

# CULTURAL AND CREATIVE INDUSTRIES IN EUROPE



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**#COCO4CCI**

## CCI: Central tools for economic growth

According to the European Parliament's *Report on a coherent EU policy for cultural and creative industries*, cultural and creative industries (CCI) represent an extensive economic asset and a valuable source for European countries. Cultural and creative Industries are central but underestimated tools for economic growth, representing 11.2% of all private enterprises and 7.5% of all employed people. CCI not only contributes to economic indicators but also for intangible value creation considering their capacity to build bridges between arts, culture, business, and, always more often, with technology.



11,2 %

European average for number of CCI enterprises within the total number of enterprises.

As the EU report also tell us, CCI holds even more potential which could be further exploited. In addition, culture and creative industries find themselves to face a moment of exponential acceleration of change, made of overwhelming challenges as digital transformation, persistent economic instability, and considerable changes in the regulatory European framework. With the continuous evolution of the cultural and creative sectors, there is an increased need to support the expansion and the skills development of professionals employed, as well as to opening new direction and opportunities through transversal innovation.

## Establishing new potential for growth

The *Transnational mapping report - positioning of the regions in Central Europe\** (COCO4CCI) develops the analysis of level of development, the identification of specialization patterns, common challenges, and opportunities of cultural and creative industries within the six partners' countries - Slovenia, Italy, Slovakia, Germany, Austria and Poland. The analysis showed very interesting potential for the growth of the sector, particularly as the main project goal, establishing new partnerships and new market areas with advanced manufacturing sector.

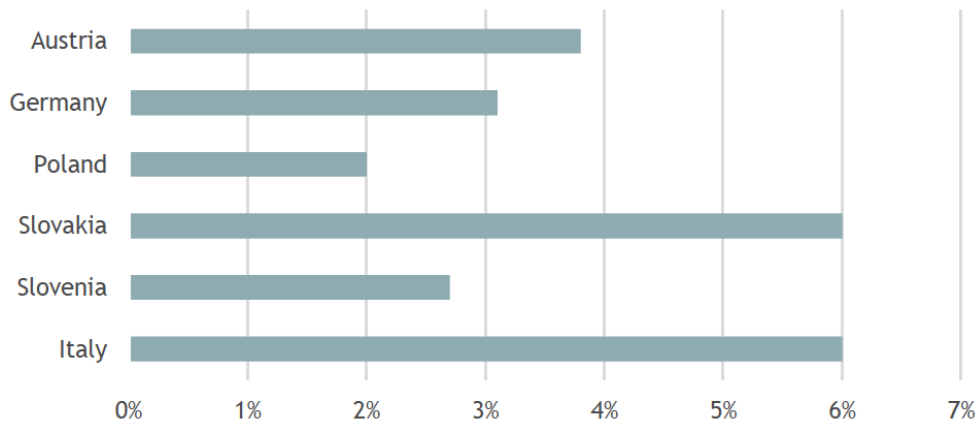
\* The document *Transnational mapping report - positioning of the regions in Central Europe* was prepared in the COCO4CCI project, Interreg Central Europe. Slovenian partners of the project are the Regional Creative Economy Centre (RCKE) that operates under auspices of Regional Development Agency of the Ljubljana urban Region (RRA LUR) and Chamber of Commerce and Industry Slovenia (CCIS).



The economic value generated from the CCI sector in the total national economy is:

- Italy: 92 billion Euro (population: 60.36 million)
- Slovenia: 2,96 billion Euro (population: 2.08 million)
- Slovakia: 5,7 billion Euro (population: 5.45 million)
- Poland: 10,48 billion Euro (population: 37.97 million)
- Germany: 158,6 billion Euro (population: 83.02 million)
- Austria: 22 billion Euro (population: 8.85 million)

It is interesting to underline that even if there seem to be a large difference in the value created by the CCI sector of 6 countries, they decrease substantially when reported to the “relative value” data, referred to the weight of CCI within each total economy.



The final transnational overview of the main economic data related to the CCI in Italy, Slovenia, Slovakia, Poland, Germany, and Austria indicates that this sector has an important role within the national economies.

The economic value of the CCI in terms of the total GDP among the six partners' national economies is 5%, which is perfectly aligned with the European average i.e. 5.3%, as reported by aforementioned European Parliament's report on EU policy for cultural and creative industries. As it will be also presented later, in some projects partners' countries, the CCI sector is facing an annual important growth process revealing new CCI trends and potentials.

