



EUROPEAN CREATIVE INDUSTRIES SUMMIT

•

ECIS REPORT

BRUSSELS 2015



CONTENTS

Preface	3
By Bernd Fesel, Chair ECBN	
I. Keynotes: The EU Policy Agenda	5
A. "The cultural and creative entrepreneur: a role model in Europe? Generating social value and economic wealth"	
- Keynote by Tibor Navracsics, European Commissioner for Education, Culture, Youth & Sport	
B. "Cultural and creative industries: Taking the lead in digital change in society, economy and culture"	
- Keynote by Prof. Dieter Gorny, Special Advisor for Creative and Digital Economy to the German Federal Minister for Economic Affairs and Energy and Managing Director of the european centre for creative economy (ecce)	
II. Dialogue: Chances and Challenges for Cultural and Creative Entrepreneurs	13
III. Survey: National Agendas for Cultural and Creative Industries in 2016	16
IV. The European Research Agenda 2016: Cultural and Creative Spillovers	22
V. Dialogue: The European Policy Agenda 2016	25
VI. Biographies of the Panelists	28
VII. European Creative Business Network	32



PREFACE



Dear supporters, friends and members of the European Creative Business Network,

„the EU takes a keen interest in the cultural and creative industries, among others because they are a source of economic growth. We believe that, in addition to its intrinsic value, culture has a significant economic return.“ Said Tibor Navracsics, European Commissioner for Education, Culture, Youth & Sport in his keynote to 2015's European Creative Industries Summit (ECIS). This documentary of the summit shows very clearly the rich variety of ideas and policies in different European countries when it comes to making the cultural and creative economy an integral part of future innovation for Europe. Beyond that, especially the exchange between several countries often shows astonishing value added. This is the main reason why a European network like ours might be able to achieve an unique support for the cultural and creative industries, and thus creative impulses for innovation and growth in Europe. A Manifesto enclosed here, that is representing the members of ECBN, even goes one step further and tries to help shaping European policy so that European cultural values and economic returns both play a more integrative and thus stronger part in the 21st century, via empowering cultural and creative entrepreneurs to make better use of their innovating powers.

Promoting the cultural and creative industries to bring in their full potential for growth within the framework of the Agenda Europe 2020 has led the European Commission and in 2015 the Latvian EU Presidency to focus its spillover effects in the wider economy and society. These transformational effects of culture and creativity beyond the sectors of cultural and creative industries are also on the agenda in several research and policy initiatives on national and European level. Given the on-going focus on cultural creative spillover effects within the funding period 2014–2020 – like Creative Europe, Innovationunion, Horizon 2020 – and taking into account the crossovers between the sectors the ECIS 2015 called to debate the values and future identity of cultural and creative entrepreneurs and the policy frameworks necessary.

I wish you a pleasant read and would like to invite you to help ECBN push the positive development of the European cultural and creative sector even further.“

Bernd Fesel

Chair European Creative Business Network



CHAPTER I.

•

KEYNOTES

THE EU POLICY AGENDA



The cultural and creative entrepreneur: a role model in Europe?

Generating social value and economic wealth

- Keynote by Tibor Navracsics, European Commissioner for Education, Culture, Youth & Sport

Ladies and gentlemen,

It is a pleasure to be here with you for this first European Creative Industries' Summit. Creative entrepreneurs are essentially investors in talent – their own or other people's. And talent is one resource that Europe possesses in enormous supply. It is a wealth that, if managed right, will engender more wealth, and benefit both our societies and our economies.

Today I would like to address the main challenges faced by the cultural and creative industries from a European perspective. And I will present the main elements of the strategic response developed by the European Commission.

The EU takes a keen interest in the cultural and creative industries, among others because they are a source of economic growth. We believe that, in addition to its intrinsic value, culture has a significant economic return.

The cultural and creative sectors make up nearly 4.5% of the European economy, thanks to nearly 1.4 million small and medium-sized businesses generating and distributing creative content all over Europe.



The cultural and creative sectors have shown great resilience during the crisis – they actually continued to grow – while stimulating creativity and innovation spill-overs in other sectors. About 8.5 million people are employed in creative sectors across Europe – and many more if we take into account their impact on other sectors such as tourism and information technology.



As we shift towards a knowledge economy, value is increasingly created at the intersection of arts, business and technology. Cultural and creative entrepreneurs are leading this trend. And yet, evidence shows that the potential of the cultural and creative sectors remains largely untapped. Clearly, more can and should be done to nurture and scale up Europe's creative ecosystems. The EU has the means to consolidate its status as the world's largest producer of cultural content – but we need to enhance our capacity to generate fresh ideas and to bring them to the market. For this to happen, public policies must stimulate innovation, support experimentation and promote networking on a larger scale.

At EU-level, we have been working to address these challenges for some time. But there is more to do. In particular, I believe that further action is needed in five areas.

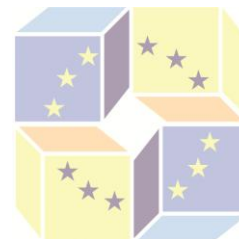
First, **skills**: The mix of skills needed for creative entrepreneurship is changing rapidly. Some sectors are facing a shortage of employees with technical and traditional skills and crafts, because young people in particular are reluctant to take up such skills. I believe we need to forge stronger partnerships between cultural and creative entrepreneurs on the one hand and education and training systems on the other, both through initial training and continuing professional development. Second, **access to finance**: Cultural and creative businesses tend to find it hard to obtain external financing. This is due to their small size, uncertainty

about the demand for their products, the complexity of their business plans and their lack of tangible assets. As a result, it is difficult for cultural and creative entrepreneurs to develop and grow their businesses.

