests
- ✓ get tips from Business Associations representing innovative companies of the city
- ✓ receive information on business opportunities created in the city innovation ecosystem
- ✓ follow presentations of best practices and standards of business examples
- ✓ take part in competitions and Innovation Festivals

Onassis Cultural Centre <http://www.sgt.gr/en/>

The Onassis Cultural Centre is Athens' new cultural space hosting events and actions across the whole spectrum of the arts from theatre, dance, music, cinema and the visual arts to the written word, with an emphasis on contemporary cultural expression, on supporting Greek artists, on cultivating international collaborations and on educating children and people of all ages through life-long learning.

The educational programmes and actions that complement the Centre's programme of events seek to cultivate a more informed public increasingly open to new directions in the arts. This goal will be achieved by means of continuing education which seeks to familiarize children and adults with key concepts in contemporary arts and to keep them up-to-date with the salient issues of our times.

The wide range of arts on offer at the Onassis Cultural Centre, and the synthesizing approach that this can foster, is well worth exploring in their educational programmes, too. Consequently, the visual arts, theatre, dance and music will all be approached via educational programmes arranged thematically within a single art-form, but also inter thematically to foster a dialogue between the arts. More specifically, in their education programmes for adults include a number of parallel events including **pre- and after-performance talks**, and **workshops-seminars**.

Athens School of Fine Arts <http://www.asfa.gr>

The Athens School of Fine Arts has evolved from a small nucleus established in 1837 known either as the Polytechnic or the School for the Arts. In 1843 the School for the Arts was organised into three divisions under a single director:

- ✓ **First:** a part-time school providing supplementary education to craftsmen
- ✓ **Second:** a full-time school for young people intending to work as industrial craftsmen
- ✓ **Third:** a full-time higher educational school for teaching the fine arts

Master in Digital Arts

Since 1998 the Athens School of Fine Arts has been offering a Digital Art programme, a two-year postgraduate programme that encourages modern artistic and technological research into new digital forms of art. It leads to an M.A. Degree in Digital Arts.

Master in Fine Arts

Since 2004 the Athens School of Fine Arts has been offering a two-year Master's Programme in Fine Arts. The Master Programme aims at specialization in visual and fine arts, art theory and aesthetics. In addition to the studio work that is the backbone of the programme, the students attend seminars, lectures, and meetings with distinguished artists from Greece and abroad.

ST-ART APP project <http://www.start-app.eu/>

The ST-ART APP project seek to develop skills and enhance self employability by creating connections between VET, educational institutes and the labour market involving transnational partners (public and private vocational training institutes, SMEs and Organizations active in the support for self employability) in the sector of Creative Enterprises and Cultural Assets and Heritage. The project Consortium composed by Partners from 7 EU Countries (Italy, Greece, England, Denmark, Hungary, Portugal, Croatia) aims at providing youngsters and creative entrepreneurs with tools that will allow them to start up or grow their business in the Creative and Cultural Sector. Direct beneficiaries will acquire transversal capabilities and skills such as

critical thinking, creativity, sense of initiative, problem solving, risk assessment, decision-making and constructive management of feelings.

The long term impact of this project is to promote the self-employability culture, increasing in the meantime the internationalisation of the providers of VET, developing a true example of interactive and effective didactic tool for indirect beneficiaries, trainers of VET.

The Digital Culture programme <http://digicult.aegean.gr/>

The Departments of Product and Systems Design and Cultural Technology and Communication of the University of the Aegean, and the Schools of Fine Arts of Athens and the Aristotle University co-organize (in Syros, Mytilini, Athens and Thessaloniki) intensive workshops aiming at the upgrading of competences and knowledge of Fine and Applied Arts graduates. The main project's objective is to familiarize graduates with contemporary artistic research combined with technological research towards the wider fields of art and culture. More specifically, it aims at the implementation and consolidation of modern forms of Art as well as the development of technical skills such as creative digital design skills.

