The Entrepreneurial Dimension of the Cultural and Creative Industries

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1. Pre Pilot Interview schedule

Expert interviews for Study on the entrepreneurial dimension of cultural and creative industries

This Study has been commissioned by the Education, Audiovisual and Culture Executive Agency of the EU and is co-ordinated by Utrecht School of the Arts (HKU) with the support of K2M and EUROKLEIS. We are trying to establish several expert perspectives on the scope of this work and would appreciate your help in answering the questions below.

The following schedule of questions is indicative and is not intended to be exhaustive. Pleaser include any further comments and/or suggestions you may have.

Question 1: Scope and definition

Q1.1 In your opinion, does the proposed study **adequately cover** the main themes and issues for this sector?

Q1.2 If not, which themes and issues should be included?

Q1.3 Do you have any **critical remarks** on the the use of the terms '*cultural and creative industries*' and '*entrepreneurial dimension*'?

Q1.4 Which practical **outcomes** would be most useful from the study and how might these be best formulated?

Question 2: Ongoing activities

Q2.1 Are there any activities of which you are aware that have been conducted at a ***local, regional*** or **national** level to support creative entrepreneurship?

Q2.2 Are there any activities of which you are aware that have been conducted at a ***sectoral*** level to support creative entrepreneurship?

Q2.3 Are there any activities of which you are aware that have been conducted at a ***European*** level to support creative entrepreneurship?

Question 3: Key factors

Q3.1 Having looked at the specifications for the study, what would you consider to be the main entrepreneurial ***driving*** factors for SMEs in the creative industries?

Q3.2 And what would you consider to be the main entrepreneurial ***limiting*** factors for SMEs in the creative industries?

Question 4: Trans-national co-operation

Q4.1 Do you think there is a need for trans-national co-operation and exchange in this area?

Q4.2 Are you aware of any trans-national initiatives in this area?

Q4.3 Upon which dimensions are these initiatives based (eg disciplinary, language, cultural..)?

Question 5: Entrepreneurial elements

Q5.1 We propose to focus on **five key elements** of the entrepreneurial dimension for this study. Which of the following elements would you consider the most important:

(1) Entrepreneurial Skills, (2) National regulations & IPR(3) Financial access & Entry barriers (4) Innovation & ICT (5) Research & Training

Q5.2 What do you consider the most important **trends** in these fields?

Q5.3 Are there any other elements, which it would be useful to consider?

Question 6: Structured access to support

Q6.1 At which points do you think the creative SME sector requires access to entrepreneurial **support**? (eg Initial Phase, Start Up, Development, Expansion)

Q6.2 To what extent can this support be externalised and embedded in **policy models**? (eg

Enterprise Support Centres, financial services, training and coaching)

Q6.3 Do you think the current levels and types of support are **sufficient** and relevant?

Q6.4 Are there any **good examples** of support, which could be applied at a wider level?

Question 7: Inclusivity

Q7 Much of the work undertaken thus far on creative entrepreneurship has a strong west-European slant. How might the study ensure greater **inclusivity** for all European member states?

Question 8

Q8.1 Are there any individuals, organisations or networks that we should contact for this study?

Q8.2 Would you like to be invited to the **Expert Workshops** that will be held later this year?

Please add any further comments. Thank you for your help.

Interviewees

- **Prof. Maurizio Galluzzo**, teaches "The Economics of Information and Communication" at the University of "La Sapienza" of Rome
- **Dr. Lidia Varbanova**, she is a freelancer and a Co-director of the Center for Intercultural and Social Development in Montreal.
- **Prof. Jeroen Van Mastrigt,** Head Game Design & Development Programme at Utrecht School of the Arts (HKU), The Netherlands
- **Mr. Joost Heinsius**, Head of Kunstenaars en CO, The Netherlands

2. Online Expert Questionnaire

1. Personal information

Title:	
Name:	
Surname:	
Gender (M/F):	
Organisation:	
Position:	
Country of Activity:	

Please select your primary country of activity and expertise; for European wide activity and expertise type EU.

Sectors of expertise	

Please select from: (multiple selection possible)

ICT	
CCI SME policy making	
Statistical	
IPR Policy	
Entrepreneurship Training	
Scientific Research	
Financial Markets	
R&D	
EU cultural and creative industries & policies	
Export Policy Maker	
Higher education	
Innovation policy Lisbon Agenda	
Creative Cities/Communities	

Cultural Policy makers	
UN creative economy programme	
Other: ………………	

Years of expertise in selected sector:	

2. Transversal issues Faced by cultural and creative industries

I. *Please rank the following transversal issues in order of importance to all sectors of the cultural and creative industries?*

Entry Barrier	
Barriers to Growth	
Regulatory Issues	
Access to Finance	
Entrepreneurship	
Access to Knowledge and R&D	
Skills and Innovation	

II. Are there any other issues that should be addressed?

Free Text

II. Which type of support organisation are best placed to respond to the needs of SMEs? Please rank from 1 (very likely) to 4(least likely)

Local	
Regional	
National	
European	

IIa) Why?

Free text

III. How do you think the financial crisis has affected the CCIs? Please rank from 1 (most important) to 6 (least important)

	Number of employees					
	Freel.	1-9	10-49	50-99	100-249	>249
No Credit available						
Shorter Payment date						
Default of Payment						
Decline in demand for CCI products						
Staff Reduction/No Recruitment						
No Investment in New Technology or Design Driven Strategy						
Don't know						
Other						

3. Access to Finance

I. What kind of financial support can best assist the CCI SMEs? Please rank from 1 (most important) to 5 (least important)

Bank Loan	
Seed Financing	

Venture Capital	
Private Grants	
Public Grants	

II. What are other kind of financial support which can best assist the CCI SMEs?

Free Text

4. Entrepreneurship

I. What are the most *relevant entrepreneurial skills for CCI? Please rank from 1 (most relevant) to 10 (least relevant)*

Leadership Skills	
Communication Skills	
Problem Solving Skills	
Networking Skills	
Business Plan Vision	
Administrative/Financial Skills	
Readiness to take risk	
Marketing Skills	
Creative Thinking	
International Export Vision	

II. What are the other entrepreneurial skills required for the creation of CCI?

Free text

III. What are the best examples of CCI SME entrepreneurship support that you know of?

Free text

IV. To what extent can the educational system can assist in acquiring entrepreneurial skills?

choice

Free text

V. Do you have any ideas on how the European Union could foster entrepreneurship in CCI?

Free text

III. From the following factors, please rank in order of importance the most relevant factors in supporting the creation of CCI SMEs? Please rank from 1 (most relevant) to 9 (least relevant)

Business Advices	
Financial Access	
CCI tax specific regulations	
Training Opportunities	
Support in Providing R&D	
Networking opportunities	
Start up plans	
Legal recognition	
Creative Thinking	

IV. From the following factors, please rank in order of importance the most relevant factors in supporting the growth of CCI SMEs. Please rank from 1 (most relevant) to 8 (least relevant)

Use of Technology	
Use of Design as a Business Strategy	
Access to external Market	
Export Opportunities	

Support in Providing R&D	
Networking opportunities	
Business Advices	
Access to external Market	

VI . What other factors contribute to CCI SMEs growth?

Free text

4. Technology

I. What do you think are the most important uses of technology and ICT for CCI SMEs? Please rank from 1 (most important) to 4 (least important)

Knowledge/goods production
Office tools
Communication tools
Administration tools

II. What other use of ICT and technology can be useful for CCI SMEs?

Free Text

5. Regulatory issues

I. What are the most important regulatory measures that CCI SMEs face?

Tax Regulation	
Business Start up Regulation	
Intellectual Property Regulation	
Social Welfare Regulation	
Labour regulations	
Bankruptcy Laws	
Antitrust Laws	

II. What are other regulatory issues that Cultural and Creative SMEs face?

Free text

III. What kind of support would be most helpful in supporting SMEs to protect their intellectual property (eg:EU/National/Local)?