That is why we have created the Creative Europe Guarantee Facility, which will take off next year. It will help European cultural and creative entrepreneurs to get easier access to bank loans. We will also help bankers gain the expertise they need to analyse the specific risks associated with the sector. Alternative sources of financing such as crowd-funding also need to be further explored – this is something else we are doing at EU level.

Third, **access to markets**: Globalisation and the digital shift are having a profound impact on the arts and the cultural sector. They are rapidly changing how art and cultural products are made, distributed and accessed.

Cultural and arts institutions and services need to seize new opportunities and respond to changes in audience behaviour and expectations. Thanks to new digital tools, there are now ways to enable consumers to access a wider variety of products and to open the creative process to greater participation. Here too, Creative Europe can be of great help. As indeed can be the completion of the Digital Single Market. I believe that a genuine, open and accessible Digital Single Market will be a great boost for European creativity.



Of course the Digital Single Market, and in particular the modernised copyright rules, must also benefit creators and creative entrepreneurs. I am working very hard with my fellow Commissioners to ensure the right balance between the protection of rights-owners and access for users.

Fourth, **going international**: Creative entrepreneurs need smart internationalisation and export promotion policies. This will allow them to operate on the global stage and reach new audiences and markets.

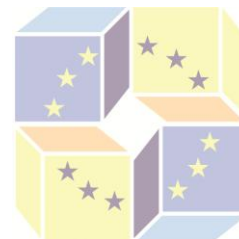
Finally, **promoting cross-overs with other sectors**: Cultural and creative entrepreneurs need to learn to function in multi-disciplinary environments where they can meet with entrepreneurs from other industries. This means that policy makers have to test and develop better business support instruments to facilitate linkages and spill-overs. The Commission is addressing these issues. We are working with Member States on designing the relevant policies. And we are providing support to the sectors themselves through our funding programmes, notably the Creative Europe programme.

Other EU funding programmes are no less relevant. ERASMUS+ for example supports skills development through education and training, and it helps to build knowledge and partnership through alliances. COSME promotes entrepreneurship, access to finance and markets for small and medium enterprises, and HORIZON 2020 supports research and innovation in the field of culture and cultural heritage.

The creative industries start with individual creativity. But creative people are to a great extent the result of the world in which they live and of the circumstances that give them opportunities to shine. I am personally committed to making Europe the best place for creators. I want to promote a better business ecosystem for them, in line with our overall strategy to strengthen growth and job creation. I count on your support in this and wish you good discussions this afternoon.

Tibor Navracsics

European Commissioner for Education, Culture, Youth & Sport



Cultural and creative industries:

Taking the lead in digital change in society, economy and culture

- Keynote by Prof. Dieter Gorny, Special Advisor for Creative and Digital Economy to the German Federal Minister for Economic Affairs and Energy and Managing Director of the European Centre for Creative Economy (ECCE)

Ladies and gentlemen,

It might be a worn-out phrase, but it nevertheless gets to the heart of the matter: right now, we are in the middle of a process of massive technological and social transformation. In fact, this change has never been so fast and far-reaching as it is today. However, the nature of processes is such that the results often become visible only *after the fact*. In other words, it is only when we look back that we see the big picture revealed. This applies especially to the process of digitization, which is a quiet revolution. There's nothing to see, because everything that is happening is invisible. But we have known for a while now that digitization started to deconstruct many things long ago, in particular content, communication, forms and media. It is exciting to see how the debate regarding these developments has changed over the past three years. At the 2012 ECHO, the German Music Awards, I quoted the former chairman of the German Publishers and Booksellers Association, who had noted the following at the opening of the Leipzig Book Fair: "Until now, I've experienced my profession as a creative one. (...) I have enjoyed many trusting collaborations with authors, (...) but now I read that publishers are being described as content brokers



and as members of a criminally organized content mafia."

In contrast, the successor at the Association noted the following only recently in Leipzig: "The launch of this year in books was very promising. The book industry is taking an optimistic and confident approach to digitization. There was a very clear sense of that approach at the tradeshow."



In 2012, the discourse was still dominated by the idea of complete freedom online.

The key demand involved breaking down analogue structures, principles of order, values and business models. The discursive standard delineated **"two worlds" – one that was analogue, yesterday and traditional, and one that was digital, tomorrow and innovative.**

Then came Snowden. And that changed everything. The exaggerated depiction of the internet as an instrument for more democracy and large-scale social participation gave way to serious concern. The discourse became focused on "surveillance," "technological totalitarianism" and "data capitalism."

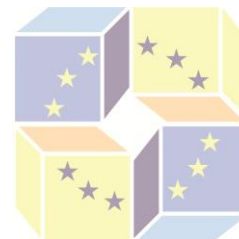
The compelling digital debate that took place in Germany's leading "FAZ" newspaper – a month-long discussion in which leading minds from the worlds of politics, science and business tackled the theme of digitization – certainly helped to foster an even broader social discourse.

To name just a few, one of Germany's first and best known internet "evangelists" until then, spoke of a "digital insult" and concluded that the prior form of internet enthusiasm "had proven itself to be defective." The President of the European Parliament Martin Schulz called for a regulated data market oriented toward fundamental rights. And the German Federal Minister for Economic Affairs Sigmar Gabriel warned that "the dangers of the digital revolution lie in authoritarian and perhaps even totalitarian tendencies that are inherent in the

possibilities of technology itself and that new monopoly powers undermine law and order."

These contributions marked a decisive turn in the way we look at these issues. In other words, we came to understand digitization not as a technological challenge but as a political and social one we all must face – not just political decision-makers.

