



**EUROPEAN**  
**Creative Industries**  
**ALLIANCE**

**create  
innovate  
grow**

**A new policy agenda to maximise the innovative  
contributions of Europe's creative industries**

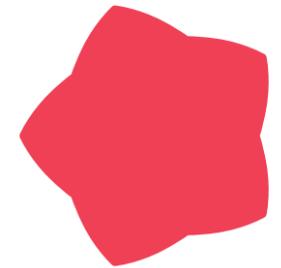
**Recommendations from the Policy Learning Platform  
of the European Creative Industries Alliance**



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**A new policy agenda to maximise the innovative contributions of Europe's creative industries**

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This initiative is financed under the Competitiveness and Innovation Framework Programme (CIP) which aims to encourage the competitiveness of European Enterprises

## About ECIA

The European Creative Industries Alliance (ECIA) is an integrated policy initiative that combines policy learning with eight concrete actions<sup>1</sup> on innovation vouchers, better access to finance and cluster excellence & cooperation (see diagram below for an overview of all individual ECIA projects).

It is an open platform that brings together policymakers and business support practitioners from 28 partner organisations and 12 countries. Its overall aim is to shape a community in Europe that actively supports creative industries as a driver for competitiveness, job creation and structural change by developing and testing better policies and tools for creative industries<sup>2</sup>.

The initiative has been set up by the SMEs Clusters and Emerging Industries unit of the European Commission's Directorate General for Enterprise and Industry under the Competitiveness and Innovation Programme. It started in January 2012 and runs until the end of 2014.

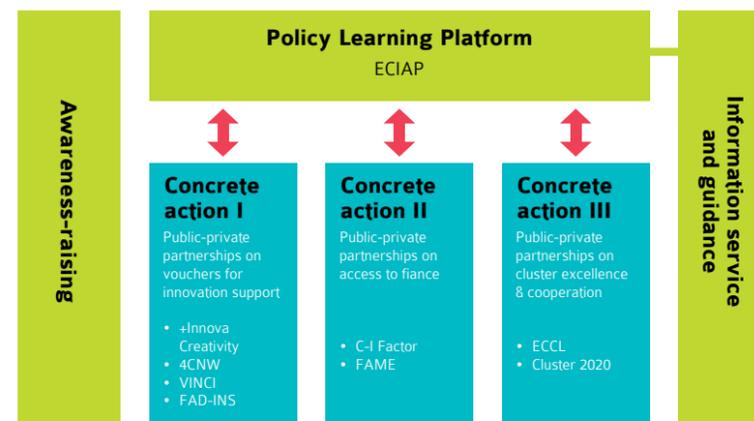
A consortium (ECIAP) consisting of the Amsterdam Economic Board (as coordinator) and the Province of Milan, the Berlin Senate, the ICEC Catalan Institute for the Cultural Companies, the City of Tampere and Nantes Métropole/SAMOA (as committed partners) was selected to drive the work of the European Creative Industries Alliance Policy Learning Platform as founding members.

Rasmus Wiinstedt Tscherning, managing director of CKO, was appointed spokesman of the European Creative Industries Alliance and chairman of its Policy Learning Platform.

More information is available at [www.eciapplatform.eu](http://www.eciapplatform.eu)

The views expressed in this publication, as well as the information included in it, do not necessarily reflect the opinion or position of the European Commission and in no way commit the institution.

November 2014



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## Foreword

The capacity of the creative industries to generate growth, jobs and stimulate innovation in the whole economy is proven and recognized<sup>3</sup>. Many European companies in the creative industries are global leaders and the creative industries have become mass-market global industries that also provide many non-market values to European societies. But SMEs within the creative industries have more difficulty in unlocking the potential for growth and innovation. They also struggle with challenges such as digitisation, protection and exploitation of intangible value, access to finance and business development.

The European Creative Industries Alliance has launched a number of concrete actions that the Policy Learning Platform had considered along with numerous cases, studies and research. The policy recommendations thus build on the work and experiences of Member States and European regions. A number of issues and policy recommendations that can help unlocking the potential of the creative industries for growth and innovation have been considered. This resulted in ten policy recommendations presented here. Several other issues deserve future consideration by policy-makers, including labour market and international trade issues.

These policy recommendations are important and should be a priority among EU Member States, European regions and the EU level. I hope these policy recommendations will support the implementation of policies that will support the cultural and creative industries and their "huge potential to contribute to the transformation of European society, responding to major social, demographical and environmental challenges and leading to a more sustainable and smarter economy with the EU 2020 strategy."<sup>4</sup> New and improved initiatives are necessary as "the combined cultural and economic potential of this dynamic industry still remains largely underestimated and untapped."

It has been a privilege to work with the members of the European Creative Industries Alliance Policy Learning Platform and I commend them for their tireless effort to understand the field and provide benchmark cases and suggestions for policies that will be crucial for the future efforts by the European Union, the Member States and the European regions.

### **Rasmus Wiinstedt Tscherning**

Chairman, European Creative Industries Alliance  
 Founder and CEO, Creative Business Cup  
 Managing Director, CKO – Center for Cultural & Experience Economy

**Creative Hub**



## Executive summary

Proposing readymade solutions to complex challenges is not possible due to national as well as regional differences. Still, European 'best practice' while not being a goal in itself, can serve as a proxy and a starting point for implementing policies. Together with a comprehensive vision and a mid-term plan such tested tools and approaches can form the gateway to further learning, application and success. ECIA has been working both to understand as well as to test the field and is presenting in this report the most suitable benchmark cases and suggestions for policies.

These suggestions for a new creative industries policy agenda are divided into three main fields of action: 1) Stimulate innovation and growth by enabling cross-sectoral collaboration, 2) Build better business support and access to finance in effective regional ecosystems and 3) Measure and raise awareness of the value of the cultural and creative industries as a key driver of innovation and growth.



### Stimulate innovation and growth by enabling cross-sectoral collaboration

Companies in the wider economy need increased incentives to collaborate with creative industries as a driver for innovation and added-value. Creative innovation vouchers and innovation challenges are proposed in this report as effective tools to incentivise experimental behaviour and mitigate risk.

Creative SMEs need a stronger orientation towards business-to-business markets in order to act as a horizontal enabler of added-value. This requires increased professionalisation of creative SMEs including the ability to recognize and respond to innovation challenges in other industries. Hence, brokerage can be a key factor for intermediaries to facilitate successful innovation and long-lasting relations across sectors.

Public-private innovation competitions are proposed as effective tools to develop markets for creative SMEs and allow the public sector to address major public concerns and demands. This should speed up the introduction of innovations in new markets by improving market access for products and services developed by creative teams and companies in the wider economy, and resolve challenges of public interest.



### Build better business support and access to finance in effective regional ecosystems

Creative industries are characterised by market conditions and challenges different from other industries that need to be acknowledged and addressed in public business support schemes.

This report points to so-called "clusters" as a key factor in developing framework conditions for creative SMEs. Professional cluster organisations are often not in place for creative industries – and the existing ones lack the resources to fulfil their potential role. This report proposes that Member States and regions that have good cluster organisations in place should enable them to reach out to other related industries across regional and EU ecosystems. Member States and regions that do not have good cluster organisations in place should investigate whether they have the need for setting up new ones to support networking.

Access to finance for creative industries needs to be addressed from multiple angles. This report proposes that creative SMEs receive better support in developing business skills and become ready for external financing. On the other hand, capital suppliers need increased awareness and understanding of creative industries, including how to evaluate intellectual property (IP) as a core business asset. Last but not least, new and innovative financing schemes should be put in place for the creative industries.



### Measure and raise awareness of the value of the cultural and creative industries as a key driver of innovation and growth

There is no doubt that creative industries play a crucial role in developing quality jobs, innovation and growth in Europe. However, there is a need to measure the impact and dynamics of creative industries more adequately and build evidence of the true value that they generate in all business sectors. This report proposes that a greater effort is made to provide adequate information about creative industries as drivers of innovation and growth in the wider economy.

Furthermore, the report suggests that creative industries need a stronger voice as an industry in order to contribute and benefit from overarching policy strategies for smart, sustainable and inclusive growth. It is proposed that policies are put in place to stimulate incentives for creative sub sectors and intermediaries to join forces and raise a shared advocacy for creative industries as an industry.

This report is accompanied by six thematic papers, which are available at [www.eciaplatform.eu/thematic-reports](http://www.eciaplatform.eu/thematic-reports)

1. Cluster Excellence and Cooperation
2. Cross Innovation
3. Demand Driven Innovation
4. Access to Finance
5. Internationalisation
6. Innovation Vouchers

## List of recommendations

### I

#### Stimulate innovation and growth by enabling cross-sectoral collaboration

- 1 — Introduce creative innovation voucher schemes
- 2 — Stimulate cross-sectoral innovation through public-private innovation challenges

### II

#### Build better business support and access to finance in effective regional ecosystems

- 3 — Test new and review existing business support services and financing schemes
- 4 — Develop and support capacity building in regional clusters
- 5 — Enable and support SME internationalisation efforts
- 6 — Launch new and innovative financing schemes to support creative SMEs
- 7 — Stimulate investments in creative industries through effective regional ecosystems
- 8 — Support new initiatives to achieve better Intellectual Property Valuation for creative SMEs

### III

#### Measure and raise awareness of the value of the cultural and creative industries as a key driver of innovation and growth

- 9 — Map and measure the effects and value of the creative industries in the wider economy
- 10 — Incentivise and support stronger advocacy for cultural and creative industries



**Gaming**



**Fashion &  
technology**

# 1

**Introduction**

## 1.1 Smart, sustainable and inclusive growth

The European Commission's Europe 2020 strategy for smart, sustainable and inclusive growth is focused on stimulating and optimising Europe's economy and thus the wellbeing of its citizens not only now, but also in the future. Considering this major task that the EU has set for itself, Europe is constantly on the lookout for new opportunities and emerging industries that can contribute to reaching its future goals.