MSc program for graphic arts and multimedia of HELLENIC OPEN UNIVERSITY

<http://www.eap.gr/gtp.php>

The aim of the course is to provide expertise in the field of Graphic Arts - Multimedia. Specifically, the program aims to offer students the opportunity to cultivate their creativity and acquire skills in visual communication using various media (e.g. printed and/or electronic material, video etc.).

BIOS ROMANTSO <http://www.romantso.gr>

Romantso, the former printing plant of the infamous "Romantso" magazine, is situated in the historical center of Athens and functions both as an incubator for start-up companies within the creative industry and as a cultural center, organizing and hosting a variety of, accessible to the wider public, events, on a daily basis.

Romantso's incubator offers office spaces for rent and a variety of services, targeted to start-up companies within the creative sector. The building has already been developed into a vibrant meeting point for young creatives that provides both private and co-working spaces. The incubator offers secretarial and communication services, in the same time that members have access to the exhibition space, the photographic studio and the meeting room of the building, covering an important part of the functional and promotional needs of a young company.

Romantso's cultural center organizes and hosts music performances, art exhibitions, theatre, seminars, workshops, presentations and lectures accessible to the wider public. Its purpose is to reactivate an abandoned part of the historical center of the city, where some years ago, the creative core of urban life was based.

Romantso's people and the cultural center's programming are both important in forming the building's character and its everyday life. Young artists are hosted, on a frequent basis, inviting their circles and the wider public to experience vivid art events of all kinds. The café, the exhibition space and the concerts/theatre stage, are accessible to everyone in order to present new ideas, new projects and new media to be developed.

The cultural center functions on a daily basis presenting a variety of activities for and from the city's people and the incubator's members, offering a wide range of events related to urban life, music, performances, visual arts, food, discussions, presentations and exhibitions.

Visitors and members of Romantso's incubator can participate in the cultural center's activities or just relax and socialize with friends and colleagues at the cafe. A vibrant venue of artistic creation is welcoming and involving the wider public in an open dialogue, aiming to influence the Athenian arts scene.

FAB LAB ATHENS <http://fablabathens.gr>

FAB LAB ATHENS is an active node of the Digital Fabrication Laboratories network Fab Labs that are a platform for cooperation between people and organizations from different countries around the world.

FAB LAB ATHENS explores how Digital Fabrication, Information and Communication Technologies applied in different disciplines can create more efficient economic, social, productive and education models in the different local contexts of the region of Greece as well as outside Greece.

FAB LAB ATHENS objectives are:

- ✓ to test and promote new economic, social and educational models in the local context of Greece and in the global scenario of the 3rd Industrial Revolution and the crisis societies
- ✓ to organize activities, research and educational programs related with Science fields of production, designing and communication (New Materialities/Internet of Things,/Automated Construction/Real time Data/Smart Cities/The Science of DIY/Collective Innovation/Open Source Design and more)
- ✓ to create an Open Lab that is accessible to local people, professionals, researchers, students, children and to anybody interested in learning and testing the uses and applications of digital fabrication technologies.

Athens University of Economics and Business, e-DigiMa project <http://digima.gr/e-digima>

DigiMa is a new educational program in digital marketing and social networks which is offered by the Vocational Training Centre of the Athens University of Economics and Business.

More specifically, e-DigiMa offers education through e-learning aiming towards the understanding of digital media and tools and their effective exploitation opportunities within the marketing objectives of a company or an organization.

The e-DigiMa is aimed at a wide range of professionals and students who want to gain knowledge in digital media, tools and strategies of marketing.