Today, this approach has become a matter of course. In the intervening period, a sense of foreboding has taken root even in some die-hard, euphoric internet enthusiasts: "We need rules, an ordering structure, even on the internet." The **internet has become an elementary part of our society** and essential for our political, economic and cultural co-habitation; and this is only right, seeing as we do not consider co-habitation to take place in a lawless space in the analogue world either. We have taken one step further in the process of digitization: we are moving out of the "angst" phase and into the **phase of "consolidation."** The fog is lifting and we are getting a clearer view. The essential element now is the call for less hysteria, for a differentiated look at the situation. For example, **Generation Y** – a group that has been subjected to penetrating sociological scrutiny over the past several years – most definitely does not see the private sphere as a problem affecting solely the older generation or as a mere expression of a deep form of technophobia. On the contrary, the younger generation is simply much more adept at performing data housekeeping duties and more sensitive and well-versed in the ways they



make their information available to a clearly defined circle in the digital sphere.

Such skills presume knowledge of the complexities of the digital world, which in turn is the basis for its constructive reshaping. And we now find ourselves at precisely at this point.

One thing is for sure: digital transformation presents us with tremendous cultural challenges as a society. However, it also poses a major challenge to culture. Digital transformation is characterized by an enormous acceleration and increase in complexity in all realms of life.

Three factors shape these changes directly: firstly, there's the anthropological factor, i.e. the individualization that forms the basis of all the changes caused by digital innovation. We increasingly want to decide for ourselves when, where and how we consume, and not only content.

Secondly, there's the economic factor of globalization. And thirdly, there's the technological factor of digitization. The best example for the changing interplay of these three factors is the internet.

After the phases of euphoria, consternation and taking stock of concerns, what we can (and have to!) do today is to actively redesign our cultural, economic and social environment. It is good that the central concerns affecting our industry are contained in the coalition agreement:

this means that our focus must now be on actually implementing them.

And in this process of implementation, we should describe both the opportunities *and* risks of the digital era very clearly. The fact that risks exist is not subject to debate, but we have to take one step further and actually face these risks if we are going to be able to turn them into opportunities.

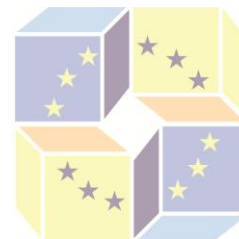
The first thing we need to do as a society is to **find answers as to how we want to live and work**.

What kind of values do we want to assume? How can we maintain them? What value does work have? What value does intellectual work have? Is everything leading to digitally correct one-man operations, or will there be "real" jobs and "real" growth.

We have to find answers to these questions, but not only for us in Germany.

We must also define these questions in the global context. Here once again – especially with regard to Silicon Valley – our voice will only be strong enough if **we find a joint European answer fueled by European values**.

In this process of social self-discovery, culture plays a special role as an identity-building cohesive force! This also means that the cultural and creative industry, which is a pioneer industry in terms of employment in the digital era, has the power to function as a role model for others. It was the first industry to experience a fundamental change in production processes and to discover how important – ever-increasingly important in economic terms – all questions relating to copyright and intellectual property actually are.



The creative industries are the core sector of the digital economy, but one thing is certain: we can only move forward if we move in solidarity. **The cultural and creative industries need support from political decision-makers.** It also needs a broad social consensus that the core of the digital economy – and thus also of employment and prosperity – requires the functioning of our social values in the digital sphere as well. At the core of these values are intellectual property and copyright: in fact, the acceptance and implementation of these two values are the prerequisites for the very existence of the creative industries.

We have to concentrate on where our strengths lie, i.e. in the **value creation that emerges out of innovation and creativity.**

We have to invest in the skills and potential of people and create an environment in which creativity can flourish and entrepreneurship is rewarded. In this sense, the ECBN Policy Manifest 2015, with its three fields of actions

1. Field 1: Culture Creative Innovation for the Investment Plan in Europe
2. Field 2: Culture Creative Factories for Growth in Europe
3. Field 3: Digital Capacities for Entrepreneurial Success plays a significant and important role.

But, first and foremost, we have to learn to understand the power and strength of ideas and innovations in and of themselves. Good ideas that can be transformed into high-quality creative content are at the very heart of the cultural and creative industries; they are the engine driving our knowledge-based society and sustainable European development. When they are used in a smart and far-sighted manner, they can lead us to economic prosperity and success. But when we allow them to be wasted, stifled or stolen, we lose not only our economic advantage but also the very foundation of our society.

Prof. Dieter Gorny

Special Advisor for Creative and Digital Economy to the German Federal Minister for Economic Affairs and Energy and Managing Director of the european centre for creative economy (ecce)



CHAPTER II.

DIALOGUE

Chances and Challenges for Cultural
and Creative Entrepreneurs

Contributors:

Prof. Lutz Engelke, TRIAD, Berlin

Janjaap Ruijsenaars, Universe Architects, Amsterdam

Francoise Le Crom, Vivendi, Paris

Moderator: Laure Kaltenbach, Forum d'Avignon, Paris



„With Europe facing global competition, it needs creativity the most“, says Prof. Lutz Engelke.

„But we need a new definition of creativity, a cross-sectoral one that clearly shows its strength: To produce innovation for all sectors of European economy. How can we help making people understand this important role of cultural creative entrepreneurs?“, asks Engelke. He would like to see a clearer focus on the crossover potentials of creative entrepreneurs and thus a different thinking on the side of major companies and politicians, too: „Once again we are on the brink of changing traditional ways of process management and roadmaps of thinking we have gotten used to. This is exactly why Europe needs to let innovative thinkers interfere with our routines and to encourage new visions and perspectives!“

"Cultural creative entrepreneurship is the opposite of making war. The European Union, the organization that by definition thrives on peace, should therefore support it highly between nations."