In the 2014 Communication 'For a European Industrial Renaissance'<sup>5</sup>, the European Commission highlights creative industries as a leading sector to take the EU out of the economic crisis. This reflects an increasing attention towards the economic benefits of creative industries as a supplement to the cultural and social benefits that have long been widely recognised<sup>6</sup>.

Creative industries represent highly innovative companies with the potential for strong economic impact and a foreseen growth potential as one of Europe's most dynamic sectors. According to the 2010 European Competitiveness Report, they show higher growth rates than average and contribute to around 3% of the EU's GDP. Moreover, they provide quality jobs to around 6.7 million people across the EU, with a significant number of young people<sup>7</sup>.

The strength of creative industries is that their innovative and wealth creating abilities do not stop at the boundaries of their own sector. Beyond their direct contribution to European Gross Domestic Product (GDP), creative industries are drivers of innovation in other growing sectors, including ICT, healthcare, education, urban development and more. In these sectors, creative skills and services are increasingly utilised in order to foster new and

engaging products and services as well as to improving internal operations in organisations.

The cultural and creative industries can be defined in numerous ways and it is easy to get lost in academic discussions on how to classify the various creative sub sectors<sup>8</sup>. While each sub sector is unique in its own right, there are common elements, which are significant enough to justify a global policy approach.

Firstly, creative industries operate within highly dynamic markets. Rapidly shifting consumer trends and new technologies orchestrate a constant demand for innovation in products, services and business models. Furthermore, creative industries mainly rely on intangible assets and immaterial value creation. Navigating a sustainable business under these conditions requires business skills, access to finance and channels to international markets – resources that creative entrepreneurs and SME's do not necessarily possess<sup>9</sup>.

### ...the European Commission highlights creative industries as a leading sector to take the EU out of the economic crisis...

Secondly, and more notably in terms of innovation spill-overs, cultural and creative industries are essentially qualitative. They share a profound specialisation in user engagement powered by unique, experience-based value propositions.

The customer experience is a fundamental measure for all creative products or services, whether it is design, animation, digital media, performing arts or fashion. This brings the creative industries to the forefront of near-market innovation, where the interpretation and facilitation of unique experiences is crucial. This also means that creative industries are capable of generating value-added at the top of value chains, where immaterial

## In fact, almost half of all creative firms (46%) support their customers from the manufacturing industry in introducing innovations.

value, such as design and branding, increasingly determines material value<sup>10</sup>. It is due to their strong capacities for creating experience-based value propositions that the creative industries play a crucial role in reinforcing innovation and growth in other economic sectors. In fact, almost half of all creative firms (46%) support their customers from the manufacturing industry in introducing innovations<sup>11</sup>.

Given these factors, it is essential to develop a systemic perspective that consolidates a creative transfer into the wider economy and stimulates Europe's competitive and industrial wealth<sup>5</sup>. In practical terms, this means to increase the number and the quality of exchanges between creative industries and the wider economy; both on a company-to-company level and between SME intermediaries such as cluster organisations<sup>12</sup>, policy departments etc. Overcoming industrial silos is crucial to fully develop and harvest the innovative contributions of Europe's creative industries.

## 1.2 A new policy agenda

Considering the potential that creative industries have to offer to Europe's economy, the European Creative Industries Alliance was established in 2012 as a part of the "Innovation Union" and the "Industrial Policy" flagship initiatives. The European Creative Industries Alliance is one of the first concrete measures at European level promoting creative industries and their impact on the wider economy. European Creative Industries Alliance's task is to advocate the role of the creative industries as a catalyst for innovation and structural change and to propose new policy instruments that will maximize the innovative contributions of the creative industries to the wider economy. It has also been one of the key actions foreseen in the Council Work Plan for Culture 2011-2014, within the priority area B: cultural and creative industries<sup>13</sup>.

The establishment and actions of the European Creative Industries Alliance take place in the context of work conducted by a range of stakeholders, not least the European Commission's 2010 Green Paper on unlocking the potential of the CCIs<sup>14</sup> and its 2012 follow-up on Promoting cultural and creative sectors for growth and jobs in the EU. It builds on the experience, studies and results of actions under the previous Europe INNOVA and PRO INNO Europe for European practitioners, in particular, the public-private partnerships under the European Knowledge Intensive Services Innovation Platform and the EPISIS INNO-Net. Furthermore, it follows up recommendations from the Expert Panel on Service Innovation in the EU and the Smart Guide to Service Innovation. In addition, it also builds on the results of studies and working groups launched by the Directorate-General for Enterprise and Industry as well as for Education and Culture<sup>15</sup>.

Ultimately, the objective is to acknowledge the need for a paradigm shift at the level of institutions, to develop measures that respond to the emerging transformations in the field of innovation, cultural consumption, and the economy of creative industries.

### 1.3 The approach of the European Creative Industries Alliance

The European Creative Industries Alliance supports the emergence of new value chains and dynamics at the intersection between knowledge, creativity and technology.

The approach of ECIA closely relates to the paradigm of service innovation<sup>16</sup>, emphasising how firms exploit new technologies in order to develop new products and services, new channels to market, new business processes, new organisational structures and new business models. Markets are evolving, new strategic partnerships are developing and previously held concepts, such as the distinction between the manufacturing and service sectors, are being blurred, if not overturned<sup>17</sup>.

The European Creative Industries Alliance aims to provide relevant input to European practitioners in policymaking rather than focussing on the regulatory level. The objective is to test and review new and innovative policy instruments and to formulate concrete recommendations for the European Commission as well as European Member States and regions. On this mission, European 'best practice' is not the goal, but the starting point. The goal is to identify foreseeable challenges that need to be addressed and to identify and test new practices based on the practical experience from concrete actions<sup>18</sup>. Some 3,750 SMEs have benefitted directly from the European Creative Industries Alliance's concrete actions having received customised innovation support such as innovation vouchers, mentoring, training, cross-border match-

making etc. or having participated in workshops and events. In total, the European Creative Industries Alliance has reportedly mobilised €45.8 million directly or indirectly for the creative industries on top of the €6.75 million EU support for the initiative<sup>19</sup>.

### Some 3,750 SMEs have benefitted directly from the ECIA's concrete actions having received customised innovation support...

Proposing readymade solutions to complex challenges is rarely an easy task. This is also true for the European Creative Industries Alliance. The concrete actions of the European Creative Industries Alliance have provided some solutions and recommendations. But not all challenges have been addressed and tested by concrete actions, and moreover, actions might be difficult to transfer from one regional context to another. Some challenges still need further clarification before new solutions can be shaped. Formulating the correct question is sometimes as useful as finding the correct answer. In this case, the purpose of the European Creative Industries Alliance is to propose new and better ways of understanding and approaching the challenge, so that in time, new solutions can be developed and tested on a more informed basis.

### 1.4 The target areas of the European Creative Industries Alliance

Measures to promote the creative industries tap into a broad range of different policy departments that all play a crucial role in developing Europe's cultural and creative industries<sup>20</sup>. While recognising the importance of a full range of policies for creative industries, the European Creative Industries Alliance specifically aims to test new business support measures and provide more favourable conditions for innovation and growth supported by creative SMEs in Europe. This includes both stimulating innovation and growth within the creative industries, and in the wider economy through spill-overs<sup>21</sup>.

### The European Creative Industries Alliance specifically aims to test new business support measures and provide more favourable conditions for innovation and growth supported by creative SMEs in Europe.

The European Creative Industries Alliance does not focus on a range of other issues such as developing creative skills at different educational levels (e.g. lifelong learning), securing better working conditions on the creative labour market, developing a better single market in the EU, constraining digital piracy, promoting a better regulatory environment for intellectual property rights, or revitalising post-industrial and rural territories through strategic use of creative and cultural industries. These are very important issues, but already widely addressed by other departments under the European Commission, for example by the Directorate General for Education and Culture and the Erasmus+

programme, the Directorate General for the Internal Market and Services, the Directorate General for Communications Networks, Content & Technology, the Directorate General for Regional and Urban Policy<sup>22</sup>.

For instance, more than 270 good practices for creative industries policy-making have been identified in the context of different INTERREG IVC projects<sup>23</sup> and ECIA cooperated more closely with some of them.

## 1.5 A multi-layered perspective

The European Creative Industries Alliance intends to make a relevant contribution to the discussions and policy making that is currently taking place across European institutions, Member States and regions. The recommendations target SME intermediaries and policymakers on these three levels, while the ultimate beneficiaries should be SMEs in Europe that strive to innovate and grow by tapping into creative skills and services.

This report builds on a multi-layered perspective covering regional, national and EU/international dimensions<sup>24</sup>. The recommendations of the European Creative Industries Alliance have been formulated with these three levels in mind but recommendations are not provided for each level:

### Regions

Policies for cultural and creative industries have strong local dimensions as favourable environments differ from place to place. Policy and support instruments, therefore, need to be set locally and with long-term plans. The alignment of policy measures with local assets and characteristics determines their success. In the context of the “smart specialisation strategies” that regions have designed, developed and will be implementing, more than 60 regions have chosen cultural and creative industries as one of their priorities. Besides its inherent dynamism and growth potential, creative industries generate positive benefits in the areas, where they are located. Their openness and interaction with other activities determine the extent to which agglomeration and cluster effects add value locally.

### Member States

While local context is the starting point, effective coordination between different policies and administration levels remains essential to success. More and more Member States have put holistic strategies for cultural and creative industries in place. The focus and detail of these strategies vary considerably; yet the promotion and wider use of creative industries are often part of policy strategies for knowledge-based industries.

### EU level

Furthermore, cultural and creative industries are part of global value chains that nourish by crossing regional and national boundaries. The benefits of an international outreach include access to new markets and innovation partners for European companies which is fostering capacities for cross-sectoral linkages and stimulating innovation and growth. The cross-border dynamics of value chains underline the need for action at the EU level – as a means to stimulate innovation and growth among European SMEs<sup>25</sup>, rather than to favour large corporate businesses.