Free text

IV. *Can you give any examples of good practices?*

Free text

6. Entry barriers

I. What are the most relevant entry barriers for the different sized cultural and creative SMEs at the European level ?

	Number of employees					
	Freel.	1-9	10-49	50-99	100-249	>249
Presence of Established Strong Brands						
Exclusive Agreement with Key Distributors						
Price Competition						

Cost of Production						
Intellectual Property Protection						
Access to Finance						
Access to knowledge/ R&D						
Lack of Business support Mechanisms						
Unfavourable Economic Context						
Lack of Entrepreneurial Skills						

II. What are other specific entry barriers for cultural and creative industries?

Free text

7. Access to knowledge and R&D

I. For CCI, what are the most *relevant sources of knowledge? Please rank them from 1 (most relevant) to 7 (least relevant)*

Individual knowledge sharing	
Open Information Sources	
Closed/Paid information Sources	
From the co-operation with private actors	
From co-operation with sector associations	
From the co-operation with the public administration	
From the co-operation with university/research Institute	

II. What are the three most important sources of knowledge for cultural and creative SMEs?

Free text

III. How do the CCI SMEs access relevant skills and competence to become and stay competitive?

Free text

III. What is your judgement on the quality of professional training for C SMEs?

Professional Training						

Please express your opinion by selecting one from: bad, poor, medium, good, excellent

8. Skills and innovation

I. What are the most *relevant sources education and training for CCIs?*

Universities / Educational Institutions	
Public research Institutes	
Private non profit institutions	
Specialised Public/semi public innovation support services	

II. Do you know of any best practice in education and training for CCI SMEs ***?***

IV. How would you define innovation needs in CCI SMEs and how to measure it?

Free text;

V. *What is your judgement on the integration of design as a business and innovation strategy for C SMEs?*

Design Integration						

Please express your opinion by selecting one from: bad, poor, medium, good, excellent

9. Barriers to growth

I. What are the most relevant cost factors which obstruct CCI's growth? Please rank 1 (most relevant) to 3 (least relevant)

Cost of Labour	
Cost of Knowledge	
Insufficient Access to Finance outside the firm	

II. What are other specific cost factors for the different firm sizes of SMEs in your selected sector that hamper growth?

Free text;

III. What are the most *relevant knowledge factors in hampering firm's growth? Please rank 1 (most relevant) to 7 (least relevant)*

Lack of qualified personnel	
Lack of information on Technology	
Lack of access on knowledge	
Lack of access on technology	
Lack of business advices	
Lack of network	
Difficulty in identifying new market	

IV. What are other specific knowledge factors of SMEs that obstruct growth?

Free text

V. For each type of firm (by number of employees), what are the most *relevant managerial factors in hampering firm's growth?*

Lack of leadership Skills	
Lack of Strategic Vision	
Lack of marketing skills	
Lack of Communication Skills	
Lack of Problem Solving Skills	
Poor Business Plans	
Lack of Administrative /financial Skills	
Lack of management skills	
Inability to track investors	
Inability to access external business advices/ support	
Lack of Creative Thinking	

VI. What are other specific managerial factors for the different firm sizes of SMEs that obstruct C SMEs growth?

Free text;

VI. What are other specific factors that obstruct cultural and creative SMEs growth?

3. List of Expert Interviewees

	Country	Country Cluster	Name	Surname	Organisation
1	Spain	Str. Weak Trad	Francisco	Aguilera Orihuel	Alliance Mondiale du Cinema Europe
2	Netherlands	Knowl Econ	Tsveta	Andreeva	European Cultural Foundation
3	Denmark	Knowl Econ	Charlotte	Appelgren	Cine-Regio
4	Italy	Str. Weak Trad	Pierfrancesco	Attanasio	AIE (Italian Publishers Association)
5	Netherlands	Knowl Econ	Brett	Bannink	Utrecht Province
6	Belgium	Str. Strg Trad	Vivien	Blot	IMPALA (Independent Music Companies Association)
7	United Kingdom	Knowl Econ	Tom	Campbell	London Development Agency Limited
8	France	Str. Strg Trad	Patrick	Chantepie	Ministry of Culture
9	France	Str. Strg Trad	Patrick	Cocquet	Cap Digital
10	Belgium	Str. Strg Trad	Pascal	Cools	Flanders District of Creativity
11	Germany	Str. Strg Trad	Monika	Cziesla	G.I.B. NRW - Gesellschaft für innovative Beschäftigungsförderung mbH
12	Belgium	Str. Strg Trad	Anita	Debaere	PEARLE (Performing Arts Employers Association League Europe)
13	Netherlands	Knowl Econ	Rob	Doctor	Berlage Institute
14	Belgium	Str. Strg Trad	Nikola	Frank	European Broadcasting Union
15	Portugal	Str. Weak Trad	Fernando José	Freire de Sousa	Portuguese Permanent Representation to the EU
16	Spain	Str. Weak Trad	Edgar	Garcia Casellas	Catalan Institute for Cultural Industries
17	Netherlands	Knowl Econ	Joost	Heinsius	Kunstenaars & Co
18	United Kingdom	Knowl Econ	Norman	Hill	Firstport
19	Bulgaria	Emerging Weak Econ	Irina	Ivancheva	Ministry of Culture
20	Finland	Knowl Econ	Juha	Jarvinen	TAIK Design innovation centre
21	Belgium	Str. Strg Trad	Peter	Jolling	Flanders Ministry of Culture
22	Sweden	Knowl Econ	Peter	Karlsson	Regional Development Agency
23	Finland	Knowl Econ	Kirsi	Kaunisharju	Mininstry of Education and Culture
24	Austria	Str. Strg Trad	Andrea	Kohl	MICA (Music Information Center Austria)
25	Finland	Knowl Econ	Leena	Laaksonen	Mininstry of Education and Culture
26	Austria	Str. Strg Trad	Rudolf	Lichmannegger	CWA (Creativ Wirtschaft Austria)
27	Romania	Emerging Weak Econ	Delia	Mucica	Ministry of Culture

	Country	Country Cluster	Name	Surname	Organisation
28	Denmark	Knowl Econ	Jan	Opstrup Poulsen	The Centre for Cultural and Experience Economy
29	Spain	Str. Weak Trad	Montserrat	Pareja Eastaway	University of Barcelona
30	United Kingdom	Knowl Econ	Siân	Prime	Insitute for Creative and Cultural Entrepreneurship, Goldsmiths, University of London
31	Netherlands	Knowl Econ	Dick	Rijken	University of Applied Science in The Hague
32	Belgium	Str. Strg Trad	Jan	Runge	KEA European Affairs
33	Finland	Knowl Econ	Markku	Salimäki	Aalto University School of Economics
34	Estonia	Emerg. Virtous	Jorma	Sarv	Ministry of Culture
35	Netherlands	Str. Strg Trad	Maaike	Segers	Ministry of Culture
36	Austria	Str. Strg Trad	Paul	Stepan	Fokus Austria
37	Belgium	Knowl Econ	Olav	Stokkmo	IFPRO Rights Agency
38	Finland	Knowl Econ	Silja	Suntola	Creative Industries Finland
39	Netherlands	Knowl Econ	Erik	Uitenbogaard	COCI (Centrum van Ondernemerschap in de Creatieve Industrie), HKU
40	Estonia	Emerg. Virtous	Ele-Mall	Vainomäe	Talinne Creative Incubator
41	Denmark	Knowl Econ	Steinar	Valade-Amland	Danish Design
42	Netherlands	Knowl Econ	Muriel	van der Klei	Ministry of Economic Affairs
43	Netherlands	Knowl Econ	Jeroen	van Mastrigt	HKU (Hogeschool voor de Kunsten Utrecht)
44	Finland	Knowl Econ	Juha	Vanska	Lapeenranta University of Technology
45	Belgium	Str. Strg Trad	Edith	Vervliet	Flanders Fashion Institute
46	Denmark	Knowl Econ	Niels	Vinther	Euro Centre Denmark
47	Netherlands	Knowl Econ	Viktor	Wijnen	Dutch Game Garden

4. Expert Interview: Question schedule

1. Scope and Definitions

- *What do you understand by entrepreneurship in the CCI sector? Is the term creative entrepreneurship useful and if so in which ways?*

- *Do you see a need to strengthen entrepreneurial skills of cultural and creative entrepreneurs, in which ways?*

2. Lifecycle of entrepreneurial activity

In light with our previous work done in phase I, we have developed a model of the entrepreneurial life cycle with roughly 5 phases? (see attached Utrecht Model)

- *Do you agree with the different phases of entrepreneurship?*
- *What would you say is the most important phase for supporting CCIs and why?*
- *In which phase would you say the entrepreneurs' needs are concentrated?*
- *In which phase would say the entriprise's needs are concentrated?*

3. Types of Support

There are many different types of support (regulatory measures, SME advice center, network, sectoral association, innovation funds, etc..) and policy operating for the CCIs at different levels of authority.