- Janjaap Ruijsseenaars

Janjaap Ruijsseenaars stresses that creative entrepreneurs should be allowed to „go with their gifts“, but that their projects also need to be realized in the process. Their important role doesn't just lie in „inspiring“ or „rethinking“ the traditional structures. „What does this mean concerning the amount of time that is needed to develop new modes of thinking, new forms of organisation, new products?“, asks Laure Kaltenbach. Lutz Engelke hints at the Mercedes Campus in Stuttgart, that is about to be expanded by a Future Lab: „You don't just need time, you also need money and different modes of research, which means not just supporting those who have already been successful.“

Françoise Le Crom points out the importance of interdisciplinary working groups able to connect different spheres and fields of work. An example for these could be TRIAD's Factory for Urban Future in Berlin, whose founder enthuses: „Cultural creative entrepreneurs need more freedom via spaces where they can experiment and develop their powers!“





The debate is opened to the audience and the question occurs if more research on mutual, European ground might be useful to bring in really new ideas and at the same time a shared system of values. Lutz Engelke argues that working on a regional level first to join forces later on is his favored mode of cooperation. Janjaap Ruijssenaars agrees: „The first question when it comes to innovation is: What is the answer to the problem? And then you have to know which resources you need for this project. After that you can look which country provides these resources best.“

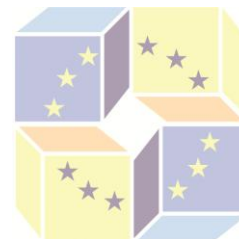
Another speaker mentions the importance of European meetings like this European Creative Industries Summit to bring forth the real possibilities of crossover networking. Françoise Le Crom agrees, especially if the exchange can rely on scouting for innovative ideas. Speaker Mehjabeen Price from Creative England points out that this is exactly what her organization, a member of ECBN, does. To which Lutz Engelke adds that such a transnational thinking should be established by the European Union by providing recurring platforms making such an exchange sustainable and regular. He also demands more creative entrepreneurs to be included, because „there is too much of engineers' and financially motivated knowledge in the boards.“

„Making Creative Europe a priority is not just words: 8 million jobs, thousands of companies - and more important: a way to prepare for the future and a society driven by people, helped by the combination of talents of both artists and engineers.“

- Laure Kaltenbach

Match-making between cultural creative entrepreneurs and the industries is important, but how exactly this happens weighs a lot. Françoise Le Crom points out the societal value of including diversity aspects as well as ideas of sustainability and participation into the European exchange on innovation via creativity.

„When we talk about the future of Europe, let's talk more about content, about ideas!“, concludes Lutz Engelke.



CHAPTER III.

•

SURVEY

The National Agendas for Cultural and
Creative Industries in 2016



Austria: Presented by Gerin Trautenberger

President of creativ wirtschaft austria, Vienna

The sixth Austrian report on cultural creative industries shows that the solo entrepreneur makes 63% of cultural creative entrepreneurs in Austria, which themselves make 10,4% of all companies there. Still it is necessary though to raise awareness of this fact by financing services and networking programmes. The ongoing strategy in Austria since 2008, developed by the Federal Ministry of Economy, austria wirtschaftsservice and creativ wirtschaft austria, also involves traditional companies associated with cultural creative economy and offers the „box-of-bricks“-approach of services. Regional competence centres and a country-wide representation of cultural creative industries are the key elements of creativ wirtschaft austria's work, with austria wirtschaftsservice offering complementary services. In 2016, this approach will focus on the digital agenda, aspects of innovation and regional development, another annual report and the „Creative Industries to Business“ campaign. The latter's strategy will include story telling about successful projects and cooperations via social media clips, advertorials and a press campaign, trying to „quicken the appetite for increased coopeartion“.



Italy: Presented by Prof. Pier Luigi Sacco

IULM University, Milano

In opposite to Austria, there is no similar strategical policy in a similar country like Italy (yet), and that even though the Power & Nielsen ranking lists five regions in its Top 25 of culture and creative clusters in Europe: „There is a widespread and evergreen issue in the Italian political-economic agenda about whether culture and creativity are really a major source of economic growth and added value.“ Thus culture and creative industries policies have been developed mainly by the regions, which makes lots of projects lack sustainability and consistency, as the political circles within the regions show themselves as being counter-productive for long-term approaches. An interesting novelty however comes from the National Operational Program on Culture 2014-20, targeting the five Convergence Regions in the South, which also focuses on the development of small and medium entrepreneurs. Videogames and software, communication and publishing sectors start being recognized as motors of innovation and growth. To support the development of a national strategy, anyhow there will be a focus on selected regions which have a special potential to become laboratories for development and experimentation.





Slovakia: Presented by Michal Hladky
Director of Košice 2013, Košice

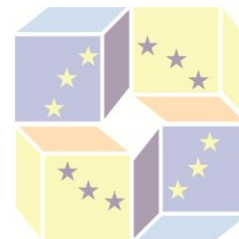
Looking for a sustainable approach to implement cultural creative industries in national policies after the European Capital of Culture, supporters have to deal with three different ministries: the Ministry of Culture, the Ministry of Economy and the Ministry of Education. Therefore the European Union's regional integrated programmes offer a necessary supplement to the national, still fragmented approaches. Cities and regions are being encouraged to develop an integrated strategy, bringing together „hard“ and „soft“ factors of innovation and crossover effects. This programme, including 300 Million Euros from the Ministry of Culture, is set to provide any city and region with a strategy by 2020. Therefore creative centres are being put as well as hundreds of small projects and enterprises are supported. The difference between before and after Košice 2013 is striking, not only because of the 2014-20 cycle, but also because there is a continuity introduced by the European Capital of Culture, not the least being the cooperation on a European level and the continuing exchange between European organizations, creative hubs and regional as well as national strategies. As an extraordinary step, Košice 2013 is being re-branded to Creative Industries Košice to merge the energies and serve as a focal point for further developments.