**This report builds on a multi-layered perspective covering regional, national and EU/international dimensions.**

## 1.6 Structure of the report

The report outlines key challenges and presents concrete recommendations for future actions complemented by relevant case studies in three chapters. The relevant case examples do not exclusively build upon the work of ECIA’s concrete actions on innovation vouchers, access to finance and clusters, but do also take into account examples put forward by members of ECIA’s Policy Learning Platform.

### These address:

- I. Stimulate innovation and growth by enabling cross-sector collaboration,
- II. Build better business support and access to finance in effective regional ecosystems, and
- III. Measure and raise awareness of the value of the cultural and creative industries as a key driver of innovation and growth.

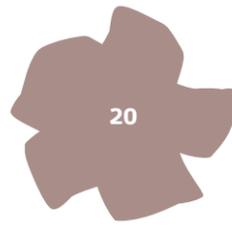
It is important to mention that the three chapters are mutually interlinked and overlapping. In fact, there may be considerable synergies found between the recommendations, when they are seen in coherent policy strategies.



**Art & tourism**

# 2

**Recommendations  
for a new creative  
industries policy  
agenda**



## I Stimulate innovation and growth by enabling cross-sectoral collaboration

In order to develop and harvest the innovative contribution of Europe’s cultural and creative industries, it is crucial to stimulate innovation and growth by enabling cross-sector collaboration and effective regional “ecosystems”. Significant dynamics take place when different sectors meet – both within the creative industries and in the intersection between creative industries and the wider economy.

Transactions of knowledge and skills between creative industries and the wider economy are interesting for two reasons. First, companies in the wider economy, such as SMEs from traditional manufacturing sectors, can gain a competitive edge by adopting creative skills and developing new experience-based value propositions for customers and stakeholders. Second, transactions of knowledge and skills between creative industries and the wider economy contribute to generate new markets, business models and revenue streams for creative service suppliers. This will increase growth and job creation among creative SMEs<sup>26</sup>. Creative services help businesses to sustain their activity, and businesses use creative services in developing competences to drive innovation.

The terms “spillover”, “crossover” and “cross-sectoral innovation” are widely used to describe how creative industries drive innovation and growth in other sectors. The two terms are mutually related but have slightly different meanings: while spillover describes the effects from knowledge transfer between different industries, cross-sectoral innovation refers to managed innovation processes based on interdisciplinary collabo-

ration<sup>27</sup>. For policymakers and intermediaries, spillover is the objective while enabling cross-sectoral innovation is the practical tool.

Cross-sectoral innovation between creative industries and companies in the wider economy need to be encouraged, for which the following three recommendations are proposed:

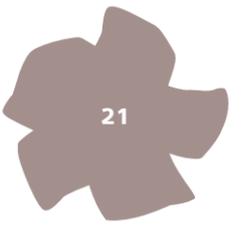
### RECOMMENDATION



#### Introduce creative innovation voucher schemes

Member States and regions should introduce creative innovation voucher schemes in combination with other tools such as match-making as a key component in brokering creative services to the wider economy<sup>28</sup>. Voucher schemes should be kept simple to attract a large number of potential recipients and suppliers. Furthermore, voucher schemes should be considered as part of integrated policies to improve the competitiveness of groups of SMEs rather than a random choice of individual SMEs in isolation and therefore should make use of cluster organisations and other SME intermediaries<sup>29</sup>.

While there has been evidence that creative industries contribute to innovation in the wider economy<sup>30</sup>, most companies are still unaware of the value of acquiring creative skills and services to support their innovation strategy. Innovation vouchers are a suitable tool for providing companies with an incentive to overcome barriers for cooperation horizontally and vertically in the value chains. Innovation vouchers are small lines of credit provided by governments to SMEs to purchase services from providers with a view to introducing innovations (new products, processes or services) in their business operations.



## ...introduce creative innovation voucher schemes in combination with other tools such as matchmaking.

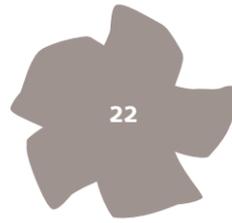
Vouchers give the opportunity to satisfy an innovation-related need, especially in smaller companies that lack extensive budgets for research and development. Innovation vouchers mitigate risk and thereby enable companies to try out new approaches to innovation. Their usage should be focused and for a limited period to tackle specific barriers or opportunities.

Creative SMEs also benefit from innovation vouchers, as they provide an opportunity to explore new business-to-business markets. Business-to-business markets are gaining increasing importance in many creative industries, such as music and games<sup>31</sup>. However, in order to benefit from such opportunities, creative SMEs need to be capable of mapping and identifying challenges, developing services and sales channels that meet the needs and demands of other businesses. Innovation vouchers are an effective tool to stimulate this development and foster capacity building among creative SMEs, especially when they are coupled with matchmaking and brokerage services from qualified intermediaries.

In recent years, there have been several experiences with innovation vouchers across Europe with positive results in terms of increased innovation activities by beneficiaries and strengthened ties between participating organisations.<sup>32</sup> Voucher schemes can vary in scope as well as the conditions for getting them. However, they are generally characterised by flexible and non-bureaucratic voucher schemes that address particular problems and opportunities. Innovation support may become more efficient in all Member States, granting access to the best available innovation experts in a timely manner. Innovation voucher schemes can also be applied at the EU level, given that these have simple and flexible general characteristics.

Because of their limited amount<sup>33</sup>, innovation vouchers can stimulate and address parts of specific challenges. Hence, innovation vouchers are a complement to other business support measures such as business incubators, collaborative research programmes, incentives for internal research & development, clusters and networks for innovation, etc.<sup>34</sup> This means that innovation voucher schemes should be part of a systemic innovation support approach.

**Vouchers give the opportunity to satisfy an innovation-related need.**



## 4CNW Talent voucher scheme

The 4CNW Concrete Action of the European Creative Industries Alliance was a cross-sectoral innovation voucher scheme led by Sligo County Council, Ireland (2012-13) on behalf of the Creative State North West Partnership and with transnational partners in Northern Ireland and Scotland.

The aim of the project was to stimulate innovation in small and micro enterprises, through the use of creative skills and input with the objectives of increasing competitiveness, job creation and growth.

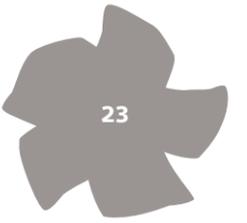
The pilot tested two solutions: Firstly through the allocation of talent vouchers worth up to €5,000 to small and micro enterprises, which allowed these businesses the resources to employ a creative professional to work with them to solve an identified creative challenge within their business. The selection of the most appropriate creative professional was facilitated by the project through a brokered match-making service delivered by regional brokers. This aspect of the project was extremely attractive to SME's with 146 applications for talent vouchers.

The second solution was the creation of a new 'Creative Directory' web app, which currently has 190 accredited creative suppliers profiled (336 applied). The online directory promotes creative micro enterprises in Ireland Northwest, Northern Ireland and Scotland - making it easier for them to find each other for creative collaborations and to be found by businesses in the wider economy.

The project exceeded its targets set in January 2012. It has supported 20 collaborations between creative enterprises and wider business sectors. A voucher fund of €100,000 was available to SMEs in participating regions with an additional €100,000 offered in matched funding by the businesses applying for talent vouchers.

'Brokering Creative Advantage' is the final report on the outcomes of the pilot 4CNW programme. It summarises the benefits and impact of the project and captures the lessons learned, key issues and challenges that have risen. It also proposes a framework and recommendations for future action.

Learn more  
[www.creativestatenorthwest.com](http://www.creativestatenorthwest.com)



## VINCI: Vouchers in Creative Industries

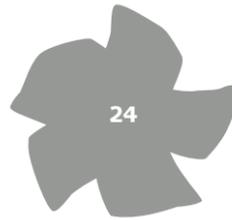
Vinci, a concrete action of ECIA, was a voucher scheme run by Austria Wirtschaftsservice GmbH (aws), the national business support agency of Austria, with the scope of making new connections between creative services and the needs of SMEs in the wider economy.

The region of Salzburg was selected for the pilot due to its high concentration of creative industries, a service oriented economy and the geographical proximity to partner regions in Germany. Eligible creative services were support to idea generation, conception, development or application and implementation to market transition, however most of the projects were related to design and concerned planning and prototyping activities.

The scheme was well promoted and even better received, as there were 71 applications after just one month after the call. Among the 20 voucher beneficiaries, four were creative firms. An amazing 80% of the beneficiaries declared that they would continue working together with the creative service provider in the future.

As already decided in case of success, the scheme was scaled up to a national programme called Kreativwirtschaftsscheck which granted 600 vouchers in the year 2013 (EUR 3 million). Currently, the Kreativwirtschaftsscheck is running for the second time with an amount of 300 vouchers. It is planned to keep the national voucher scheme as a permanent programme with a total of 300 vouchers per year (EUR 1,5 million).

Learn more  
[www.awsg.at/Content.Node/foerderungen\\_alle/kreativwirtschaft/67656.php](http://www.awsg.at/Content.Node/foerderungen_alle/kreativwirtschaft/67656.php)



## Worth Pilot Project

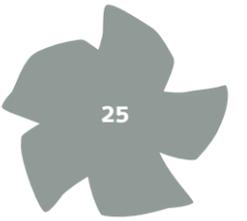
The Worth Pilot project, established outside of ECIA by the European Commission, supports cross-sectoral collaboration in a different manner from innovation vouchers. Launched in 2013 under the Competitiveness and Innovation Programme (CIP) it aims at supporting 30 partnerships between manufacturing companies (SMEs) in the fashion sector and designers. The objective is to boost the fashion industries' competitive standing by supporting innovative and creative solutions.