- *Which ones do you think are most effective and which ones are the least effective?*
- *Why do SMEs not use these sources of support more often or effectively?*
- *According to the model, what other types and sources of support to better support entrepreneurship in CCI do you think should be available? Eg:*
    - *Individual support*
    - *Entreprise level*
    - *City Level*
    - *Regional Level*
    - *National Level*
    - *Sectoral Level*
- *In your opinion, what types of support is most important for each phase?*
- *How could support be better targeted to ensure paths to growth for SME organizations and enterprises?*

4. Support at the regional/national level in the country

- *How important do you find the region for supporting CCIs?*
- *According to the model, what type of support should be available at the **regional** level? (Innovation, Finance, entrepreneurship training, IPR, Business modeling,access to market opportunities…)*
- *According to the model, what type of support should be available at the **national** level? (Innovation, Finance, entrepreneurship training, IPR, Business modeling, access to market opportunities…)*
- *At which level of authority do you think support to CCI entrepreneurship should be focused?*

5. European level

- *What can/should be done to better support creative entrepreneurship at a European level?* This can be for the CCI in general and also for your sector.

6. Best practices

- *Do you know any regional best practices of support for creative and cultural industries?*
- *What other examples do you have of good practice that you would like to share with us?*

7. Documentation

- *Do you have specific documentations concerning the different types of entrepreneurship support in your region, in your country or in your sector?*

5. Online Survey: Questionnaire

Section 1 – Enterprise Info [Mass Questionnaire – Part I]

1. ***Which of the following sectors does your enterprise mainly operate in?***
2. ***What is your enterprise sphere of operation?***
3. ***In which country your division is located?***
4. ***At 31st dec 2008, what is your enterprise legal status?***
   - **public**
   - **private**
   - **freelancer**
5. ***At 31st dec 2008, your enterprise was a :***
   - profit
   - non profit
   -

(If Non-Profit) At 31st dec 2008, your enterprise was a
- Foundation
- Association

6. ***In the last financial year (2008), which was the most important financing source?***
7. ***Which of the following sectors does your enterprise mainly operate in?***
8. ***What is your enterprise sphere of operation?***
   - Local
   - Regional
   - National
   - European
   - International/outside EU
9. ***In which country your division is located?***
10. ***At 31st dec 2008, what is your enterprise legal status?***

    - public
    - private
    - freelancer
11. ***At 31st dec 2008, your enterprise was a :***
    - profit
    - non profit
    -

(If Non-Profit) At 31st dec 2008, your enterprise was a
- Corporation
- Partnership

(If Non-Profit) At 31st dec 2008, your enterprise was a
- Foundation
- Association

12. ***In the last financial year (2008), which was the most important financing source?***

Risk capital
Bank loan
Seed financing
Self-financing
Stock markets
Donation / Sponsoring
Private grants
Public grants
Tax incentives

13. ***In the previous financial years (2007-2008), what was the most important financing source?***

Risk capital
Bank loan
Seed financing
Self-financing
Stock markets
Donation / Sponsoring
Private grants
Public grants
Tax incentives

14. How much was your annual turnover at 31st December 2008? (Millions of Euro)

2	
2-> 10	
10-> 50	
>50	

15. How many full-time employees your enterprise had (including you) at 31st December 2008?

1-2	
3-9	
10->49	
50->249	
>250	

16. Globally, how many people (full-time, part-time, occasional, and so forth) on average had been working for your enterprise during 2008?

1-2	
3-9	
10->49	
50->249	
>250	

17. How many years of activity your enterprise had at 31st December 2008?

1	
1-3 years	
3-5 years	
> 5 years	

Section 1 – Profiling [Mass questionnaire – Part II]

1. According to these descriptions, at this moment, in which phase would you position your organization:

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

Section 2 – Entrepreneurship

2. How do/did you gain entrepreneurship skills? (you can choose several options)

- Through graduate and post graduate education in entrepreneurial and business skills
- Through informal personal networks
- Through internships and on-site learning experiences or learning by doing
- Through lifelong learning initiatives and training courses
- Through advanced training in business management

- Through private business courses
- Through vocational training in design methods in service and product development
- Through basic training in project co-ordination, team-building and peer to peer netowrking
- Through basic training in financial and business modelling
- Through centers that support SMEs and entrepreneurship
- Through entrepreneurship training at the regional level
Through entrepreneurship training at the national level
Through entrepreneurship training at the local/municipal level

3. Do you think that you had sufficient entrepreneurial skills when starting your company?

Agree	
Disagree	
Don't know	
Strongly agree	
Strongly disagree	

4. ***What type of support in acquiring entrepreneurial practices is most useful during the first phase***

- Through graduate and post graduate education in entrepreneurial and business skills
- Through informal personal networks
- Through internships and on-site learning experiences or learning by doing
- Through lifelong learning initiatives and training courses
- Through advanced training in business management
- Through private business courses
- Through vocational training in design methods in service and product development
- Through basic training in project co-ordination, team-building and peer to peer netowrking
- Through basic training in financial and business modelling
- Through centers that support SMEs and entrepreneurship
- Through entrepreneurship training at the regional level
Through entrepreneurship training at the national level
Through entrepreneurship training at the local/municipal level

5. Education and training is often the preferred instrument to foster a culture of entrepreneurship. Do you agree that entrepreneurship is sufficiently addressed in the educational system?

Agree	
Disagree	
Don't know	
Strongly agree	
Strongly disagree	

6. Life Long Learning (LLL) programmes providing personal and management skills, as well as risk management, can support starting and growing companies. In which phase of the life cycle are these programmes most useful?

Preparing the Ground	
Start up	

Build-up	
Build out	
Connecting	

7. At what level do you see this type of LLL programme most useful for your company?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	
International	

8. Where did you get advice and support when starting your company in the cultural and creative sector?

Through my personal network	
Through my sectoral organization	
At the regional level	
At the national level	
At the municipal level	
At the European level	

9. Do you see a need for the development of advice and support centres specifically for the creative and cultural industries?

Very Much needed	
Needed	
Not much needed	
No opinion	

10. At which level would these support centres be best placed?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	
International	

11. Do you think a programme which would strengthen technological and financial skills for cultural and creative entrepreneurs would be useful?