Target group of e-DigiMa:

- ✓ Graduates and students of universities and technical colleges
- ✓ Professionals who work or wish to work in a position relative to the object of the program
- ✓ Secondary Education graduates who wish to acquire relevant knowledge
- ✓ Executives or professionals working in marketing and sales, people with technological background dealing with digital technologies
- ✓ Current or future entrepreneurs working or wishing to do business online

Potential benefits

- ✓ Understanding and ability to use the digital environment and the opportunities arising from its full exploitation
- ✓ Ability to make an integrated e-marketing plan that will exploit all new means of communication and sales channels (omni-channel approach)
- ✓ Understanding of digital marketing methods and tools (content, Search Engine Marketing, Display advertising, social networks, mobile)
- ✓ Ability to combine digital marketing tools
- ✓ Ability to monitor the effectiveness of digital marketing actions

International Hellenic University Lifelong Learning Programs

<http://www.ihu.edu.gr/index.php/llps.html>

The International Hellenic University offers Lifelong Learning Programs with the aim to provide individuals at all stages of their lives with the opportunity to participate in stimulating learning experiences or update their educational level on prior knowledge.

IHU offers a number of high-quality, self-funded educational programs. In the period 2014 – 2015 the programs offered are:

Programs in English:

- ✓ Summer School in Ancient Technology and Crafts
- ✓ Summer School in Nationalism, Religion and Violence
- ✓ McGill Summer Studies in Greece

Programs in Greek:

- ✓ Spring School - Your Portfolio: Your Ticket to Success
- ✓ Spring School: From the idea to the business
- ✓ Winter School: Product design with digital tools: From design to photorealistic illustration
- ✓ Product Design Summer Camp 2015

University of Athens, Kostis Palamas project <http://kostispalamas.uoa.gr/>

The promotion, dissemination and exploitation of Greek culture and tourism can be facilitated through the tools offered by communication studies in their broadest sense. This project's objective is to provide knowledge and skills related to communication and the Greek culture aiming at its better promotion in the media and in those services and relevant actors dealing with culture and tourism. In addition it seeks to offer a critical view on the cultural pursuits and events in relation to communication studies. The programme aims at professionals originating from the fields of journalism, culture and tourism, as well as those interested in these fields. The seminar courses intend to help professionals acquire skills through which they can combine the capacity for abstract thinking (analysis and synthesis) and the capacity of planning communication actions and skills with the use of information and communication technologies for the promotion of Greek culture and tourism.

British Council Greece <http://www.britishcouncil.gr/programmes/education/skills-entrepreneurship>

The British Council in Greece organizes seminars and various events for the promotion of entrepreneurship and entrepreneurial skills. Their goal is to raise awareness and encourage the exchange of knowledge in order to contribute to changes that bring about global prosperity. This is achieved through the dialogue at a policy level, through a series of international collaborations and through the development of innovative approaches to skills development, and vocational and entrepreneurial education.

Italy

Fil rouge of the best practices chosen is the cross-fertilization between sectors as a mean of development of abilities within the CCS. Three case studies are taken into consideration to underline different approaches, from a more institutional one to the new emerging and horizontal practices.

Cittadellarte-Fondazione Pistoletto <http://www.cittadellarte.it/>

Cittadellarte-Fondazione Pistoletto was instituted in 1998 as a concrete action of the “Progetto Arte” manifesto where the artist Michelangelo Pistoletto proposed a new role for the artist: that of placing art in direct interaction with all the areas of human activity which form society. The aim is to inspire and produce a responsible change in society through ideas and creative projects.

Cittadellarte is a great laboratory, a generator of creative energy that generates unedited processes of development in diverse fields of culture, production, economics and politics.

The activities of Cittadellarte pursue a basic objective: to operationally take artistic interventions into every sector of civil society to contribute responsibly and profitably to address the profound changes of our age.

ArtLab <http://artlab.fitzcarraldo.it/>

Now at the 10th edition, ArtLab is an annual event for cultural professionals, enterprises, government, artists and all interested citizens.

Four days of seminars, panel discussions, workshops, presentations of projects: a unique opportunity to meet colleagues, compare experiences and to network.

It is organized by Fondazione Fitzcarraldo, an independent center working in the fields of management, economics and politics of culture in Italy and in Europe. It is specialized in consulting for the management of cultural organizations and training for operators.

FabLab <http://www.fablabroma.it/on/>

FabLabs are laboratories with several digital manufacturing technologies at disposal to users to create customized products or to improve existing products, adding functionality. In addition, the added value of collaboration and participatory philosophy of open source and open design has great potential to develop new ideas and skills.