The Worth Pilot Project will also build and improve links between design and manufacturing throughout the European Union and give impetus to design integration in SMEs. It is the first time the Commission is testing such an approach at the EU level, where the requirement is that the partners have to come from two different countries. The partnerships receive up to €10,000 to develop innovative products, services or processes. Coaching and expert advice is also available through the duration of the collaboration.

First conclusions that can be drawn from two calls for candidates in 2014 are that while designers show a keen interest in collaborating with manufacturing sectors and often put forward clear ideas, manufacturing companies have been less numerous to apply and less clear about what they would like to achieve through the collaboration. These are early indications that manufacturing businesses still do not fully realise the benefits of working with designers and other creative professionals.

Learn more  
[www.worth-project.eu](http://www.worth-project.eu)

Two more ECIA concrete actions on innovation vouchers were executed: Fashion Audiovisual Design Industries Innovation Schemes (FAD-INS) [www.eciaplatform.eu/project/fad-ins/](http://www.eciaplatform.eu/project/fad-ins/) and Redefining Basque Innovation Performance Through Excellent Creative Industry Services (+ Innova Creativity)<sup>35</sup>.



## RECOMMENDATION

**2**

### Stimulate cross-sectoral innovation through public-private innovation challenges

Member States and regional authorities should set up crosscutting innovation challenges. Through innovation challenges, multidisciplinary teams, consisting of creative SMEs and companies in the wider economy, can compete to come up with new solutions for defined challenges. These should tackle key societal issues, such as aging population, as well as experiments in the areas of new consumer demand.

Public-private innovation challenges contribute to the development of markets for creative SMEs and allow the public sector to address major public concerns and demands. The objective should address the general interest, and speed up the introduction of innovations by improving market access for products and services developed in response by creative teams and companies in the wider economy.

Innovation challenges or creativity competitions contribute to the enhancement of human capacity building and knowledge transfer between the multiple operators taking part in each project. Some European Member States have launched comprehensive programmes in order to make better use procurement as a mean to foster innovation in SMEs<sup>36</sup>. In addition to such strategies, public-private innovation might challenge and improve the productivity and effectiveness of public services. They display the added value of creative skills and services in finding solutions for global and local societal issues<sup>37</sup>.

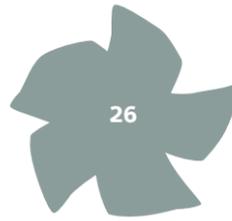
The linkage between innovation challenges and public procurement is mostly related to society's major challenges, where the public sector is the driver of market development. This includes global and long-term issues such

as energy, environment, ICT, social and health care services as well as societal problems specific to a given territory. Every territory and region has particular concerns linked to its specific history, economic development and its population, which call for tailor-made solutions.

Innovation challenges may be coupled with innovation voucher schemes, where the best solutions are rewarded with a voucher to bring the new concept to market. Governments can purchase the developed innovations either on their own or in conjunction with private partners<sup>38</sup>.

Public procurement as a policy measure is not without its pitfalls and needs to be used in conjunction with other measures to stimulate private demand such as awareness campaigns, pre-commercial procurement projects, support of user-focused innovation, etc.<sup>39</sup> It further needs to be complemented with other policy tools, such as developing regional ecosystems through cluster development and support of co-working facilities. The overarching strategy is not only to create a new market, but also to foster new businesses and growth of SMEs towards the development of an industry to serve it.

Innovation challenges or creativity competitions should not always necessarily be set by governments - even though they are the owner of specific problems - but can easily be set by industry. University students and young designers can be used as a resource where the Demola case shows how universities can be engaged in such a process. Although this case is not specifically focussed on creative industries, this model can, however, be used for creative solutions.



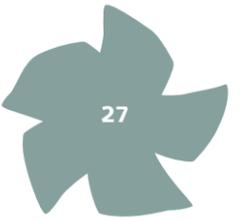
## Demola: Making cross-sectoral innovation work

Demola is an open innovation platform bringing together companies and university student teams. The concept is based on cross-sectoral co-creation, where multidisciplinary student teams work on real life challenges initiated by companies. Prototypes and results produced by the innovation teams can be commercially utilized by the student team itself or/and the company which originally produced the case. The projects are part of the students' curriculum and they also get the ownership of IPR. The companies pay the students a fee based on how pleased they are with the results.

The fundamental idea is to produce commercially viable products or services meeting concrete end-user needs. The strengths of Demola are the real life challenges, the multidisciplinary and multicultural student teams, the well-organised processes and facilitation of the projects, the attractiveness to both companies and the students, the large network around and international applicability of the concept.

The first Demola was launched in Tampere<sup>40</sup>, Finland, in 2008. At present there is an international network of Demolas spread across Tampere, Oulu, Vilnius, Budapest, south Sweden, east Sweden and Maribor. There is a growing interest towards the concept also outside of Europe.

Learn more  
[www.demola.net](http://www.demola.net)



## Supporting creative businesses to grow through access to new markets

Creative England's<sup>41</sup> Interactive Healthcare Fund (£1 million, approximately €1.280.000 million) aims to improve cross-sector collaboration and innovations, and open up practical opportunities for creative businesses to work with business clusters in other sectors e.g. healthcare. Creative businesses working at the cutting edge of their field in mobile technology and app development have the potential to improve the health and wellbeing of patients using the technology we already have at our fingertips. This fund is designed to stimulate creative and digital innovation in UK healthcare and support small creative and digital businesses (SMEs) with innovative concepts or prototypes.

The fund will offer investments (up to £50,000 per application) to support product and prototype development that focus on priority healthcare areas identified by the programme partners, including quality of care, caring for people with dementia, people with long-term condition, and data visualisation. The programme partners include NHS England, Heart of England NHS Foundation Trust, the Greater Manchester Academic Health Science Network and Nominet Trust.

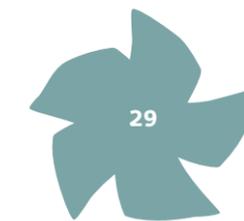
The programme also highlighted the need to improve the procurement process [for creative businesses] when working with large organisations such as NHS England, and resulted in the development of mentoring, matchmaking and peer-to-peer support (i.e. 'NHS Champions' attached to individual projects) for the creative businesses before, during and after the application process.

In Year 1 (2013-14) Creative England invested £335,643 in 10 creative businesses (with individual investments ranging from £5,000 to £50,000), which leveraged a further £300,000 in private investment, created 29 jobs and safeguarded 8, and developed highly innovative products. The first year was so successful that the decision was taken to increase the second round (2014-15) of funding from £350,000 to £750,000.

Learn more  
<http://www.creativeengland.co.uk/story/creative-england-gives-smes-1million-boost-for-digital-healthcare-innovation>



**Industrial design**



## II Build better business support and access to finance in effective regional ecosystems

Cultural and creative industries have been identified as one of the leading sectors to take Europe out of the crisis<sup>42</sup>. Yet, while creative industries drive innovation in other industries, they themselves are equally being transformed and require adequate support to face changes.

Recent studies<sup>43</sup> along with the experience of the European Creative Industries Alliance reveal that creative SMEs deal with a range of challenges in relation to business development, valuation of intellectual property (IP), access to finance and internationalisation. These challenges should be mitigated by better and more customised business support services and financing relevant to creative industries. The objective is to support creative SMEs, enabling them to overcome barriers and seize opportunities for growth.

To achieve better business support for creative SMEs, the following actions are proposed:

### RECOMMENDATION

3

#### Test new and review existing business support services and financing schemes

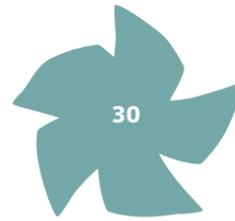
Member States and regions should test new and review their existing business support and financing schemes to examine whether these services are being used by creative industries. If the needs of creative industries are shown to be inadequately addressed, meaning that they do not benefit from these schemes, this should

be seen as a systemic error that needs to be addressed. The European Commission should also contribute to oversee such efforts on policy improvements as part of their country-specific recommendations on the National Reform Programmes to boost growth and jobs.

A key challenge for many creative SMEs with an ambition to grow is that they lack the necessary business skills and preconditions to do so. While they may be capable of establishing and running a micro company, many are not trained to grow the business, attract finance or enter international markets. As a result, cultural and creative industries are renowned for their so-called 'missing middle', indicating the sector's composition of primarily micro firms and a few larger enterprises.

Creative industries are widely characterised by highly dynamic market trends together with a predominance of intangible business assets (e.g. focus on service innovation and intellectual property), limited supply of sector-specialised finance and a low level of investor awareness due to an absence of specific valuation tools, market intelligence and exit strategies. Given these preconditions, it comes as no surprise that many early stage SMEs often need qualified guidance in order to manage their growth.

Business support services are crucial to provide favourable conditions and foster capacity building for SMEs with ambitions to grow. However, experience shows that the general business support system is often unaccustomed to dealing with creative businesses. They are rarely explicitly excluded from existing business support and financing schemes; yet in practice, creatives find no route in these existing services. In other cases, business service providers do not have the necessary insights to provide relevant services for creative SMEs.



Inadequate business support for creative SMEs may result in lost business opportunities. In the worst-case scenario, creative SMEs will not seek further guidance once their initial encounters with business service providers have failed. The objective is not to provide special treatment for creative SMEs, but to provide fair treatment compared to SMEs in established industries.

**Creative SMEs deal with a range of challenges in relation to business development, valuation of intellectual property (IP), access to finance and internationalisation.**

## The characteristics of 'Creative Industry Friendliness'

An important part of the work of ECIA has been to assess existing business support programmes, to ensure that they are fit-for-purpose for use by creative businesses. A toolkit has been developed by ECIA's Cluster 2020 project to identify the defining characteristics of support suitable for creative industries.