Very Much needed	
Needed	
Not much needed	
No opinion	

12. In which phases of the life cycle would this programme be most useful? (you can choose more than one phase)

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

Section 3 – Access to Finance

13. On average, what is the percentage of risk capital on your total investment? (Optional)

<10%
10%->30%
30%-> 50%
50%-> 70%
70% -> 90%

> 90%

14. On average, what was the percentage of your income coming from state (public) contribution in the last financial year? (Optional)

<10%
10%->30%
30%-> 50%
50%-> 70%
70% -> 90%
> 90%

15. At what stage of the entrepreneurial lifecycle is financial support most needed?

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

16. What is the main obstacle for your organisation to access finance?

Risk aversion from financial institution	
Difficulty in getting grants	
Time consuming procedures for public incentives	
No bank loan guarantees	
Public fund shortage	
High interest rate	
Time spent before approval of financial support	
No time to apply for grants incentives	
Other	

17. Which one was (or will be) the most important financial source? (please grade the 3 most important ones 1-3)

Risk capital
Bank loan
Seed financing
Self-financing
Stock markets
Donation / Sponsoring
Private grants
Public grants

18. What level of authority is most suitable for supporting access to finance for your organisation?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	
International	

19. What do you think is the most adequate tool to increase financial opportunities for your company?

Public grants	
Self-financing	
Bank loan	

Tax incentive	
Risk capital	
VAT Reducation for the CC products	
Donation/Sponsoring	
Micro Credit fund	
Private grants	
Innovation vouchers	
Seed financing	
Other	

20. What was the effect of the recent crisis on your turnover for 2009?

Strongly decrease the turnover (-10% up to -5%)	
Decrease the turnover (-5% up to -2,5%)	
Stable turnover (-2.5% up to 2.5%)	
Increase the turnover (+2.5% up to 5%)	
Strongly increase the turnover (5% up to 10%)	
Don't Know	

21. Does your organisation make any financial and economic planning (budget and updated business plan)?

No	
Yes: 1 year forecast	
Yes: up to 3 years forecast	
Yes: up to 5 years forecast	

22. If yes, do you elaborate the forecast:

Yourself	
Using professional consultancy	
Other please specify	

Section 4: Operating Environment

23. Which was the most important business-related challenge when starting your company?

Lack of finance	
Limited knowledge of how to run a business	
High competition in the market	
Lack of knowledge about the market	
Tax burdens	
Lack of social security tailored to the needs of CCIs	
Cost of intellectual property rights	
Other	

24. In which phase of the life cycle do you see the most need to support access to market?

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

25. At what level should this support for new market opportunities for your organization be provided?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	

26. In which phase of the life cycle do you see the most need to support for cross-border growth and cross-border markets?

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

27. At which level do you see a need in stimulating partnership between private business, public institutions and CC SMEs?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	

Section 5: IPR

28. Do you or did you received advices on Intellectual Property Rights?

No	
Yes	
Don't know	

29. If yes, at what level did you have these advices?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	

30. In which phase of the life cycle do you see a need for IPR advices?

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

31. What is the most commonly used instrument for the protection of creative outputs (IPR) for your organisation?

Does not use any specific instrument	
Confidentiality agreements	
Trademarks	
Creative Commons	

Patent	
Open Access	
Other	

Section 6 Innovation and the role of digital technologies

32. Do you see a need in further stimulating investment in innovation for CC SMEs?

Yes	
No	
Don't know	

33. If yes, at what level would you see this happening?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	

34. In which phase of the life cycle is innovation support most important for your company?

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

35. What is the aim of your organization when innovating?

Innovating to gain efficiency in the production of a service	
Innovating to match user's demands	
Innovating for aesthetical reasons	
Innovating for Social improvements	
Do not innovate yet	
Other	

36. How do/did you acquire knowledge about research and innovation initiatives and programmes related to your business?

Through the internet	
Through your professional experience	
Through personal network	
Through customers	
Through employees	
Through Research and Innovation and programs at the national level	
Through Research and Innovation and programs at the regional level	
Through Research and Innovation and programs at the local/municipal level	
Not required	

37. Do you see a need for stronger support in research and innovation for the creative and cultural industries?

Very Much needed	
Needed	
Not much needed	
No opinion	
Not needed at all	

Section 7 Co-Operation

38. Does your enterprise co-operate (or plan to co-operate) with other enterprises in the same sector?

Never	
Sometimes	
Often	
Always	
Don't know	
Not yet	

39. Does your enterprise cooperate (or plan to cooperate) with other enterprises in different sectors?

Never	
Sometimes	
Often	
Always	
Don't know	
Not yet	

40. What form of co-operations does your enterprise have:

Formal agreement	
Non Formal Agreement	
No current co-operation	

41. Does your enterprise work (or plan to work) within a collaborative business environment such as a creative cluster initiative or an incubator?

No	
Yes	
Never heard of	
Not yet	

42. If no, would you see a need for such collaborative business environment initiatives?

No	
Yes	
Don't know	

43. If yes, at what level would you see this happening?

Local	
Regional	
National	
European	
Sectoral Organisation/Association	

44. If yes, in which phase of the life cycle is this collaborative business environment most useful? (optional)

Preparing the Ground	
Start up	
Build-up	
Build out	
Connecting	

45. Do you see the need for increased opportunities for cross-sectoral SME co-operation?

Useful	
Very Useful	
No Opinion	
Not Very Useful	
Not Useful At all	

46. Do you see the need for increased opportunities for cross-regional co-operation to help the growth of CC SMEs?

Useful	
Very Useful	
No Opinion	
Not Very Useful	
Not Useful At all	

6. Workshop I : List of Participants

Surname	First Name	Organisation	Country
Aguilera Orihuel	Francisco	Alliance Mondiale du Cinema	Spain
Heinsius	Joost	Kunstenaars en Co	Netherlands
Blot	Vivien	IMPALA	Belgium
Delbeke	Marie	Flanders DC	Belgium
Jolling	Peter	Flanders Ministry of Culture	Belgium
Mowatt-Valade Amland	Steinar	Danish Designer	Denmark
Vervliet	Edith	Fashion Flanders Institute	Belgium
Debaere	Anita	Pearle (Performing Arts Employer Association league)	Belgium
Troussard	Xavier	Head of Unit, DG Education and Culture	EU
Pasqua	Sylvain	Policy Officer, DG Education and Culture	EU
Cassidy	Seamus	Policy Officer, DG Education and Culture	EU
Amaral Lopes	José Manuel	Policy Officer, DG Education and Culture	EU
Miladinov	Petar	Policy Officer, DG Education and Culture	EU
Hagoort	Giep	University of Utrecht Hoge School voor Kunsten Utrecht(HKU)	Netherlands
Kooyman	Rene	Ars Nova	Netherlands
Bellini	Francesco	Eurokleis	Italy
Ioannidis	George	K2M	Germany
Valente	Marilla	K2M	Netherlands
Ten Zijthoff	Sandra	K2M	Netherlands
Crombie	David	HKU- KMT	Netherlands
Mersch	Pierre	HKU- KMT	Netherlands
Tilquin	Emma	HKU-KMT	Netherlands
Hunge	John	HKU K&E	Netherlands
Khetaguri	Levan	Georgia Shota Rustavelli Theatre and Film State University	Georgia
Martin Sancho	Olga	Federation of European Publishers	Belgium
Attard	Anthony	Malta St James Cavalier Institute	Malta
Berhmann	Malte	European Games Developers Federation	Germany
Blijleven	Derk	Utrecht School of the Arts	The Netherlands
Boeymanss	Francis	KEA	Belgium
Calamatta	Narcy	European Council of Artists	Denmark
Despringue	Cecile	Society for Audiovisual Authors	Belgium
Gailite - Holmberg	Ilze	National Film Center of Latvia	Latvia
Montaldo	Valentina	KEA	Belgium
Ophuysen	Truus	ELIA	The Netherlands
Oreskin	Raul	Tartu Center of Creative Industries	Estonia

Pareja Eastaway	Montserrat	University Barcelona	Spain
Quinn	Mette	DG Entreprise and Industry	Belgium
Scrive	Sophie	European Newspaper Publisher's Association	Belgium
Streul	Carola	European Visual Artists	Belgium
Turrin	Enrico	Federation of European Publishers	Belgium