FabLabs are present all over Europe, and in Italy there are more than 50 laboratories with the aim to promote the “culture of production” and the “culture of doing”, with particular reference to technological innovation, the dissemination of knowledge and the exchange of practices and processes.

FabLabs are spaces open to all those who want to turn their creative ideas and in unique and innovative products, in the "do it yourself" style.

FabLABs are responsive to the philosophy of experimentation and collaboration that allows to boost manufacturing.

An example for all, in Rome has opened FabLabRoma in 2013, a place of shared planning where members can realize their own project, working directly on the machines or using the support of the staff . It is opened to students for a project, to companies for their prototypes or to individuals with a simple hobby.

Domus Academy – a living laboratory <http://www.domusacademy.com/>

Domus Academy is a living and pulsating laboratory, founded in Milan in 1982. It is an incubator of talents and a springboard for interdisciplinary adventures. And more than anything else, a boost for creative and satisfying careers.

Here, the main protagonist is the student, the one who generates ideas and makes mistakes, from which he learns and thereby invents new models, processes and objects; above all developing, through an unlimited curiosity, a one-of-a-kind future work life.

The school is therefore a concrete human experience, which combines the ability to invent with an accurate, rigorous and robust method.

Domus Academy is synonymous of global excellence in design since 1982.

Within the context of higher education, it makes itself known as a laboratory of research and experimentation, taking its first steps onto a national scene by presenting its unique approach to post-graduate studies within Fashion and Design. In only a matter of years, it becomes acclaimed for its exclusive emphasis on its Italian roots, and thanks to its programming, develops a strong identity on the international stage.

In December 2009 Domus Academy joined Laureate International Universities, an international network which includes more than 80 accredited campus-based and online universities in 29 countries throughout North America, Latin America, Europe, Northern Africa, Asia and the Middle East.

Domus Academy encourages the expressiveness of creative enthusiasts in a multidisciplinary way. It is for those that desire to produce wonder and surprise by designing new and exciting life trajectories, boosting careers as well as inventing new jobs in line with the current market demands.

An opportune network of contacts, and relationships with prestigious firms and companies, all of these are offered by Domus Academy in order to facilitate internship opportunities that can be created for students. Excellent companies are involved also in workshops and work closely with students.

Università degli studi di Bologna - Master in Publishing and Multimedia Print

<http://www.sssub.unibo.it/master/>

The Master in Publishing and Multimedia Print is directed by Umberto Eco.

The Master is a two-year programme, with compulsory attendance, open to 20 graduates from any faculty of a Italian university.

Publishing becomes today, more than once, a tertiary activity in wide expansion. Not only because, as evidenced by the large libraries, the traditional publishing business is on the rise, but also because it is enriched with new forms of multi-media publishing. Also the same book distribution today requires specialized skills, so the graduate bookseller is replacing the traditional salesman.

The Masters in Publishing does not claim to provide the skills necessary to become CEO of a publishing house. However, while offering a global information on the operation of a publishing company, has to provide the specific skills that are required in a young man who is going to this profession.

Centro sperimentale di cinematografia - Experimental Cinematography Centre

<http://www.fondazioneccsc.it/>

The Centro Sperimentale di Cinematografia (Experimental Cinematography Centre) [Foundation](#) is the most important institution in Italy for teaching, research and experimentation in the field of cinematography. Here, "*cinematography*" should be understood in its widest sense, to include film, documentaries, fiction and animation.

The aims of the Centre encompass the development of cinematographic and audiovisual arts and techniques to the highest possible level.

This work is carried out by the two distinct arms of the Foundation:

[The "Scuola Nazionale di Cinema" \(National Film School\)](#)

[The "Cineteca Nazionale" \(National Film Archive\)](#)

The Scuola Nazionale di Cinema (National Film School) has its principal headquarters in Rome and separate centres in Piedmont, Lombardy and Sicily. Its mission is to develop cinematographic art and technical expertise to the highest possible standards, by means of research, experimentation, production and teaching programmes. The school acts as a cultural hot-house, where all kinds of specialists from the world of cinema come together: producers, directors, cameramen, scriptwriters, set-designers, actors, editors, musicians and sound-technicians, as well as experts in digital filming, teachers, students and scholars from all over the world.