The Netherlands: Presented by Linde Gonggrijp
Managing Director of CLICKNL, Eindhoven

Standing for Creativity, Learning, innovation, Co-Creation and Knowledge, CLICKNL works as the Dutch creative industries network to connect inquisitive researchers with enterprising creatives to work together on sustainable solutions to societal and economic challenges like health and well-being, climate action and energy, inclusive societies and questions of transport. Goals are to develop a sustainable system, involve the industry and build consortia, to justify and showcase the added value of the creative industries and achieve a better competitiveness. Furthermore, the term „SCRUB“ describes other challenges: A Smart society, Creative futures, Re-defining innovation, User impact, Business transformation. The aim is to drive innovation by crossing over into other sectors like health, energy, smart industry and smart retail. Research and innovation programs in consortia with other companies are seen as the most important ingredient, but the main partners of CLICKNL play a major part in Dutch networking, too, for example the Dutch Creative Industries Council, the Federatie Dutch Creative Industries, The Rijksdienst voor Ondernemend RVO and the Stimuleringsfonds.





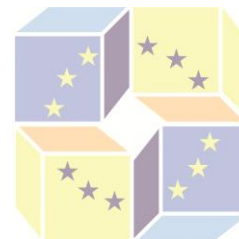
United Kingdom: Presented by Mehjabeen Price
Chief Operating Officer of Creative England, Bristol

The cultural creative industries in the UK grow faster than most other sectors, by 10% in 2014, holding 5% of the whole economy and 5,6% of all jobs there. They played an important role in the elections of 2015, where both major candidates mentioned their contributions to British economy prominently. There is a cross-party consensus about this, and also the Ministry of Economy and the Ministry of Culture both work together to support the creative sector. Tax reliefs for film, high-end TV, videogames, animation, children's TV and orchestras are a special component of the British policy, that will probably remain. The Creative Industries Council's strategy, under the name CreateUK, provides access to finance, supports education, skills, infrastructure and intellectual property and works internationally. Creating opportunities for entrepreneurs, improving regional infrastructures and promoting diversity are further components of the strategy for the creative sector, especially for creative England, which includes cooperations with the BBC and other important partners. London and the South East are the heart of the British Creative Industries, but to support entrepreneurs and networks all across the country remains an important issue for the next years to come.

Spain: Presented by Jordi Sellas
Director General for Creation and Cultural Companies of Generalitat de Catalunya, Barcelona

The cultural creative industries of Catalonia alone consists of more than 35.000 companies with about 160.000 employees. Hereby the Ministry of Culture follows the traditional value chain from creation to production and distribution to exhibition, with the Directorate for Cultural Development taking care of creation and venues and the Institute for Cultural Companies working with the companies, the markets and for a bigger audience. More employment in the sector and a larger audience are the main tasks to be fulfilled, which means that an economic return and also a social return are of biggest concern to the Ministry. Following the recommendations of the ECIA, a different level of strategical policy was introduced to the system lately. To achieve better innovation and growth rates, tools like public-private innovation challenges, capacity building in regional clusters and the launch of new and innovative financing schemes to support early stage SMEs have been established, as well as smart financial instruments like guarantee funds and a participative loan programme for digital businesses. All this means a huge innovation for the generally very traditional approach in the Spain.





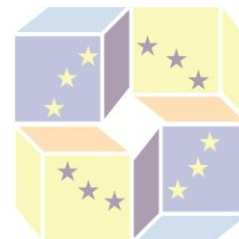
Portugal: Presented by Cristina Farinha
Addict, Porto

„There is no real strategy on cultural creative industries in Portugal“, states Farinha and shows how traditional the sectors work: There is the cultural sector dealing with heritage, venues, artistic creation and so forth. Science and Economy are largely seen separated from that, and the regions deal with tourism, urban rehabilitation and the qualification of human resources mainly by and for themselves. „References to cultural creative industries are very few.“ There has been research on creative hubs anyhow, resulting in finding most of them in Lisbon (36) and the North of the country (32), 14 in the centre, three on the islands and only one in the South, with most of them more or less on the coastal side of Portugal. This means that not only cross-sectoral, but also country-wide development is still in the beginning. With structural as well as financial support being cut off from the cultural creative industries, the innovation process is highly in question, resulting even in a slight increase concerning jobs, companies and turnovers in the last few years. The next elections seem crucial for the development of the cultural creative industries in Portugal: „We need a more consistent national strategy, as the possibilities of the sector are still not recognized enough.“

France: Presented by Laure Kaltenbach
Managing Director of Forum d'Avignon, Paris

Laure Kaltenbach explains that 3,2% of the GDP in France is coming from the cultural creative industries, meaning 6% of the value added. The Ministry of Culture and Communication has a budget of more than 7 Billion Euros, after cutbacks in the last few years increasing about 0,3% for 2015. This was not really to be expected, but with the European Union's 3% deficit spending limit to be complied in 2017, not in 2015, this was possible. The budget for „creation“ has risen 2% and reaches 743.3 Million Euro, performing arts receive 357 Million Euro (+0.4%) and artistic and cultural education 40.7 Million (+6.5%). 5,3 Billion Euro alone are being spent on media and cultural and public broadcasting, 2,7 Billion on culture and research. This focus, that also includes plenty of institutions, shows clearly where the cultural creative industries in France are at, especially when it comes to copyright issues, which remain a main aspect of cultural policies, together with a highlighting of general aspects of European culture and heritage.