7. Workshop II : List of Participants

Surname	First Name	Organisation	Country
Aguilera Orihuel	Francisco	Alliance Mondiale du Cinema	Spain
Heinsius	Joost	Kunstenaars en Co	Netherlands
Khol	Andrea	Music Austria	Austria
Bulta	Nuria	Catalan Institute for the Cultural Industries	Spain
Jyrama	Annukka	Helsinki School of Creative Entrepreneurhsip	Finland
Ivancheva	Irina	Ministry of Culture	Bulgaria
Blot	Vivien	IMPALA	Belgium
Delbeke	Marie	Flanders DC	Belgium
Jolling	Peter	Flanders Ministry of Culture	Belgium
Mowatt-Valade Amland	Steinar	Danish Designer	Denmark
Vervliet	Edith	Fashion Flanders Institute	Belgium
Banninck	Brett	Provincie Utrecht	NL
Vanska	Juha	Innovation Circus Project	Finland
Van Vessum	Ingrid	Pearle (Performing Arts Employer Association league)	Belgium
Cabirol	Anne Laure	Pearle (Performing Arts Employer Association league)	Belgium
Lijden	Peter	Cultuur Invest	Belgium
Lauzikaite	Milda	Koperator	Lithuania
Meissnitzer	Heidemarie	Permanent Representation of Austria to the EU	Belgium
Caudron	Martin	Up Tex Brussels Office	Belgium
Troussard	Xavier	Head of Unit, DG Education and Culture	EU
Pasqua	Sylvain	Policy Officer, DG Education and Culture	EU
Cassidy	Seamus	Policy Officer, DG Education and Culture	EU
Amaral Lopes	José Manuel	Policy Officer, DG Education and Culture	EU
Miladinov	Petar	Policy Officer, DG Education and Culture	EU
Ostrowski	Tomasz	Policy Officer, DG Entreprise and Industry	EU
Hagoort	Giep	University of Utrecht Hoge School voor Kunsten Utrecht(HKU)	Netherlands
Kooyman	Rene	Ars Nova	Netherlands

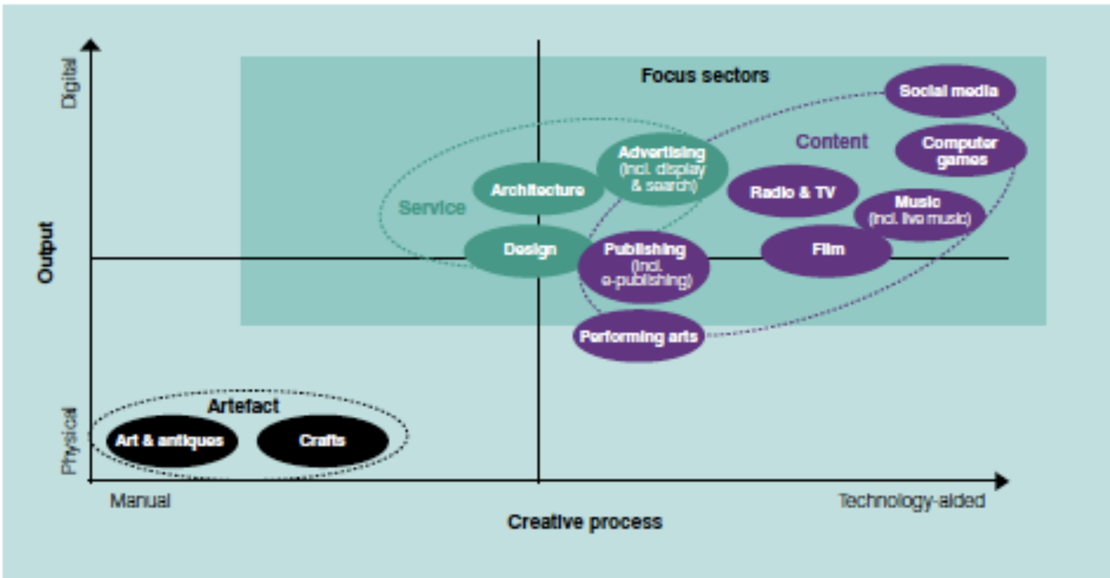
Bellini	Francesco	Eurokleis	Italy
Ioannidis	George	K2M	Germany
Valente	Marilla	K2M	Netherlands
Ten Zijthoff	Sandra	K2M	Netherlands
Crombie	David	HKU- KMT	Netherlands
Mersch	Pierre	HKU- KMT	Netherlands
Tilquin	Emma	HKU-KMT	Netherlands

8. Procurement Type and Innovation Effects

	Adapted procurement	Technological procurement	Experimental procurement	Efficient procurement
Role of the public sector	Niche user	Large/sophisticated costumer	Experimental/lead user	Efficiency-driven customer
Dominant motivation of procurement award criteria	Adaptation/ customisation to specific needs The best/better adapted solution	Fitness for use, value for money The best available/ most efficient solution	Functional product performance The most innovative solution	Price, volume Value for money
Product/service type	Diverse designs, customised	At least one product design	Emerging design, prototype, pilot	Mostly undifferentiated, standard
Potential innovation type	Market niche	Architectural	Radical	Incremental

Source: Uyarra, E. and Flanagan, K. (2010), *Understanding the Innovation Impacts of Public Procurement. 'European Planning Studies.'* 18(1), pp.123-143 cited in NESTA (May 2010), *Research Report: Opportunities for innovation through local government procurement- A case study of Greater Manchester*, p.18

9. Graph of Sector Clustering



Technology Strategy Board approach to Creative Industry sector segmentation

(Source: UK Technology Strategy Board, p. 21)

10. NACE codes

The database on which our analyses were conducted is based on data coming from the national Chambers of Commerce in the EU-27. The whole database (from which the population relevant the CCI study has been extracted) in the European Union contains plus of 13 million of registered companies around Europe.

As a consequence a number of people and organizations in the creative industries are not accounted for since many creative workers plays as sole entrepreneurs or professionals[1]. Moreover government subsidized institutions, educational activities are not registered under an entrepreneurial entity as well as free-lancers, professionals or professionals associations not registered as company. According to the most common definition in Europe, a company is a form of body corporate or corporation, generally registered incorporated in a public restristry according to the national legislation. It does not include a partnership or any other unincorporated group of persons. Instead, the enterprise is the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. An enterprise carries out one or more activities at one or more locations. An enterprise may be a sole legal unit.

On the total amount of companies (the full database), we have selected the companies that are registered in one of the country of the EU-27 areas. This set is around 11 million of registered companies. From this set, we have extracted the ones that results “active” (very nearly to 10 million), and that are “independent” (8.747.323 registered companies). An active company is a company that is not in: bankruptcy, dissolved, dissolved (merger), dissolved (demerger), in liquidation, inactive (no precision). An independent company means that there is not shareholder with more than 25% direct or total ownership; publicly listed companies; companies for which all shareholders belong to categories "one or more individuals or families" or "Employees/Managers/Directors" as well as companies whose all shareholders with a stake greater than 25% belong to categories "one or more individuals or families" or "Employees/Managers/Directors"; or that is unknown the situation.
This set (8.747.323) represents the independent, registered in one of the EU-27 Country, active companies.

Considering only these NACE (rev. 1.1) activity sections (industries) of the real economy (not financial):

- **Section C**: Mining and quarrying
- **Section D**: Manufacturing
- **Section E**: Electricity, gas and water supply
- **Section F**: Construction
- **Section G**: Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods
- **Section H**: Hotels and restaurants
- **Section I**: Transport, storage and communication
- **Section K**: Real estate, renting and business activities

We reach a total of 7.117.559 registered companies.

The selection of economic activities and the way to collect the firms related to the CCIs is based on the KEA 2006 study “The Economy of Culture in Europe”[2].

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[1] Higgs P., Cunningham S. and Bakhshi H.: *Beyond the Creative Industries– Mapping the creative economy in the United Kingdom*. London: NESTA 2007.

[2] http://www.keanet.eu/Ecoculture/Study%20new.pdf

We have selected the NACE (Rev. 1.1)[3] activities codes relevant to the CCIs. NACE is the acronym (from the French 'Nomenclature statistique des Activites economiques dans la Communaute Europeenne'-Statistical classification of economic activities in the European Community) used to designate various statistical classifications of economic activities developed since 1970 by the European Union. It is designed to categorise data relating to “statistical units”, in this case a unit of activity, for example an individual plant or group of plants constituting an economic entity such as an enterprise. It provides the basis for preparing a large range of statistics (output, inputs to the production process, capital formation and financial transactions) of such units.