The Cineteca Nazionale (National Film Archive) preserves the heritage of Italian cinema (consisting of about 120,000 films, of which 2000 are available for circulation) and concerns itself with the conservation, restoration and enlargement of the archive. It also undertakes the role, both in Italy and abroad, of developing and promoting this national heritage, by agreement with state bodies, institutions and cultural associations, schools and universities.

Practices about the new strategy for the inclusion of the professional profiles of the CCS in the labour market

Ermanno Casoli Foundation <http://fondazionecasoli.org/>

The Ermanno Casoli Foundation was set up in 2007 with the aim of fostering the relationship between the worlds of art and industry by promoting initiatives in which contemporary art becomes an educational and methodological tool that contributes to improving working environments by favoring innovative processes. In all its activities, the Ermanno Casoli Foundation assumes the role of mediator, guaranteeing the artists full autonomy and freedom of expression and the company coherence and compatibility of the initiatives with its own needs and objectives.

The activities promoted by Ermanno Casoli Foundation are based on the firm belief that contemporary art, as thought activator, may contribute to break the traditional paradigms of common knowledge, thus allowing people to become familiar with a state of mind and emotion that may lead to the manifestation of unexpected possibilities.

This makes art the most adequate tool for the creation of open and innovative experiential environments. The foundation promotes projects that mix art and enterprise in order to trigger original processes of innovation, strengthen creativity and therefore social cohesion.

All the activities that the foundation promotes are first tested in Elica, that thus becomes a sort of laboratory where to verify the results of activities that can then be introduced into other contexts.

cheFare cultura e innovazione <http://www.che-fare.com/>

che Fare is a tool to investigate the changes of the present and the roads of the future. It is a space that allows for-profit and non-profit organizations to develop their own making, creating partnerships and activating local networks.

cheFare is an engine designed to seek and to show the projects and the experiences of those who imagines and builds every day new worlds; a program for anyone who creates, provokes and starts moving knowledge. A space for the study, research and practice in the areas of culture participation, peer to peer, collaboration, open source, free culture.

cheFare is a platform that recognizes the social impact, reporting and telling cultural projects with a high degree of innovation.

Bic Lazio <http://www.biclazio.it/>

BIC Lazio supports the development of the region through the creation of new businesses and the expansion of existing ones. Thanks to its long experience and extensive presence throughout the region, is able to listen to the demands of the local economy and to transfer them to those who want to start new businesses.

The aim is to ensure aspiring operators real opportunities for success. BIC Lazio works in close collaboration with the public institutions and with the business community.

The mission of BIC Lazio is:

- To spread the corporate culture, as a tool for economic and social growth of the territory.
- To channel, through entrepreneurship, all the human and professional resources available. Starting with the disadvantaged people (immigrants, the disabled), expelled or threatened with expulsion (laid off, people on the move) or vulnerable (young people, women) in the labor market.
- Encourage innovative business initiatives, technology development of the entire regional manufacturing.
- Encourage collaboration between enterprises (networks / chains) and between territories, in order to strengthen competitiveness and support the emergence of a middle class business.
- Promoting entrepreneurial initiatives related to local development processes, enhancing the artistic and cultural heritage and local products (food, artistic handicraft), redeveloping the tourist offer.

BIC Lazio was established by the Regional Law 35/90.

Spain

There is a broad range of cross-cutting courses available in continuous and occupational training. Standout courses include, among others, a course offered by the Infyde foundation on “setting up and consolidating cultural and creative industry enterprises”. This course provides an overview of the various functional areas of an enterprise, with a view to spotting market opportunities and developing business plans/improvement plans.

U-TAD University

U-TAD: The U-TAD university is the first in Spain to be exclusively devoted to training professionals from the technological and digital art industries and aims to meet the current demand for specialised training for the production of digital contents.