Barriers to support for creative industries include: intangible Intellectual Property, volatile turnover, weak balance sheets and lower business skills alongside a lack of assessment tools for support intermediaries to accurately evaluate creative business plans.

'CI Friendly' support programmes will take into account factors such as being jargon free, easy to access, market relevant, flexible, user focused, needs based and usable for a range of business structures, including freelancers.

Learn more  
[www.cluster2020live.eu/creative-industry-friendly-test](http://www.cluster2020live.eu/creative-industry-friendly-test)



### RECOMMENDATION 4

#### Develop and support capacity building in regional clusters

Member States and regions should set up or professionalise cluster organisations and co-working spaces customised for cultural and creative industries and in general strive to help the sustainability of any collaborative initiative emerging at a territorial level. If regional cluster organisations and co-working spaces are already in place, efforts should be made to support their capacity building and professionalisation<sup>44</sup>. One way to do so is by making use of existing European programmes relevant to cluster organisations in creative industries.

The European Creative Industries Alliance points to clusters and effective regional ecosystems as a key driver for capacity building and maturation for growth in creative industries<sup>45</sup>. Cluster organisations are considered as new and highly efficient forms of innovation support that provide or channel specialised and customised business support services, especially to SMEs. Cluster organisations can be defined as the legal entity engineering, steering and managing the clusters, including usually the participation and access to the cluster's premises, facilities and activities.

Cluster organisations can play a crucial role in providing gateways to knowledge, finance, supporting facilities and markets. The European Commission has put in place a Cluster Excellence Programme through the COSME Framework Programme<sup>46</sup>, that builds upon the benchmarking and training material developed under the European Cluster Excellence Initiative. This programme can serve as a resource to increase the professionalisation of SME support services offered by cluster organisations.

Cluster support services are typically designed for specific groups of SMEs, and creative industries should have a lot to benefit from a cluster-driven approach. Bearing this in mind, cluster organisations should play a crucial role in closing the gap between creative SMEs and the mainstream infrastructures for business support. However, it is quite often the case that effective cluster organisations are not yet established within creative industries – and those that do exist are often insufficiently geared to undertake the task. This points to a need for developing both existing and new cluster organisations and enable them to take on a greater role in providing specialised business services for creative industries.

**Cluster organisations are considered as new and highly efficient forms of innovation support that provide or channel specialised and customised business support services, especially to SMEs.**



Cluster ecosystems for creative industries consist of at least three dimensions. First, favourable framework conditions<sup>47</sup> are needed to support the activities of clustering SMEs. Developing effective clusters for creative industries generally does not require advanced research facilities or large-scale infrastructure. Instead, creative SMEs require facilities such as fab-labs, co-creation platforms and co-working spaces<sup>48</sup> incorporating the ideas of co-conception and co-creation in innovation processes. Second, it is crucial to have a critical mass of relevant cluster actors to allow interaction of relevant stakeholders. Third, professional cluster management is essential to support strong interaction and provide excellent and customised business support to companies and other relevant stakeholders<sup>49</sup>.

Cluster organisations and co-working spaces can also facilitate increased involvement of experienced business consultants in creative communities in order for creative SMEs to emerge with new competitive and scalable business models. The work of ECIA demonstrates that creative industries benefit from coaching and training and such activities enable them to become more investment-ready. In this context, such capacity building covers both strategy and specific competences. It is essential that there is a match between the supply of skills and the demands of the capital supply chain, so that creative SMEs can access finance on equal terms to the rest of the economy.

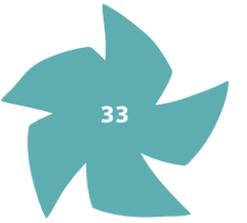
## Cluster 2020

Cluster 2020, a concrete action of ECIA, has studied the best approaches to coworking, by comparing the top 15 coworking centres around Europe. The report 'Excellence in Coworking Practice: how to deliver the best creative coworking experience' includes 200 photographs and detailed practical advice for cluster managers.

Learn more  
[www.cluster2020live.eu/  
better-practice-coworking/](http://www.cluster2020live.eu/better-practice-coworking/)

A guide to running creative incubators has also been published, 'Best Incubation Practices aimed at Supporting Creative & Digital Businesses', which is based around detailed interviews with eight leading creative incubators around Europe.

Learn more  
[www.cluster2020live.eu/  
incubation-report](http://www.cluster2020live.eu/incubation-report)



## Creative camps and exploring spillovers into experience based industries

New training methodologies and new ways of participating in networks and clusters were devised and piloted under the ECIA's concrete action European Creative Cluster Lab (ECCL). ECCL fostered inter creative cluster cooperation and cross-sectorial knowledge spillover - regionally and internationally. ECCL is the think tank and beta site for new approaches and processes for creative cluster management in creative and traditional industries in Europe and particularly encouraged links between creative industries and traditional economic sectors to stimulate joint innovation activities. The Catalan touristic sector showed a solid potential for matching CCI characteristics, with new methodologies for effective cross-sectors linkages being proposed and tested.

The project devised and piloted new training methodologies, presented new ways of participating in networks and clusters and organised creative camps and study visits. Moreover, ECCL organised creative camps and study visits as well as fostered interviews, surveys, comparative analyses, staff exchanges among clusters, incubation/co-working events and pilot activities in the first 30 months of the project.

A creative cluster manager peer learning group, two other pilot trainings, and other important findings and methodologies on creative cluster management have been presented.

Follow the projects activities on social media  
[www.facebook.com/creativeclusterlab](http://www.facebook.com/creativeclusterlab)  
[www.twitter.com/ECIA\\_ECCL](http://www.twitter.com/ECIA_ECCL)



## The European Cluster Excellence Initiative

The European Commission has, independently of ECIA, launched a number of cluster related projects and initiatives aiming at the improvement of cluster policy within Europe and improving the efficiency of existing efforts in cluster management. Started in September 2009, the European Cluster Excellence Initiative – constitutes a central pillar within this approach with 599 clusters from 35 countries having undertaken a benchmarking and obtained a label for cluster Excellence. Learn more: [www.cluster-excellence.eu](http://www.cluster-excellence.eu)

The ECEI framework was utilised in the ECCL (European Creative Cluster Lab) project for benchmarking interviews to assess the applicability of the ECEI indicators for cluster management/ cluster initiatives in creative industries in four different countries (France, Germany, Poland and Belgium).

ECCL concludes that every aspect of work as a cluster manager in creative industries is covered by the ECEI indicators. However, many indicators are based on technological innovation which in turn is based on systematic R&D. In the field of creative industries it is not so easy to isolate R&D activities from the whole innovation process. Another challenge for the application of the ECEI indicators to creative industries is the fact that a lot of people work freelance and should not be categorised as companies, but rather as a separate category. The ECCL project includes these specific attributes in the methodology of the ECEI benchmarking interviews.

Learn more  
[www.cluster-analysis.org](http://www.cluster-analysis.org)

And ECCL  
[www.eciaplatform.eu/project/eccl](http://www.eciaplatform.eu/project/eccl)



### RECOMMENDATION 5

#### Enable and support SME internationalisation efforts

Member States, regions and the European Union should offer funding for SME internationalisation efforts to channel through cluster organisations dedicated programmes that inspire and support cluster organisations to initiate and reinforce internationalisation strategies<sup>50</sup>. Internationalisation strategies should include cross-border and cross-sectoral partnerships between cluster organisations, and thereby, support their creative SME's positions in global value chains. To leverage cluster partnerships, cluster organisations should join forces and establish a European Strategic Cluster Partnership for creative industries and make better use of the European Cluster Collaboration Platform for creative industries<sup>51</sup>. Such a partnership could be set up with funding through the Cluster Internationalisation Programme for SMEs under COSME.

There is an increasing awareness of the strengths and weaknesses of European creative SMEs on global markets and the challenges and opportunities in boosting exports and internationalisation efforts<sup>52</sup>.

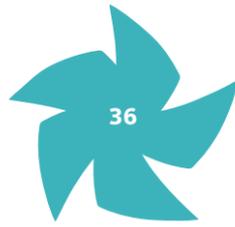
Cluster organisations and effective regional ecosystems play a crucial role in exports and internationalisation for creative industries<sup>53</sup>. Cultural and creative industries are generally more internationally oriented than other industries, and Europe is a leading global exporter of creative industry products<sup>54</sup>. Evidence also shows that cluster organisations in other sectors have become increasingly important for internationalisation processes<sup>55</sup>.

Cluster dynamics for innovation and growth are not limited to the cluster as a geographical or location bound entity. Clusters may also evolve as industry networks based on value chains with the potential to enable transforma-

tive innovation across a range of sectors. This is widely recognised within the ICT sector that has undoubtedly influenced just about every other business sector. This transversal role should also be recognised in relation to creative industries, given their strong capacities for cross-sectoral innovation. In a broad sense, there is a need to facilitate and support effective regional ecosystems, both to provide relevant business support services for creative SMEs and in order to facilitate community building between creative industries and other stakeholders along the value chain.

European Strategic Cluster Partnerships<sup>56</sup> are a key measure to link expertise, service suppliers, distribution channels and financing infrastructures on a transnational level, which in the end enable regional ecosystems to nourish each other and grow into multi-regional hubs based on cross-sectoral specialisations. Hence, strategic cluster partnerships may also lead to cross-sectoral collaboration by following value chains as a guideline for innovation.

Spillovers between creative specialisations may lead to new products and services that fulfil the consumer demand for new experiences. A classic example is the music video that was born in the intersection between the music and TV industry while acquiring skills from the film industry. A more recent example is found in computer games, which are increasingly used in other business sectors as a tool for communication and learning, and as an attractive channel for promoting, distributing and selling products from other creative industries such as films, toys, music, literature etc. Crosscutting business models and value chain innovations lead to increased scalability for creative SMEs, which again lead to increased attraction for investors, internationalisation and growth<sup>57</sup>.