Latvia: Presented by Zanda Tamulone
Senior Officer of Creative Industries Division,
Ministry of Culture of the Republic of Latvia, Riga

In Latvia the Ministry of Culture, the Ministry of Economy and the Ministry of Education and Science as well as institutions subordinated to these ministries are responsible for the development of cultural creative industries. The policy guidelines of „Creative Latvia“ for the term 2014-20 consist of four components: Growth; competitiveness and export; innovation-friendly infrastructure and environment; public awareness, research and monitoring. To reach the goal of crossing over to other sectors, international conferences a year are held, each one featuring special agendas, creative side events and exclusive souvenirs. Examples are the creativity week radi!2015 and Design Manifestation, the exposition and event cycle of the contemporary design of Latvia. Even there cultural creative crossovers are seen as an important ingredient to stimulate innovation, economic sustainability and social inclusion, as the government of Latvia has dedicated itself to raising awareness about the cultural creative sector's broad contribution to society and to facilitate crossovers between it and other sectors. The government also recommends to encourage the creation of a supportive ecosystem and to map existing policies and trends to improve data about the sector for a better exchange and development as well as the use of design thinking in the public sector.

Creative clusters like in the former Tabacco Factory and Creative Industries incubators dealing with education, cross-sectorial partnerships, pre-incubation, digital marketing and crowdfunding are instruments supported by the Ministry of Economy.

In 2016 there will also be the Creative Business Cup 2016, the continuation of the TAB FAB seed money project and the RaPaPro 2016, a creative partnership program with cultural education schools, involving art, design and music teachers and students, municipalities, entrepreneurs as well as social groups and other representatives from local communities.





CHAPTER IV.

•

THE EUROPEAN RESEARCH AGENDA 2016

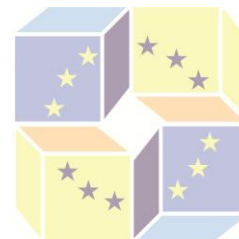
Cultural and Creative Spillovers

Contributors:

Richard Russell, Arts Council England, London

Toby Dennett, Arts Council Ireland, Dublin

Funda Celikel Esser, Joint Research Centre, Brussels

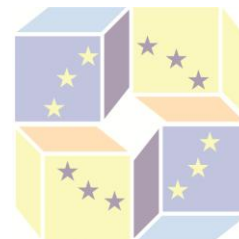


The first part of the panel sees Richard Russell and Toby Dennett present what the EU-wide research project **"Preliminary Evidence of Spillover Effects in Europe"** is about: In January 2015, the project was launched with the aim of better understanding the methodologies that could be used to better measure spillover effects of public investment - public money awarded directly or indirectly by government funded industry bodies - in the arts, culture and the cultural creative industries. A research alliance across Europe has contributed research to form an international evidence library. Tom Fleming Creative Consultancy was commissioned to analyse the evidence library - approximately 100 case studies (projects and activities) - and their spillover effects. In this research context, cultural and creative spillover is defined as the process by which activity in the arts, culture and creative industries has a subsequent broader impact on places, society or the economy through the overflow of concepts, ideas, skills, knowledge and different types of capital.

The accompanying research platform has been initiated by the Arts Council England (ACE) and the european centre for creative economy (ecce). It is funded by **ecce, Arts Council of England, Arts Council of Ireland, Creative England and the European Cultural Foundation**. The European Creative Business Network (ECBN) is managing the financial administration of the project and will be responsible for contractual processes and all payments.

This preliminary research will be used as a base to better understand and identify optimal conditions to enable spillover effects and to list indicators to measure these effects. To date this research is **the most comprehensive database on projects with spillover effects in Europe**, it is also the first project attempting to analyse the causality of spillover effects and their contribution to the EU Agenda 2020 and will be the first open-access digital research platform for spillover effects. The platform will be continually developed to reflect the ongoing research strategy and the suggestions of the community to share learning, encourage debate, help understanding of the term cultural and creative spillovers, collect more evidence and peer review the findings.

An **ongoing open research platform**: <http://ccspillovers.wikispaces.com>



In the second part of the Panel, Funda Celikel Esser presents the work of the **Joint Research Centre on monitoring the cultural and creative activities in European cities** and starts by introducing the Joint Research Centre (JRC) as one of the Directorates General of the European Commission, with headquarters in Brussels and seven research institutes located in five European countries (Belgium, Italy, Spain, the Netherlands, Germany). The **Composite Indicators Research Group (COIN)**, as part of the Econometrics and Applied Statistics Unit of the JRC, is working on a Cultural and Creative Index, that is meant to summarize the cultural and creative sector in a way that is of added value to EU policy makers and to urban planners interested in fostering the development of creativity and diversity. To function properly, these features would be needed: Full transparency and open access data; benchmarking with peer cities based on the economic level and population size; a detailed interpretation of results and city profiles (best practices, bottlenecks); conceptual and statistical coherence; **two complementary versions - a “standardised” and a “flexible” one**; a multidimensional approach while capturing spill-over effects and a long term commitment including regular updates.

Funda Celikel Esser presents several indexes that may serve as qualified examples: Florida's Creative City Index, the Hongkong Creativity Index, the ARC Creative City Index and the Quality of Life Index, among others.