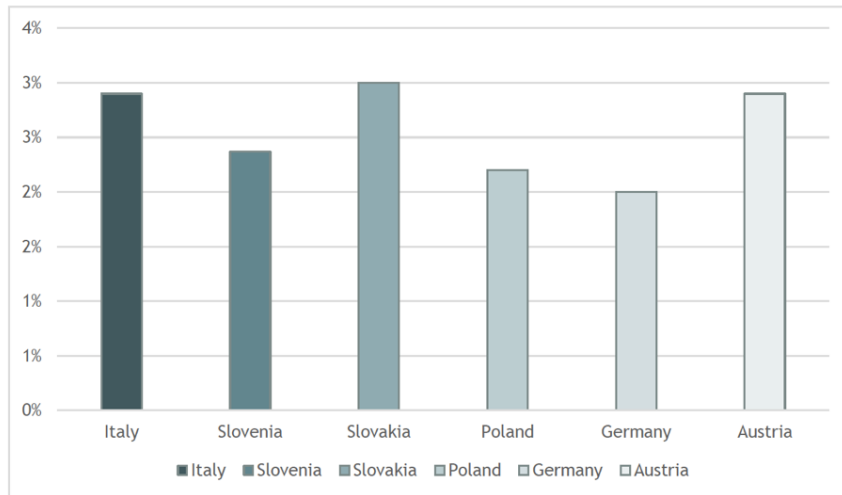


**5 %** economic value CCI in total partners GDP.



However, considering the data emerged by existing mapping in project partner countries, it is noteworthy to observe that although the number of companies and workers in the CCI in project partner countries represent almost half of the European average, the economic value created falls within the same European average of 5%. This could mean that the value created per company and per person in CCI of PP is stronger and more relevant than the European average.

CCI Growth rates of gross value added:



The analysis also showed that the value generated by the CCI also depends on professional profiles. There are three types of workers that, according to the intersection of sectors and professions, flow into the supply-chains:

1. Professionals carrying out cultural and creative professions within companies acting directly in CCI supply-chain.
2. Support figures, who work alongside the professionals of the culture in performing tasks, always within companies acting in the Core Culture sector.
3. Some actors activate the process of cultural and creative contamination, that is, all those who perform tasks within the boundaries of cultural and creative professions, but in companies outside the Core perimeter of the culture.

This differentiation is a key factor in CCI innovative change of framework and important to understand the future cooperation collider between CCI and AVM.



## AVM & CCI: “Every company is a cultural good”

The statement, mentioned above, reports a very clear trend found in several interviews in 6 region's partners of COCO4CCI project. All partners recognize the need to build a concept of cooperation collider between cultural and creative industries and advanced manufacturing. This is related to Symbola new category of creative-driven industries as economic activities that use cultural and creative content and skills to increase the value of their products. This definition could be re-design and re-build by introducing new innovative and contemporary economic dynamics that characterize AVM and its cultural and innovative processes by including economic activities already heavily involved as:

- creative process for new digital tools and datamining;
- marketing and communication for manufacturing - value-oriented, storytelling and re-branding;
- strategic consultancy for manufacturing - re-design processes, business theatre, business culture, etc.

The Symbola document also refers to two trends as the two possible directions to create the cooperative and collaborative links between CCI and AVM that should be pursued.

### Vertical trend

Manufacturing companies are asked to rethink their traditional focus on products and services:

- by innovating products and services by giving a new value, which is fundamental to create competitive advantage;
- by re-thinking their products, by creating new services, pre and post-sell relationships, or “servitization” processes;
- by re-thinking their brand positioning, creating meaningful products/services/relationships with customers through communication and new narratives.

### Horizontal trend

The slow horizontal movement of creativity, as a strategic asset, in sectors that we have often perceived as extraneous to this sphere, especially technology and digital domain, but also for food and agrifood or tourism. By this we can:

- build new bridges and open a new area of business full of potential;
- provide platform for a cooperation collider concept (horizontal trend represent the predisposition to create new business models);
- build on new mindsets where culture and creativity are no more enemies of manufacturing logics, but instead, mutually necessary.



## Challenges: aligning interest between AVM and CCI

The complementarity between CCI and AVM in creating new innovative business models or added value to existing products is in need for complementary skills and competences which correspond to each one. In order to create cooperation processes between CCI and AVM a work need to be done in skills and competences such as:

- the need for training for both CCI and AVM professionals in transversal competences (the creative in AVM processes and the manufacturers in creative and cultural skills);
- the need to create interdisciplinary teams able to communicate and work for a common goal.

New mindsets require the effort to sharing knowledges and to find all the potential of tacit knowledges which every professional could offer. It also needs to experiment creative workflows or interactions, by accepting the error and the risk as normal element to reach innovative outputs.

### REFERENCE

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