Bearing these dynamics in mind, cluster excellence does indeed involve internationalisation strategies that enable creative SMEs to operate in a global environment, and to reach new markets and value chains worldwide. When creative cluster organisations are pooling resources and co-operating transnationally in the EU, chances are that European creative industries will enjoy a stronger presence on the global scene, as well as contribute to building an attractive European image bridging our excellence in the field of heritage with vibrant cutting-edge creativity.

Strategic cluster partnerships have already been accomplished in many industrial sectors. Experiences from these sectors may serve as inspiration for creative industries. The European Cluster Collaboration Platform<sup>58</sup> has been set up by the European Commission specifically to facilitate transnational collaborations between European clusters. However, only a minority of creative cluster organisations in Europe have currently enlisted to the platform. An evaluation of strategic priorities of cluster organisations has also indicated that internationalisation is in many cases not perceived as high priority among creative cluster organisations<sup>59</sup>.

Even if progress has been made in the recent years, there is still room for improvements when it comes to internationalisation strategies in creative cluster organisations<sup>60</sup>. Over the next few years, it is expected that community building within creative industries in Europe will cross regional and national borders and grow internationally. Hence, strategic cluster partnerships will be a path to nourish and interlink regional ecosystems and stimulate the value chain of innovation, both for the individual company and for the economy as a whole.

## European Cluster Collaboration Platform

The European Cluster Collaboration Platform (ECCP) provides access to information and services that enables better and more targeted interaction between cluster organizations and their members. It was set up by the European Commission, independently of ECIA.

The objective is to improve their performance and increase their competitiveness through the stimulation of European and international cluster cooperation and the forming of European Strategic Cluster Partnerships. In total of 35 European creative cluster organisations are currently enlisted on the European Cluster Collaboration Platform, which hosts a total of 920 such organisations. There is a clear scope in Europe for better organising and more partnering of SME intermediaries in the creative industries.

Learn more  
[www.clustercollaboration.eu](http://www.clustercollaboration.eu)



### RECOMMENDATION 6

#### Launch new and innovative financing schemes to support creative SMEs

Member states, regional and EU authorities should introduce new and innovative forms of financing for creative SMEs. New financing schemes should build on emerging trends such as microcredits, refundable contributions, peer-to-peer lending, crowdfunding, etc. Mitigating risk between public and private financing is an important aspect of new schemes which may have a positive impact on the general professionalisation of the sector<sup>61</sup>.

### Creative businesses are often cited as 'more risky', but this is largely a false assumption.

Access to finance has been widely identified as a key barrier to growth in the creative industries<sup>62</sup>. Thus, access to finance should be addressed as a key measure to develop better business support for creative SMEs. Creative industries form a crucial resource for Europe's development in terms of jobs, innovation and growth. Public seed capital should contribute to further develop these industries. Creative businesses are often cited as 'more risky', but this is largely a false assumption<sup>63</sup>. Certain risk factors can be diminished. Banks and financiers want confidence when they provide finance: confidence in the management team, the company's track record and the assurity of meeting projected sales, profit targets and return on investment in the future. By tackling these issues, existing funding and new innovative financing schemes can provide more effective solutions for creative industries.

One of the main questions when approaching access to finance is whether to focus on generic or tailor-made financing schemes for creative industries. It has been reported that generic financial schemes, addressed to all types of industries, such as guarantee schemes, are lacking visibility and beneficiaries among creative SMEs<sup>64</sup>. This indicates a need to increase creative SME's attention towards the generic financial support schemes, while at the same time making generic schemes more suitable for creative industries by the use of intermediaries or by a more-targeted labelling and marketing campaigns.

There is no one-size-fits-all answer to the question whether to focus on generic or tailor-made financing schemes for creative industries. In some contexts, generic financing schemes may offer the best solution, while in other contexts, tailor-made schemes are more appropriate depending on previous efforts and regional specificities.

As a general guideline however, the most developed creative SMEs have largely the same financing needs as developed SMEs in other sectors, since they face similar problems, similar profitability and similar financial health than SMEs from other sectors. As a consequence, it does not appear necessary to provide tailor-made financing schemes towards the most developed segments of creative SMEs<sup>65</sup>. Instead, there may be a need to increase the visibility of these schemes for creative industries. In some cases, schemes should be slightly modified using testing and review, as mentioned in recommendation 3.

The majority of creative SMEs do not find a route in generic financing schemes<sup>66</sup>. This is not due to a lack of ambition, but because the general market intelligence in their economic space is relatively low<sup>67</sup>. As a result, creative SMEs often turn to private banks when seeking finance. However, experience shows



that the banks are most likely to turn them down. Once again, track record and assurity of a positive cash flow is the problem. This causes a need for the public sector to provide leverage instruments in order to develop and enable creative SMEs for future growth.

New financial instruments should be implemented, building on new emerging financing schemes such as microcredits, repayable contributions, peer-to-peer lending, crowdfunding, etc.<sup>68</sup> The strand of Creative Europe<sup>69</sup>, which includes a new financial guarantee facility (to be implemented as from 2016), is highly welcomed as a targeted instrument which will facilitate the access to finance for cultural and creative sectors SMEs. The capacity building scheme, embedded into a guarantee facility will target the limited expertise amongst the financial institutions in dealing with sectors specificities, enabling banks to develop specific skills in credit assessment of the SMEs in the cultural and creative sectors or valuing the IPR. This could lead to development of similar schemes at the regional level, resulting in becoming financially sustainable, and, on a longer term, become more attractive for private investors.

It is widely acknowledged that crowdfunding needs to be taken into consideration by the public sector<sup>70</sup>. While cooperation of public bodies with crowdfunding platforms should be explored, there is also a need to install a coherent European framework which would promote and develop preconditions for crowdfunding initiatives, including equity-based crowdfunding platforms. The Directorate General Internal Market and Services of the European Commission is currently exploring the potential and the risks of this relatively new and growing form of finance, as well as the national legal frameworks applicable to it, in order to identify whether there is value added in European level policy action in this field<sup>71</sup>. Although not exclusively in the creative industries, the European programme COSME supports better access to finance for SMEs, through loan guarantee and equity.

## Repayable Contributions

Repayable Contributions is a new tool for project finance in the cultural and creative sectors launched by the ICEC Catalan Institute for the Cultural Companies<sup>72</sup>.

The programme is designed to shift the companies' mentality from a subsidy dependency to a shared risk attitude between the public and private sector. It aims thereby at improving competitiveness and financial sustainability among companies in the cultural and creative sector.

Repayable contributions provide financial support to cultural companies so that they can move forward with their projects, provided these are market oriented. They offer funding based on company risk and do not make provision from charging interests. On successful projects, the ICEC recovers a proportion of the amount granted. In its first four years of operation, the repayable contribution scheme has:

- Reached nearly 6 million EUR in grants in 2013, up from approximately 2 million EUR granted in 2009.
- Almost doubled the number of beneficiaries and investments in 2013 compared to 2012.
- Produced an overall return percentage of 89% of the closed cases.

Learn more  
[www20.gencat.cat/docs/CulturaDepartament/ICIC/Documents/Arxiu%20ICIC/ICEC\\_2012\\_ANG.pdf](http://www20.gencat.cat/docs/CulturaDepartament/ICIC/Documents/Arxiu%20ICIC/ICEC_2012_ANG.pdf)  
 page 18



## Growth support of Creative Businesses through repayable loans

Creative England's<sup>73</sup> innovative Creative Business Loan programme offers interest free business loans of up to £150,000 to support creative and digital businesses across the English regions. The Fund totals £3.5million (to-date) and has been running annually since July 2012 – the first two loan funds were so successful and heavily over-subscribed that the decision was taken to increase the third round of loan funding from £1,000,000 to £1,500,000.

- July 2012 - £1million Loan Fund. Outputs: 12 businesses supported/ products developed, 78 jobs created/ safeguarded (to-date)
- July 2013 - £1million Loan Fund. Outputs: 12 businesses supported/ products developed, 60 jobs created/ safeguarded (to-date)
- June 2014 - £1.5million Loan Fund. Applications on-going.

The Creative England Business Loans are for small to medium-sized companies outside of London looking to develop new products, including software, applications and content for Cross Platform TV development; Healthcare; Government Services; Games and Interactive Entertainment; Business To Business; E-Learning and Mobile applications.

Creative England offers interest free loans of between £60,000 and £150,000 per application, which is matched 50/50 with the company sharing the development costs. It supports companies who are experiencing difficulties in accessing finance due to high levels of risk or uncertainty around the outcome of projects. It is targeted at companies with demonstrable high-growth potential which want to make a step-change in their development.

The Creative England Business Loan is supported by the UK Government Department for Business, Innovation and Skills through its Regional Growth Fund (RGF). The objective is to promote economic growth by providing secured interest-free loans whilst also creating a sustainable (and rolling) investment fund to support creative and digital SMEs.

Learn more  
[www.creativeengland.co.uk/business/business-loans](http://www.creativeengland.co.uk/business/business-loans)

Case  
[www.creativeengland.co.uk/story/interview-the-floow-ceo-and-co-founder-aldo-monteforte](http://www.creativeengland.co.uk/story/interview-the-floow-ceo-and-co-founder-aldo-monteforte)



## The world's first regional and public crowdfunding platform

NORDSTARTER is a public owned crowdfunding platform established by the City of Hamburg (Hamburg Kreativ Gesellschaft<sup>74</sup>) in autumn 2011. Stakeholders within the creative industries present their projects online, promote their cause in a campaign and convince the crowd to support them financially in order to realize their ideas. Therefore, the platform is not only a tool to gain access to finance, but also a way to raise attention to their projects.

Hamburg Kreativ Gesellschaft operates Nordstarter and offers a wide range of services connected to the platform: consultancy, crowdfunding workshops, crowdfunding events, promotion and special formats in cooperation with other public and private institutions in Hamburg in order to draw attention to the innovative projects of creative industries. Projects on Nordstarter have a high success rate compared to other platforms and the projects profit from the high visibility they enjoy thanks to joint efforts of promotion.