The JRC-COIN is renowned for its expertise on statistical methodologies and technical guidelines on the development of sound composite indicators, which can be used in making informed policy decisions. Its work is published in peer reviewed journals and is used by the European Commission, international partners and the scientific community to improve the quality of their outputs. The JRC, together with the OECD, has published a “Handbook on Constructing Composite Indicators: Methodology and User Guide” which has become the reference report for practitioners constructing composite indicators in a variety of fields. **COIN has a rich portfolio of over 60 statistical audits of composite indicators** such as the Environmental Performance Index (Yale University, Columbia University), the Global Innovation Index (INSEAD & World Intellectual Property Organisation), the Multidimensional Poverty Assignment Tool (UN International Fund for Agricultural Development), the Global Competitiveness Index (World Economic Forum), and the Corruption Perceptions Index (Transparency International).



CHAPTER V.

•

DIALOGUE

The European Policy Agenda 2016

Contributors:

Prof. Lutz Engelke, TRIAD, Berlin

Janjaap Ruijsenaars, Universe Architects, Amsterdam

Francoise Le Crom, Vivendi, Paris

Moderator: Laure Kaltenbach, Forum d'Avignon, Paris



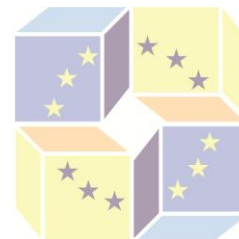
„What's next on the agenda for the cultural creative industries in Europe?“, asks Laure Kaltenbach, and Johanna van Antwerpen answers with a short film from 2014's ECIA closing conference and its motto „Create, Innovate, Grow.“ Van Antwerpen explains how the alliance developed and tested tools to stimulate the cultural creative industries on European, national and regional levels and suggested policies to reach these goals: „We tried to show why which project was successful.“ She also reports that at a certain point it was not that easy anymore to evaluate spillover effects, while crossover, cross-sectoral effects got more into the focus: „Concerning innovation it did not take lots of public money to produce good results via match-making, especially in Austria, Ireland and Italy.“ Concerning internationalization van Antwerpen stresses the importance of clusters and networking. „But we also have to do more mapping and measuring, because the European Commission needs proof of the importance of the cultural creative industries.“

„Cultural and creative industries are innovative in itself, but also drivers of innovation in other growing sectors as ICT, health, infrastructure.“

- Johanna van Antwerpen

Mehjabeen Price reports on the work of Creative England and points out that it is, and will be, hard work to keep networking on this field, not only in Britain, but very much also when cooperating with continental Europe. „England does have its issues with the European Union, but we all know that the cultural creative industries are an important factor in European economy – and we all know, too, that there is a growth factor when talking about this area.“ She mentions the success of Creative Europe programme, but that it's still not easy to find financial support, even though there is proof of the importance of cultural creative industries in and for Europe. Generally, Price sees three ways to overcome barriers to finance: more information on available finance options, more knowledge about creative business models for investors and banks and „leveraging private investment into intellectual property“.





“Cultural entrepreneurs are at the heart of the European project: based on our deep and diverse culture and on our ability to run business”.

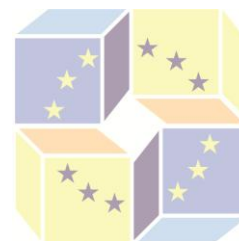
- Laure Kaltenbach

Axel Ganz highlights „one simple question“ that came to his mind after hearing the debates and presentations of the day: „Why doesn't political Europe focus stronger on a definition of a strategy for culture and creativity?“ Apart from questions of finance, research and evaluation there is a need for actions he doesn't see recognized in an adequate manner: „Culture is too often seen as a cost factor and not as an investment in creating value and jobs. Thus creativity has to be paid for and intellectual property protected - if we want to encourage intellectual and creative investment.“ He concludes that new ways of funding creative work have to be found, facilitating creative initiatives, no matter if the money comes from public or private hands. This would mean new business models, too, as well as an even better exchange between the European countries so the European Union can really rely on its rich cultural diversity. Ganz also advises for a harmonization of taxes on the field of culture and creativity and a legal framework for digital competition.

Bernd Fesel agrees on the need for a forward-looking EU strategy on culture and creativity and points to the work of ECBN and its Policy Manifesto of 2015, finding at the same time a few words to look back on the debates of the day and what has already been achieved: „ECBN has established itself as collaborative platform for creative industries in Europe over the last three years, already representing about 75% of its workforce through the leading intermediaries and agencies of 14 countries. This year's European Creative Industries Summit shows it clearly: Cultural creative entrepreneurs can and will be heard in Brussels.“

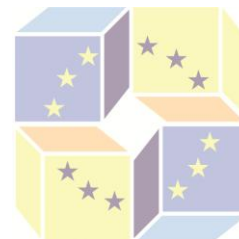


Laure Kaltenbach encourages all the speakers and guests to keep up the good work, quoting Axel Ganz again: „Culture and creativity have to make noise to be heard!“



CHAPTER VI.

•
Biographies
of the Panelists



Dialogue: Chances & Challenges for Cultural and Creative Entrepreneurs

Prof. Lutz Engelke

The founder of the creative agency TRIAD, also co-founder of CREATE BERLIN and DENKBANK, studied Literature, Psychology, Film and Journalism and is a member of the Art Directors' Club Deutschland and the SME advisory committee at the Federal Ministry for Economic Affairs and Energy (Deutscher Mittelstandsbeirat).

Janjaap Ruijsenaars

The renowned architect - who has been teaching at the Royal Institute of Dutch Architects, the Academy of Architecture Amsterdam and the Academy of Architecture Rotterdam - founded Universe Architecture in 2000, which works in the fields of Urbanism, Architecture, Design and Research. He was educated at Western State College of Colorado, Universidad Polytechnica Barcelona Spain and TU Delft, Netherlands.