The selection task has focused primarily on the Fashion Industry, beginning from the one done in the KEA study. The Fashion industry in the KEA study is composed of companies whose primary NACE activity code is one of the following :

NACE Code	Description
1700	Manufacture of textiles
1800	Manufacture of wearing apparel
1930	Manufacture of footwear
2624	Manufacture of other technical ceramic Products
5116	Agents involved in the sale of textiles clothing, footwear and leather goods
5141	Wholesale of textiles
5142	Wholesale of clothing and footwear
5241	Wholesale of textiles
5242	Wholesale of clothing and footwear
7487	Other business activities n.e.c.
9305	Other business activities n.e.c.

Looking at these activities, it is clear how it was considered not only the fashion design and the creative activities closely related to fashion, but the sector as a whole (the full supply chain): from tissues to the commercial distribution. Thus, the consideration on page 56 of the KEA study (“Related industries are impossible to circumscribe, but they encompass industries that rely on content production. These are not captured in statistical classifications and comprise, for example, the production and distribution of “blank media”, cinematographic supplies, TV receivers, CD/DVD players, MP3 players, musical instruments, computer equipment and mobile phones.) is not considered so pressing.

The NACE code identified in our study relevant to the Fashion Industry are:

NACE Code - Description
1700 – Manufacture of textiles
1800 – Manufacture of wearing apparel; dressing and dyeing of fur
1900 – Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear
5116 – Agents involved in the sale of textiles, clothing, footwear and leather goods
5124 – Wholesale of hides, skins and leather

[3] http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=NACE_1_1&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC&CFID=1600866&CFTOKEN=44909a768759921a-4FBED6EA-A77A-A9F5-BDBFFCB69A2B822A&jsessionid=f9005632d38d55107b46

5141 – Wholesale of textiles
5142 – Wholesale of clothing and footwear
5241 – Retail sale of textiles
5242 – Retail sale of clothing
5243 – Retail sale of footwear and leather goods
5271 – Repair of boots, shoes and other articles of leather

In brief, we have considered the full activities in the NACE 19., we have added the NACE 5243 – 5271 (inconsistency with the previous choice), we skipped the 7487 and 9305 because there were too broad categories [Figure 1 and Figure 2]. The choice to exclude the 7487, despite the presence of fashion design in that NACE code, is due to the impossibility to estimate the percentage of companies that in that activity code are strictly tied to the "fashion design". In general, this consideration remains valid for all the NACE code. The impossibility to estimate accurately the companies related to CCIs means to obtain values of the total number of firms, employees and turnover that cannot be taken (strictly) as the aggregate of the CCIs, which moreover is not the objective of this study. We are interested, once selected the sample, to analyse the **distribution** of companies among countries and industries in the area of EU-27, assuming that, in the database used, the cultural and creative enterprises, even if they are a subset of the selected sample, these observe the same distribution according to what suggested by the comparison of tables 6 and 7. .

In general, considering that the database do not register all the existing companies, the cultural and creative enterprises could be in number, employees and turnover product other than aggregated values we reported.

Detail

Code: 74.87

Description: Other business activities n.e.c.

This item includes: This class includes:
- bill collecting, credit rating in connection with an individual's or firm's creditworthiness or business practices
- business brokerage activities, i.e. arranging for the purchase and sale of small and medium-sized businesses, including professional practices
- appraisal activities other than for real estate and insurance
- fashion design related to textiles, wearing apparel, shoes, jewellery, furniture and other interior decoration and other fashion goods as well as other personal or household goods
- services of graphic designers
- trading stamp activities
- activities of interior decoration designers
- activities of fair, exhibition and congress organizers
- activities of stand designers
- activities of self-employed auctioneers
- activities of consultants other than technical and engineering nec.
- reading of gas, water and electricity meter

This item also includes: This class also includes:
- activities carried on by agents and agencies on behalf of individuals usually involving the obtaining of engagements in motion picture, theatrical production or other entertainment or sports attractions and the placement of books, plays, artworks, photographs, etc., with publishers, producers, etc.

This item excludes: This class excludes:
- machinery and industrial plant design, see 74.20
- display of advertisement and other advertising design, see 74.40

Reference to ISIC Rev. 3.1: 7499x

Figure 1 - NACE 74.87

Detail

Code: 93.05

Description: Other service activities n.e.c.

This item includes: This class includes:
- astrological and spiritualists' activities
- social activities such as escort services, dating services, services of marriage bureaux
- pet care services such as boarding, grooming, sitting and training pets
- genealogical organizations
- shoe shiners, porters, valet car parkers, etc.
- operation of coin-operated personal service machines such as photo booths, weighing machines, machines measuring blood pressure etc.

Reference to ISIC Rev. 3.1: 9309x

Figure 2 NACE 93.05

When the Fashion Industry has been identified, we have followed the same track to reconstruct the other industries, avoiding duplication of NACE codes, including NACE codes in order to consider the whole chain and skipping NACE code that are too broad.

In the Table 1 we report out selection of NACE codes, in Table 2 we compare it with the KEA study of 2006 and to the Söndermann[4]. For further information and the activities included or excluded in the NACE classification see Eurostat (Statistical Classification of Economic Activities in the European Community, Rev. 1.1 (2002)).

In short, with regard to the fashion sector, the full supply chain was integrated as it proved impossible to circumscribe the fashion design area so some activities such as retail were included. Moreover, in the visual arts, the sector of photography and digital photography is included in the market. This bias will consequently raise the growth importance of visual arts.

Industry	NACE REV. 1.1.
Advertising	**7440 –** Advertising
Architecture	**7420 –** Architectural and engineering activities and related technical consultancy
Books and Press	**2211 –** Publishing of books **2212 –** Publishing of newspapers **2213 –** Publishing of journals and periodicals **2215 –** Other publishing **2221 –** Printing of newspapers **2223 –** Bookbinding **2224 –** Pre-press activities **5247 –** Retail sale of books, newspapers and stationery **9240 –** News agency activities
Design (Graphic and Product Design)	**2222 –** Printing n.e.c. **2225 –** Ancillary activities related to printing **2124 –** Manufacture of wallpaper **2621 –** Manufacture of ceramic household and ornamental articles **2622 –** Manufacture of ceramic sanitary fixtures **2630 –** Manufacture of ceramic tiles and flags **2861 –** Manufacture of cutlery **2913 –** Manufacture of taps and valves **3350 –** Manufacture of watches and clocks **3610 –** Manufacture of furniture **3622 –** Manufacture of jewellery and related articles n.e.c. **3661 –** Manufacture of imitation jewellery **5144 –** Wholesale of china and glassware, wallpaper and cleaning materials **5244 –** Retail sale of furniture, lighting equipment and household articles n.e.c. **5273 –** Repair of watches, clocks and jewellery

[4] "Culture and Creative Industries in Germany and in the European Context", Paper by Michael Söndermann (25-11-2007).
"Culture and Creative Industries in Germany", Research Report No 577, edit by Michael Söndermann (February 2009).
Note that these studies, sometimes, used NACE codes with 5 digits that are not applicable onto our database of companies.