Founded in November 2011, Nordstarter has since been able to fund 113 great projects with about 700.000 Euros via the crowd. The success rate in 2014 was 62%. Nordstarter project initiators claim that they not only achieved finance and drew attention to their projects, but also networked offline and created a community around their enterprise. They are on the right track to let their business flourish!

Learn more  
[www.nordstarter.org](http://www.nordstarter.org)



### RECOMMENDATION

7

#### Stimulate investments in creative industries through effective regional ecosystems

Member States and regional/local authorities should encourage private investors to invest in early stage creative SMEs by facilitating community building between specialised creative clusters in effective regional ecosystems and early stage investors.

Early stage investments in creative industries generally constitute an unknown territory for private investors. While some creative sub-sectors, such as the games industry, have seen a growing interest in recent years from early stage private investors, other creative sectors are lacking a similar interest.

Investors are often biased by the myth of 'the creative mind' as one who is not commercially minded and unprofessional in business contexts. The myths are many while they are rarely confirmed in practice<sup>75</sup>. For example, business models in creative industries are often conceived by investors as being inherently risky, while evidence in the UK does not show notably higher failure rates for new business start-ups in creative industries compared to start-ups in the wider economy<sup>76</sup>.

### These factors point to the need to facilitate regional matchmaking and community building between creative clusters and investors.

A low level of market intelligence combined with a general lack of investor awareness is causing a low frequency of private investors with a specialisation and proven track record in creative industries. This issue permeates the

entire food chain of private capital, which in the end is causing diminished exit opportunities for early stage investors. Since early stage investors are relying on a certain level of interest from potential buyers at a later stage, they will not invest if this general interest is not detected.

Developing effective ecosystems led by professional cluster organisations can potentially have a significant impact on stimulating private investments in creative industries. Effective clusters are known to accumulate sector experience and knowhow, which is much needed to encourage investment in the creative industries. Early stage investors normally bring knowledge and mentoring to the companies along with the investment – a very important aspect leading to a lower failure rate.

These factors point to the need to facilitate regional matchmaking and community building between creative clusters and investors. The task of cluster organisations and other intermediaries is not only to prepare creative SMEs to meet investors, but also to prepare the investors to assess, evaluate and fully understand the creative SMEs. Without this precondition, it will be hard to generate a mutual understanding and trust, which is an essential requirement for enhancing access to finance for creative industries.

Facilitating community building between specialised creative clusters in effective regional ecosystems and early stage investors fosters and increases the level of "smart financing", where capital is coupled with expertise and access to distribution channels, value chains, target customers etc. Cluster organisations and other SME intermediaries with similar specialisations should collaborate on a cross-border level in order to make connections between specialised knowledge and capital and thereby accumulate more available financing for creative SMEs. This will



eventually lead to new and reliable methods for the valuation of creative SMEs. It will also help SMEs teach themselves how to scale their business through private venture capital.

Community building in regional ecosystems may also serve as a tool to stimulate cross-sector fertilisation by bringing together creative SMEs with stakeholders in other sectors. In particular, there is a need to

emphasize the overlap between creative industries and the ICT sector. Studies have demonstrated that a large majority of all investors claim to invest in ICT-based companies. Hence, a high level of ICT integration across the creative sector would increase investor's awareness towards creative industries and provide more space for experimentation, innovation and growth.

## The Venture Capital (VC) Fonds Kreativwirtschaft Berlin

Creative industries play a vital role in Berlin<sup>77</sup>. Producers of movies and music, fashion design, advertisements, games, publishers, artists and architects have all become economically important for the capital city. VC Fonds Kreativwirtschaft Berlin GmbH aims to support Berlin-based SMEs from the creative industries by providing equity capital.

VC Fonds Kreativwirtschaft is a joint initiative of Investitionsbank Berlin (IBB) and the State of Berlin which was launched in 2008. It has a volume of 30 million EUR and is partially backed by the European Union's European Regional Development Fund (ERDF). The limit per investment in a company is 3 million EUR. VC Fonds Kreativwirtschaft covers a maximum of 50% of a financing round. The rest is backed by private co-investors.

The VC Fonds maintains close ties with all relevant cluster organizations, intermediaries, and other players in the local ecosystem of creative industries. This allows the fund to identify promising potential new investment opportunities and to anticipate market trends with growth opportunities.

The VC Fonds Kreativwirtschaft has leveraged around 200 million EUR from private investors and has so far invested in 37 Berlin-based companies from all creative industry sectors in Berlin. The VC investment team takes an active approach in managing investments and working closely with the company's management, often adding further value by mentoring, coaching, and taking active roles in facilities such as advisory boards.

Learn more  
[www.ibb-bet.de/vc\\_fonds\\_kreativ.0.html?&L=1](http://www.ibb-bet.de/vc_fonds_kreativ.0.html?&L=1)



## Creative Business Cup (CBC) – helping creative entrepreneurs grow their business globally

CBC<sup>78</sup> is a global initiative, network and marketplace supporting entrepreneurs from the creative industry in scaling and growing their business. CBC unleashes the potential for growth among creative entrepreneurs and their contribution to creative and innovative solutions in other industries by providing training, matchmaking and mentoring. CBC started in 2010 as a national competition in Denmark. In 2012 it evolved into a global movement supported by investors, media, organizations, policy-makers, governments and creative entrepreneurs around the world.

CBC supports creative entrepreneurs all-year round and the highlight is the annual World Championships for creative entrepreneurs. Beginning with national competitions, each participating country selects their best creative start-ups. In November, these national champions will compete again against each other at the International Finals in Copenhagen, Denmark for the title of World's Best Creative Entrepreneur. The best creative entrepreneurs from participating countries can join the main event, with the best business plans being presented in front of an international investor panel. All entrepreneurs, organizations and policymakers interested in creative entrepreneurship are welcome at the International Finals in Copenhagen to participate in workshops, get inspired, meet investors and attend the Creative Entrepreneurship Conference & Award Show.

CBC also provides an online platform, CBC Connect, for the top five start-ups from each participating country. CBC Connect is an online training and matchmaking platform that promotes and strengthens the business skills of entrepreneurs. It also connects entrepreneurs to investors as well as prepares entrepreneurs before, during, and after the international CBC finals.

CBC has expanded the number of participating countries from 17 countries in 2012 to 60 countries in 2014. More than 3000 start-ups world-wide get help from Creative Business Cup each year to grow their business. A number of participating start-ups from the 2013 Creative Business Cup have been able to:

- increase number of employees
- sign contracts for investments
- find new financial partners
- develop, produce and sell new products
- create international network and enter new markets

For more details about how start-ups in Creative Business Cup have developed after their participation please see [www.creativebusinesscup.com/start-up-results-2013](http://www.creativebusinesscup.com/start-up-results-2013)

Learn more and get involved at [www.creativebusinesscup.com](http://www.creativebusinesscup.com)



## FILAS – an early stage Venture Capital Fund for creative industries

FILAS, the Financial Agency of Lazio Region (Italy)<sup>79</sup>, has a long outstanding role in the Region financing and supporting innovative high-growth potential companies. FILAS has several financial tools customized to the different life cycles of entrepreneurs. In 2002, FILAS designed, launched and implemented the first regional Early Stage Venture Capital fund in Europe financed through structural funds, that focuses on supporting creative industries. Therefore, regional development agencies have a social responsibility in supporting emerging sectors like Creative industries, bridging them toward investors.

The FILAS early stage VC fund was set up with ERDF support (2007-2013) and a budget of € 24 million. The key characteristics of the fund are:

- Average public investment: 50,000 up to 750,000 euro per investment;
- Life time of investments (max. 5 years);
- Minority participation (max. 49.9%);
- Investment only in equity and/or near equity (i.e. convertible bonds) instruments.

The fund only offers co-investment (between 50% up to 70%) with private independent investors (i.e. Business Angels and VC funds).

The co-investment mechanism has a 1:1 leverage effect on private funding and there is a strong collaboration with accelerators and pre-seed funds, i.e. LUISS Enlabs, LVenture. The financed phases are start-up and expansion.

The 1:1 mechanism especially supports startups in Creative Industries through:

- the mitigation of the high risk perception related to the sector: private VCs benefit a prior recovery of capital invested from private funds,
- the equity kicker on profits by returning part of the public profit to the private funds, and
- the scouting and evaluation, as well as governance and exit strategy decisions.

FILAS is partnering with more than 85 private institutions, VCs and Angels and is open to enlarge its network with foreign investors. Since 2011, FILAS has devoted 24 m € for the VC Fund and only in 2013, FILAS has invested 5,9 million € in 4 startups in the creative industries sectors (i.e. fashion & design; creative content & Web TV, digital music, games & gamification and social application for traditional sectors).

Learn more  
[www.filas.it](http://www.filas.it)



## RECOMMENDATION 8

### Support new initiatives to achieve better Intellectual Property Valuation for creative SMEs

The European Commission, Member States and regions should support new initiatives to investigate and define how further actions can be taken to provide better IP valuation for creative SMEs.

The cultural and creative industries are widely characterised by a high dependency on intangible assets and difficulties in protecting intellectual property (IP). IP protection was not a topic foreseen to be addressed, but IP valuation came up in the discussion of ECIA's Policy Learning Platform, as a particular issue related to creative industries' access to finance. Furthermore, the digital shift has disrupted the markets of many creative sectors, creating both new business opportunities and at the same time challenging established business infrastructures.

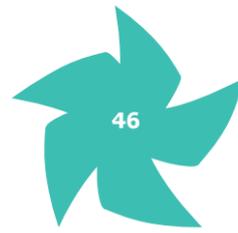
Globally, IP is one of the most valuable, but least-exploited, assets in business. The Gowers Review of Intellectual Property<sup>80</sup> estimated that 70% of a typical company's value lies in its intangible assets, up from 40% in the early 1980s. This is especially true for creative industries and investing in such businesses continues to be seen as inherently risky by the finance community. Venture capitalists are lacking tools and knowhow on valuing and capitalizing on creative IP. Such knowhow and practical experiences should be accumulated. There may also be a role for the public sector to facilitate an increased level of market intelligence.