Françoise Le Crom

The Director of CSR Studies (corporate social responsibility) at Vivendi since 2006 is in charge of the coordination of the non-financial reporting and the audit work, the management of rating agencies and investors' questionnaires and the follow-up of the legal evolution of RSE stakes (recognised seasonal employer) of the group. Previously, she was in charge of the legal department of the telecom operators.

Laure Kaltenbach

Managing Director and founding member of the Forum d'Avignon since its creation in 2008, she began her career at Accenture in 1994, where she spent 11 years specialized in finance in the fields of media, telecommunications and internet. She was then Head of the Finance Service in the TF1 Group and Office Manager of economic evaluations and information society for the Prime Minister's Office (DDM). She is board Member of Cartooning for Peace and of the agency for the promotion of overseas cultures.



The European Research Agenda 2016: Cultural and Creative Spillovers

Richard Russell

The Director of Policy and Research of Arts Council England has developed the Digital R&D fund for the arts with Nesta and the Arts & Humanities Research Council, produced a guide for arts and cultural organisations on the economic benefits of arts and culture, and a new online tool designed to bring together cultural data at a local level. Previously, he led cultural regeneration, arts broadcast and creative learning programmes in South East England, worked with a range of arts organisations and funding agencies including Southern Arts, Cleveland Arts, Birmingham City Council, arts centres and festivals throughout England and managed the programme for Birmingham's Year as UK City of Music in 1992.

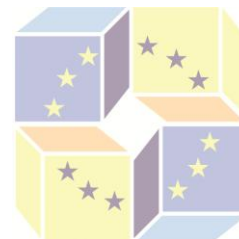
Toby Dennett

The Head of Strategic Development and Artists' Supports of Arts Council Ireland, former public art consultant and committee member of Catalyst Arts, has also been Director of the Sculptors' Society of Ireland. He was a founding Director of the Irish Visual Artists Rights Organisation, which is now collecting and distributing the Artists' Resale Right. He has previously worked for the Arts Council of Northern Ireland, Artworking and Source Photographic Magazine and was originally trained as a visual artist.

As the former Director of Visual Arts Ireland he led the the all island service provider and representative body for professional visual artists. The Artists' Supports Team of the Arts Council is responsible for ensuring that the various funding and other support structures of the Arts Council operate effectively to the benefit of artists of all disciplines.

Funda Celikel Esser

The Policy Analyst at European Commission Joint Research Centre (JRC) in Brussels gained a Bachelor of Science in Business Administration at University of Bilkent in Turkey first, then studied European Social and Economic Policies, Pension Policy and Human Capital Formation in Europe in Twente, Netherlands, before making her Master of Arts at University of Münster in Germany. As a Researcher at the Center for European Policy Studies and Research Specialist for a consulting company she continued her work on fields like Knowledge Management for the Supply Chain and Employee Transformation and the "Economic Integration in the Euro-Mediterranean Region" Project, funded by the European Commission DG Trade. Before working constantly for the JRC in 2014 she was Research Fellow at the Jean Monnet Centre of Excellence at Freie Universitaet Berlin and Research Officer at the European Foundation for the Improvement of Living and Working Conditions.



Dialogue: The European Policy Agenda 2016

Johanna van Antwerpen

The founder and former director of the Amsterdam Innovation Motor (AIM) developed and implemented several cluster projects such as Creative Amsterdam, Creative Metropolises and Cross Innovation. The former director of the Institute of Research and Statistics of the City of Amsterdam (1998-2006) became innovation advisor at AIM/Amsterdam Economic Board in June 2012, which function she combined with her role as coordinator of the European Creative Industries Alliance (ECIA).

Bernd Fesel

Starting his career in the art market and then becoming Managing Director of the German and later of the European Gallery Association he founded the Bureau for Cultural Policy and Economy in 2003, served as advisor f.e. for the German UNESCO Commission as well as for the Federal Foreign Office and organized the 1st national conference on cultural creative industries in Berlin. Since 2009 he was/is senior advisor first at the European Capital of Culture RUHR.2010, then at the European Centre for Creative Economy (ecce) in Dortmund. In 2011 Bernd Fesel was elected chair of ECBN Foundation, Rotterdam.

Axel Ganz

The Vice-President of Forum d'Avignon, Chairman of AG Communication and board member of Bertelsmann started as a journalist, then launched the Prisma-Presse group in France in 1979 - today France's number two in magazines. He has been a member of the Executive Board of the Gruner+Jahr Group for 15 years. During this career he launched about 60 magazines in Europe and is a current member of the Group's Supervisory Board.

Mehjabeen Price

The former UK director of the Stakeholder Forum took lead on all finance and operations functions and assisted the CEO and the BofD of South West Screen from 2005 to 2011 and works now as Chief Operating Officer at Creative England. In this function she is responsible for directing and delivering the company's business activities in accordance with the business plan and objectives established by Creative England's CEO and its Board of Directors.

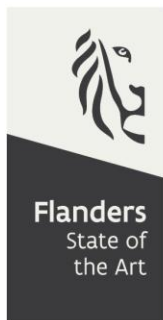


CHAPTER VII.

•

EUROPEAN CREATIVE
BUSINESS NETWORK

The European Creative Business Network (ECBN) is a unique not for profit members foundation which promotes the interests of the cultural and creative industries in Europe since 2011. We represent an alliance of our industry defining members, currently spanning 12 EU countries and growing. Our members and backers include leading national agencies, hubs and intermediaries for the cultural and creative industries on local, regional and/or national level.



THE ECIS WAS FINANCIALLY SUPPORTED BY:



CREATIVWIRTSCHAFT.AT



Ministerium für Familie, Kinder, Jugend, Kultur und Sport des Landes Nordrhein-Westfalen