Pepe School Land

Pepe School Land: The Pepe School Land training school, located in Barcelona, was set up in 2006 and is one of the benchmarks in teaching animation in Spain. It focuses on offering a Course on Modelling, 3D Animation and Narrative through an annual course for only 20 students, in which they learn how to work in an animation studio in personalised classes from its director, Daniel Martínez Lara,. The artistic side, rather than technical aspects, is extremely important, as the aim is to train an animator who will be able to use any kind of tools, an aspect that is quite exceptional. They try to motivate students, and to instil in them a sense of personal responsibility with regard to studying animation.

ArtLab Huesca

Art Lab Huesca is a multimedia laboratory that forms part of the Culture Department of Huesca Town hall for the development of artistic projects linked to new technologies. It has three working areas: Music, Audiovisuals and Multimedia Design, that are coordinated by active artists and professionals in each of these fields. The Art Lab provides practical training, guidance for creative projects, rehearsal rooms, the hiring of audiovisual equipment and use of programmes and equipment for up-and-coming artists and collectives whose chances of starting a professional career on finishing official training would otherwise be cut short

Creativity Zentrum

Creativity Zentrum Bilbao was founded in 2007 as a pioneering initiative for training quality professionals in all these fields; this is all about setting up a centre for high levels of creative achievement. The centre has gone to great lengths to be able to count on international benchmarks in creative training who pass on their knowledge to the local creative context.

Course in the Creation and Consolidation of cultural and creative industry Companies

The basic **aim** of the course is to provide an overall vision of the different functional areas of the company so as to be able to determine market opportunities and develop the Company Plan/ Improvement Plan; always making use of management tools to help its implementation.

Promoting a new business is not just an intuitive process, inspired by merely observing changes in the surroundings. It should combine abundant mounts of intuition, enthusiasm and decisiveness, as well as sufficient technical, financial and management capacity for what is to be undertaken and/or consolidated, and a certain dosage of study and planning, in order to reduce possible levels of uncertainty.

As **specific aims** this programme hopes to:

- Provide personalised guidance for each of those taking part, for both current and potential entrepreneurs in cultural industries, regarding the opportunities in their respective active sector and on the development of a business plan.
- Handle the business tools required to design and run cultural projects with well-defined strategic aims.

- Develop abilities to predict the future that make it possible to forecast changes in our society, and make it easier to announce and disseminate projects.
- Understand the cultural processes and trends that are taking place in the world of culture on a national and international level.
- Encourage the development of new technologies in cultural production, paying special attention to digital creations, both in traditional artistic sectors and in those linked to learning and creative leisure (animated films, advertising, communication, web pages, and video games).
- Acquire skills and tools to define aims, cope with challenges, find solutions and assess cultural projects.
- Understand the principles of the cultural market in modern society.
- Get to know the legal and administrative basic concepts in different fields of activity.
- Learn to combine criteria governing social and economic profitability in a balanced way by respecting the special nature of cultural expression, sustainability, the environment and equal opportunities.

Other Best practices are the following:

- ***ENTREPRENEURSHIP***

Practical guide to social and cultural entrepreneurship. University of Salamanca

- ***ENVIRONMENTAL SUSTAINABILITY***

Guide to implementing environmental management systems in cultural enterprises. Regional government of Catalonia [Manual of environmental best practices. Museu Nacional d'Art de Catalunya.](#)

- ***INTELLECTUAL PROPERTY AND COPYRIGHT***

[Fundación Autor manual of best practices, 2012.](#) Fundación Autor.

[Code of best practices for joint management of intellectual property rights, 2011.](#) Instituto Ibercrea.

[Manual of best practices for the prosecution of breaches of intellectual property rights, 2008.](#) Ministry of Culture.