Fashion	**1700 –** Manufacture of textiles **1800 –** Manufacture of wearing apparel; dressing and dyeing of fur **1900 –** Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear **5116 –** Agents involved in the sale of textiles, clothing, footwear and leather goods **5124 –** Wholesale of hides, skins and leather **5141 –** Wholesale of textiles **5142 –** Wholesale of clothing and footwear **5241 –** Retail sale of textiles **5242 –** Retail sale of clothing **5243 –** Retail sale of footwear and leather goods **5271 –** Repair of boots, shoes and other articles of leather
Film, Video and DVD	**9211 –** Motion picture and video production **9212 –** Motion picture and video distribution **9213 –** Motion picture projection **2232 –** Reproduction of video recording **2465 –** Manufacture of prepared unrecorded media **5245 –** Retail sale of electrical household appliances and radio and television goods
Music	**2214 –** Publishing of sound recordings **2231 –** Reproduction of sound recording **3630 –** Manufacture of musical instruments
Performing Arts	**9231 –** Artistic and literary creation and interpretation **9232 –** Operation of arts facilities **9234 –** Other entertainment activities n.e.c.
Radio and Television	**9220 –** Radio and television activities **3220 –** Manufacture of television and radio transmitters and apparatus for line telephony and line telegraphy **3230 –** Manufacture of television and radio receivers, sound or video recording or reproducing apparatus and associated goods **5143 –** Wholesale of electrical household appliances and radio and television goods
Software publishing including Games	**7221 –** Publishing of software **7222 –** Other software consultancy and supply **2233 –** Reproduction of computer media
Visual Arts	**9252 –** Museums activities and preservation of historical sites and buildings **2464 –** Manufacture of photographic chemical material **3340 –** Manufacture of optical instruments and photographic equipment **7481 –** Photographic activities

Table 1 - relationship between CCIs and related NACE (rev.1.1) activity codes (EUROKLEIS Elaboration)

Legend of the Table 2	
xxxx	NACE code found in each study
xxxx	NACE code found only in the KEA study
xxxx	NACE code found only in the SOENDERMANN study
xxxx	NACE code not considered in our study
xxxx	NACE code adds in our study

Industry	NACE REV. 1.1.	KEA STUDY	SOENDERMANN STUDY	Differences

Advertising	**7440**	**7440**	**7440**	
Architecture	**7420**	**7420**	**7420**	
Books and Press	**2211** **2212** **2213** **2215** **2221** **2223** **2224** **5247** **9240**	**2211** **2212** **2213** **5147** **5247** **5261**	**2211** **2212** **2213** **2214** **2215** **924x**	**Adds:** **222x**: "Printing and service activities related to printing" are support activities to publishing of books, newspaper, etc.. 2222 and 2225 are more related to the Design Industry (2222= Prints graphic arts; 2225= design of printing products) **Exclusions:** **2214:** "Publishing of sound recordings". Activity inserted in the Music industry. **5147:** "Wholesale of other household goods". Too broad code **5261:** "Retail sale via mail order houses". Too Broad code.
Design (Graphic and Product Design)	**2222** **2225** **2124** **2621** **2622** **2630** **2861** **2913** **3350** **3610** **3622** **3661** **5144** **5244** **5273**	**2222** **2225** **7420** **7440** **7487** **9231** **9305**	**7487**	**Adds:** **From 2124 to 5273**: Are activity codes that identify companies and outputs that have a clear "design" identification and on which these companies can establish the differentiation and identification of its product sales. **Exclusions:** **7420:** in Architecture **7440:** in Advertising **7487:** Too Broad code. It includes fashion design, but without a clear estimate on only this activity, it is better to not list in order to avoid distortions. **9231**: In Performing Arts **9305**: not relevant activities
Fashion	**1700** **1800** **1900** **5116** **5124** **5141** **5142** **5241** **5242** **5243** **5271**	**1700** **1800** **1930** **2624** **5116** **5141** **5142** **5241** **5242** **7487** **9305**	**7487**	**Adds:** **1900, 5124, 5243 and 5271**: take into account the leather goods and luggage. **Exclusions:** **2624:** "Manufacture of other technical ceramic products" are not relevant activities. **7487:** Too Broad code. It includes fashion design, but without a clear estimate on only this activity, it is better to not list in order to avoid distortions. **9305**: not relevant activities

Film, Video and DVD	9211 9212 9213 2232 2465 5245	9211 9212 9213 5248 7140	9211 9212 9313	**Adds:** **2232 and 2465**: are support activities to Film, Video and DVD. **5245**: includes "retail sale of musical records and audio/visual tapes, CDs, DVDs and cassettes" **Exclusions:** **5248:** "Other retail sale in specialized stores" are too broad activities. **7140:** not relevant activities.
Music	2214 2231 3630	5248 9231	923x	**Adds:** **2214**: "Publishing of sound recordings" **2231**: "Reproduction of sound recording" **3630**: "Manufacture of musical instruments" **Exclusions:** **5248:** "Other retail sale in specialized stores" are too broad activities. **9231:** In performing Arts
Performing Arts	9231 9232 9234	9231 9234	-	**Adds:** **9232**: "Operation of arts facilities" **Exclusions:** -
Radio and Television	9220 3220 3230 5143	9220 6420	9220	**Adds:** **3220, 3230**: are support activities to radio and television (manufacture of…). **5143**: completes the industry chain **Exclusions:** **6420**: "Telecommunications". It includes radio and television transmission but it is too centered on telecommunication.
Software publishing including Games	7221 7222 2233	7221 2214	7221 7222	**Adds:** **2233**: "Reproduction of computer media" **Exclusions:** **2214**: "Publishing of sound recordings"

Visual Arts	9252 2464 3340 7481	9252 5212 5248 7020 7487 9231 9232	9251 9252 9253	**Adds:** **2464, 3340**: support to the photographic industry ("Manufacture of photographic chemical material" and "Manufacture of optical instruments and photographic equipment") **7481**: "Photographic activities" **Exclusions:** **9251 and 9253**: not relevant ("Library" and "Botanical and zoological gardens") **5212:** not relevant **5248**: not relevant **7020**: "Letting of own property": too broad. "letting of exhibition halls" is only a small part of these activities. **7487**: too broad **9231 and 9232**: in Performing Arts

Table 2 - Comparison of NACE codes

11. Regional Concentration of CCIs by Sectors

(Source: European Cluster Observatory,(March 2010), *Priority Sector Report: Cultural and Creative Indutries, p. 19-20)*