- ***SOCIAL RESPONSIBILITY***

Social Responsibility Policy of the [Museu Nacional d'Art de Catalunya 2013](#)

- **VOLUNTEERING**

[ACT 6/1996 of 15 January on Volunteering](#). BOE (Official Journal)

Standard form contract for volunteering, with accident and civil liability insurance. FEAM (Spanish Federation of Friends of Museums), Foundations

Documents for good governance and sound management practices. AEF (Spanish Association of Foundations) 2012

- **GENERAL**

[Guide to best practices in cultural management](#). Associació de Professionals de la Gestió Cultural de Catalunya

- **VISUAL ARTS**

Recommendations on best practices for visitors. [Museu Nacional d'Art de Catalunya 2014](#)

Document Zero in the contemporary art industry, for best practices at museums and art centres, 2007 of the Ministry of Culture.

10. Recommendations

As already defined in the sections above, the Mapping can be considered as one of the first step towards a very articulated process of studying, analysing and put into action some initiatives in the framework of the arts project. In any case the studies carried out in Spain, Greece and Italy allow enlightening the attentions of policy makers and operators related to the sectors of creative industries.

This list of very first recommendations should drive to a more focused discussion about the real needs in operative, educative and political terms for these specific sectors.

In general term we can say that the fragmentation of the market is one of the common characteristic of the creative industries especially in the analysed countries. Furthermore, the factors of success are more factual in the urban area that leads to concentrate the companies, and consequentially the operators in the biggest cities.

The mapping suggests that we need operate in three directions

School Education: school has to take into serious account the development of creativity since the very early age

In the coming age, creative thinking and problem solving, as well as teamwork, will be key traits for success. These skills are not needed just in the future creative industries but it is possible to assume that the whole education system will need to make a radical transition in most of the EU countries. Researches show that the actual primary and secondary school system is severely lacking in practices necessary to prepare the next generation for the unexpected through creative, strategic thinking.

Training in VET: supporting the next generations stretching their transversal skills and preparing them to the Creative sectors

To have technical skills is more and more not enough for playing a role in the labour market in the sectors related to the creative industries. The practise of the transversal skills should become part of the programs in VET schools

The localization of the creative industries in the urban areas should be balanced by a policy of support in favour of the companies that decide to remain located in marginalized areas, even through the support of the EU funds for the rural development or other found for the regional development

Given the continued high growth potential of the EU's creative economy, its uneven geography is an obvious area of concern to be expressed to policymakers charged with promoting growth across the whole Union. The mapping's results suggest that specific policies should be targeted to develop creative clusters across the EU. In the Countries involved (but also in the others) new funds should be set up using Regional Growth Fund money to grow creative clusters, building on existing local strengths and meeting local needs.

The disposal of good Internet connection is strategic for enhancing the market of the Creative sectors: policies in favour of the Creative sectors should take the availability of the web access into account

In the plans of the digital agenda for Europe the entire EU should have be covered by broadband by 2013. Standard fixed broadband coverage was estimated to cover 95.5 % of homes within the EU, although its share in rural areas was lower at 83.2 %.

The digital agenda foresees that broadband operating at speeds in excess of 30 Mbps by 2020 will cover the entire EU. This target id not yet reached and is quite far its expected performances. This implies a great limitation for the Creative industries.

Policies should be addressed to support the creation of Small companies and spin-off in all the areas involved for promoting localized creative clusters.

The National and local government should promote a institutional framework to support entrepreneurship and access to finance for micro and small enterprises creating specific means for the creative sectors foreseeing a reduction of the administrative procedures to launch a new business in the sectors related to

the creativity and provide tax incentives. The Public Institutions should create specific business services through small businesses support centres favouring the creation of business networks in the related creative sectors.

Promote the awareness and experiences to increase the demand for the jobs in the CCS

Promote the cooperation and 'match making' events in order to increase the reciprocal knowledge and the exchange of experiences. In particular, taking into account that education and training especially in this sectors need the contribution of informal and non-formal learning, also promoting the cross clusteral cooperation.

Support and enhance the professionalism of user communities

Professionals have to evolve, but also consumers have to support a more qualified market. It is important to build up living labs, user communities, test beds and enhance user led innovation based start-ups.

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