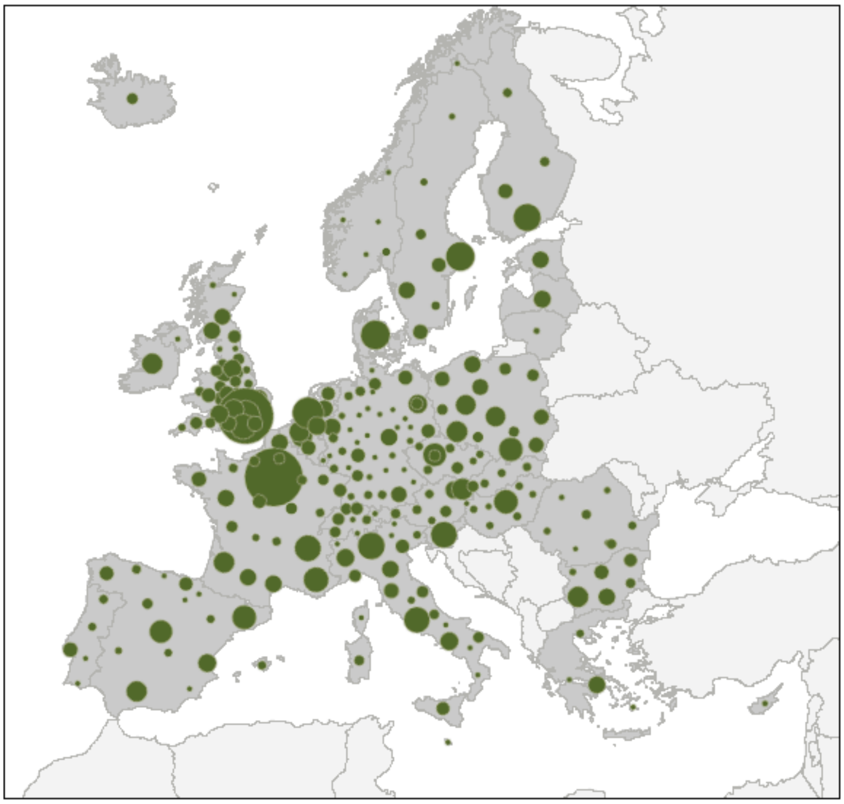

Fig 1. Regional Cluster of Artistic creation and literary interpretation

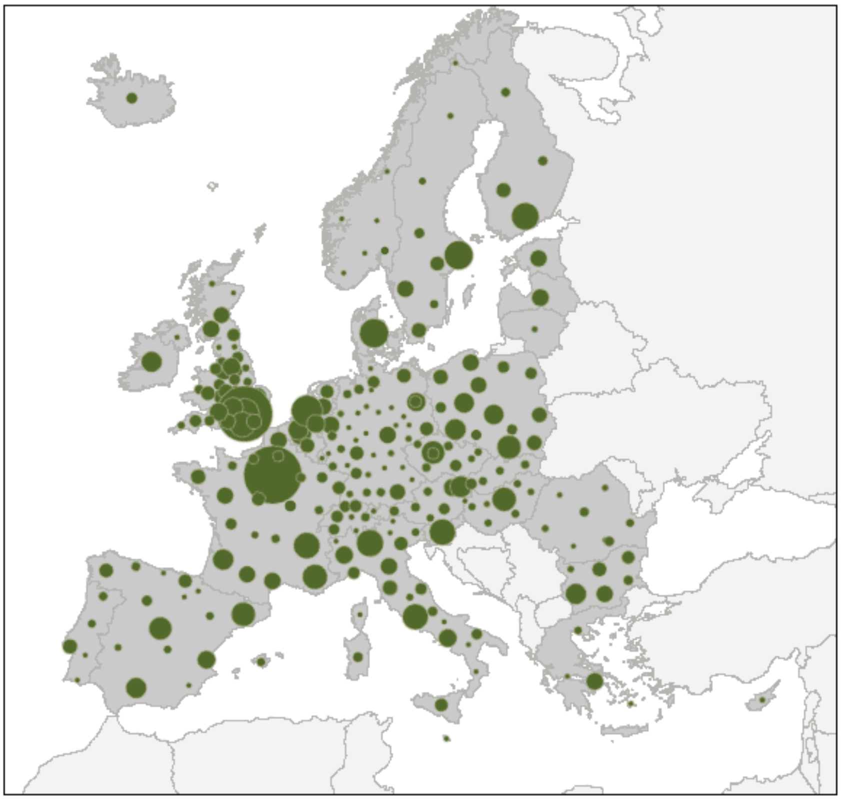

Fig 2 Regional Cluster for Advertising Sector

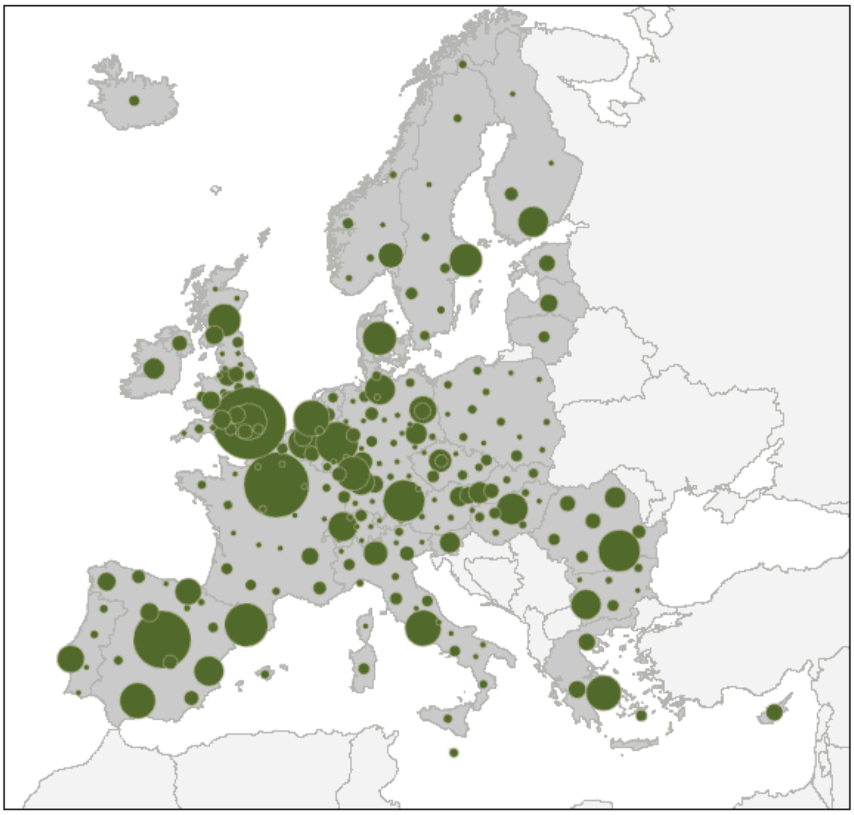

Fig 3 Regional Cluster for Radio and Television Activities

12. Environmental factors summary table

	AU	BE	BG	CY	CZ	DK	EST	FI	FR	DE	GR	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SL	SP	SW	UK
Recognition of CCI as something specific																											
Recognition of CCI in policy	yes	yes	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	yes	yes	yes
Specific department for CCI	no	no	no	na	no	yes	yes	comb	no	no	no		no	no	yes	no	no	yes	yes	no	no	no	no	no	no	no	yes
Integrated approach to CCI and CCI SME support	na	yes (	no	na	no	yes	almos	yes	yes	no	no	no	no	no	yes	no	na	no	yes	no	no	no	no	no	yes	yes	yes
Specific Programmes for CCI																				no							
Specific Programmes for CCI Start-ups	yes	no	no	no	no	na	na	yes	no	yes	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	yes	no	yes
Specific Programmes for CCI in terms of Financial measures	yes	yes	no	na	no		na	na	yes	yes	na	na	yes	no	na	na	no	not	yes	no	no	no	na	na	yes	yes	yes
Specific Programmes for CCI in terms of Internationalisation measures	yes	na	yes	na	yes		yes	yes	yes	yes	yes	yes	yes		yes	yes		na	yes	no							yes
Social-Security																											
Pension supplement	yes	yes	yes	no	no	no	no	yes	yes	yes	yes	yes	no	no	no	yes	no	no	no	yes	no	no	no	yes	no	yes	no
Unemployment benefit for artists	yes	yes	yes	no	yes	no	yes	yes	no	no	no	no	yes	no	no	no	na	no	yes	no	no	no	no	no	no	no	no
Specific Labour Law for cultural and creative entrepreneurs or SMEs	yes	yes	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	no	no	no	no (e›	no	no
Fiscal measures																											
Tax deduction on income of artists	yes	no	yes	no	no	no	yes	yes	yes	yes	yes	yes	yes	no	yes	no	na	no	no	yes	no	yes	yes	yes	yes	yes	yes
tax leveraging over the years	yes	no	yes	na	no	yes	yes	yes	yes	yes	no	no	no	no	no	no	na	no	yes	no	no		yes	no	yes	yes	yes
tax deduction for those investing in culture	yes	yes	yes	na	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	na	no	yes	yes	yes	yes	no	yes	yes	no	yes
Tax shelter for sector	yes	yes		na	not		yes		yes	yes	no		yes	yes			yes		no	yes					yes		yes
Public Bodies Responsible																											
Regionalisation of policy	yes	yes	no	no	yes	no	yes	yes**	no*	yes	no	no	no	no*	no*	no	no	yes	no*	yes	no	no	yes	no	yes	no*	yes
Central Ministry with Cultural Competence	yes	no	yes	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
Arts of Culture Councils	no	no	yes	no	yes	yes	no	yes	no	yes	yes*	no	yes	no	no	yes	na	yes	yes	no	yes	no	no	yes	yes	yes	yes
National Cultural Funds/Foundations and role	yes*	no	yes		yes	yes	yes	yes	reg.	ys	no	yes	no	no	yes	yes	na	no	yes*	no	yes	yes	yes*	yes	yes	yes**	yes
Support for Book Market																											
VAT Rate for Books	10%	6%	20%	n/A	n/a	25%	5%	8%	5%	7%	4.50%	5%	0%	4%	21%	5%		5%	6%	0%	5%	7%	10%	8%	4%	6%	0%