Creative businesses face two major challenges in accessing the finance that they need to grow.

First, information on available funding and financing options is often fragmented and hard to navigate, with management teams lacking experience on how to position themselves appropriately. Hence, there is a need for further exploration on which methodologies might prove useful to overcome this challenge. Various efforts so far do not seem to have solved the challenge. The public sector could play a role here in terms of providing more adequate business support.

Second, the business models of creative businesses are not always readily understood by investors and lenders and there is an identified lack of understanding of the opportunities for investment in the creative sector and how to evaluate them. Banks report difficulties in assessing the risks associated with lending to businesses whose main assets are IP-based, yet often not held in traditional forms of IP or patents. Some large lenders have specialist teams focused on the creative sectors, but this expertise is typically centralised in headquarters and its impact not felt locally.

Among equity investors, willingness to invest is dampened by an absence of data and market intelligence that would illustrate the nature of growth opportunities and facilitate comparisons between the attractiveness of potential investments. Across the sector, there is a lack of existing case studies on successful growth, returns and investor exits, which often form a significant part of the market intelligence used in the due diligence process for deals involving smaller creative companies.



In addition, the current data gap means that potential investors can incur significant costs in gathering information and assessing risks associated with specific opportunities, making small-scale investments in creative companies less attractive.

Public support could help develop and promote a 'toolkit'<sup>81</sup> and framework for more effective evaluation of creative businesses by potential investors. Such a toolkit should contribute to develop better market intelligence e.g. through case studies of successes and returns in order to help the investor communities understanding of the nature of creative industry business models and showcase the value and risk profiles associated with investments and lending in creative industries<sup>82</sup>. Actions could be taken in collaboration with financial services trade bodies to market the new information through their channels and incorporate it into existing industry professional development<sup>83</sup>.

Furthermore, actions could be taken to provide a comprehensive dataset as an annual market intelligence report providing year-on-year tracking of key datasets to illustrate the size and shape of the creative industries, key trends affecting it, and the volume and type of financing used by businesses, based on data submitted anonymously by industry participants (such an initiative would correspond to the actions proposed in chapter 2.3, recommendation 9 and 10).

The way companies make money has fundamentally changed; increasingly, knowledge is power and businesses need to identify and understand its value. The IP then presents a significant opportunity as an asset that can be used by creative business owners to back their own business, particularly through the alternative funding sector.

The issue of assessing IP has also been addressed in the European Commission's framework programme Creative Europe for the period 2014-2020<sup>84</sup>, in particular in its cross-sectoral strand, which includes the Cultural and Creative Sectors Guarantee Facility. The Guarantee Facility is designed to facilitate access to finance for micro, small, and medium sized organisations in the sector, as well as to improve the risk-assessment capacities of participating financial intermediaries. In addition, the strand aims to test new and cross-sector business approaches to funding, distributing, and monetising creation.

It is crucial for the European Investment Bank (EIB) together with key stakeholders to work out the most appropriate assessment models that take into account IP. The implementation of the facility must be accompanied by training programmes for the banks and other intermediaries, what might prove to be a useful tool to build on a common methodology for IP valuation.

**It is crucial for the European Investment Bank (EIB) together with key stakeholders to work out the most appropriate assessment models that take into account IP.**

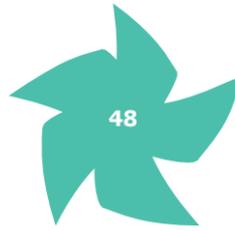


## Training investors, bankers, accountants and entrepreneurs in IP valuation

St'art, an investment fund for creative industries involved in the European project "Wallonia, European Creative District"<sup>85</sup>, has run a two-day pilot training about investment awareness in the creative industries in May 2014. One of the most important and popular modules was on the valuation of intangible assets. The module was a combination of juridical framework of intangible assets, facilitated by two specialized IP lawyers, and the accountancy know-how of an expert with vast experience in practical IP valuation. The training has been certified by the Accountants Institute (I.P.C.F.).

The training, which is a prototype meant to be reproducible, demonstrated that the interaction with creative entrepreneurs is important to discern the complexity of creative sub-sectors and give practical advice for IP valuation. The evaluation of these two days set identified the need for a specific training on IP valuation designed for finance actors and CCI entrepreneurs. Most of the participants came for the module on IP valuation to get tools and wished to have a follow-up and go deeper into the practice of IP valuation. Furthermore, the action leveraged the awareness of the importance of IP valuation among a group of key stakeholders and gatekeepers.<sup>86</sup>

Learn more  
[www.creativewallonia.be/wecd](http://www.creativewallonia.be/wecd)  
[www.start-invest.be](http://www.start-invest.be)



## Discovering IP!

Discover.IP is a project of Austria Wirtschaftsservice (AWS)<sup>87</sup> in cooperation with the Austrian Patent Office (ÖPA). The aim is to help companies recognize their intellectual property (IP), to avoid the undesired loss of know-how and discover how to best use it as a business asset.

Experts of Austria Wirtschaftsservice and the Austrian Patent Office offer personal interviews with company owners and collect relevant information for an optimal utilization of IP for the company, including confidentiality agreements, patents, trades, copyright, cooperation contracts etc. The company finally receives an extensive and customized report containing all the collected information.

Discover.IP is being offered in a modular way; for small companies (up to 49 employees) the service is free of charge. The project is running since 2008 and shows a constant rise in participating projects.

Learn more  
[www.awsg.at](http://www.awsg.at)

## The value of feelings

The Finnish programme 'Feelings – Intangible value creation and experienced value' envisions that in 2030, Finland will be the leading country in business driven by intangibles. The programme is run by Tekes, the Finnish Funding Agency for Innovation. The approach is to challenge companies to look for new ways of doing things and encourage them to better understand the role of customer experiences and feelings as drivers for innovation. The programme also supports the creation of new knowledge networks and unexpected partnerships between creative industries and other companies.

Through the Feelings programme, Tekes provides funding for research, development and innovation projects focusing on the development of intangible value creation. Finnish companies and public research organisations as well as foreign entities registered in Finland are eligible for Tekes funding. The overall budget for the Feelings programme (years 2012-2018) is 100 M€ of which Tekes funding is 50% and the other 50% is company or other private funding.

The programme further encourages companies to exploit their intangible assets better, including brands, reputation and knowledge capital. The programme focuses on SMEs headed for international markets from any industrial sector. The programme also offers funding for academic research in the area of intangible value creation and customer experiences. The programme runs from 2012-2018.

Learn more  
[www.tekes.fi/en/programmes-and-services/tekes-programmes/feelings/](http://www.tekes.fi/en/programmes-and-services/tekes-programmes/feelings/)



**Architecture**



### III Measure and raise awareness of the value of the cultural and creative industries as a key driver of innovation and growth

In order to successfully advocate policies for creative industries on a larger scale, it is necessary to collect and disseminate reliable facts and figures to demonstrate the effects and true value of creative industries in the wider economy. Some efforts have been made to map and measure how creative skills and services can drive innovation in other sectors, but more can be done to develop a better knowledge base for policy making and concrete innovation processes in European companies.

Creative industries need a stronger voice as an industry in order to contribute to and benefit from holistic strategies for smart, sustainable and inclusive growth. Creative subsectors and intermediaries must join forces and raise a shared voice for the industry; just like it is known from other industries such as transportation, eco industries, healthcare, etc.

To measure and raise awareness of the value of creative industries, the following recommendations are proposed:

**Creative subsectors and intermediaries must join forces and raise a shared voice for the industry.**

#### RECOMMENDATION

9

#### Map and measure the effects and value of the creative industries in the wider economy

In order to better showcase the positive effects of creative industries, the European Commission, Member States and regions should launch new studies to map and measure the effects and value-added created by creative transfers to the wider economy. A few studies have already been made<sup>88</sup>, but much more can be done to follow up and provide the evidence that decision makers in companies and organisations require before testing and employing creative skills and services in innovation processes.

As stated in the introduction of this report, it is essential to develop an industrial ecosystem in Europe that enables a creative transfer into the wider economy<sup>89</sup>. Most importantly, this includes increasing the number and quality of transactions between creative industries and the wider economy; both on a business-to-business level and between SME intermediaries such as cluster organisations, policy departments etc. Efforts should be made to establish a common ground for industry stakeholders based on firm evidence of the true value of creative industries<sup>90</sup>.



So far, only a few attempts have been made to map and measure how creative industries contribute to the wider economy. In general, creative industries are well positioned to generate experience-based value propositions to clients and stakeholders. However, this aspect involves many nuances that remain to be investigated. Such nuances include the context of innovation processes that may range from product innovation to service innovation, communication and marketing, human resource development and organisational process etc. Furthermore, it includes the differentiation between different kinds of creative skills and services in innovation processes. While some creative professionals are highly focussed on creative processes, others are more focussed on end-products. Likewise, some creative SMEs are specialised in hosting live audiences (such as performing arts, theatres, live music etc.) while others are specialised in facilitating user-interaction through products and various interfaces (such as digital media, gaming, design etc.). Others are characterised by different specialisations.

Failing to map and measure these nuances of value-adding through creative transfers can in the worst case lead to added scepticism towards creative industries as an enabler of innovation. It is not enough to perceive and promote creative industries as a 'magic bullet' that will automatically drive any kind of innovation in any kind of business context. Hence, providing evidence-based information about the nuances of creative knowledge transfers must be a part of building trust and stimulating incentives to include creative services in innovation strategies across the wider economy.

More consistent data and mapping should be provided, that make use of the definition of the cultural and creative industries, presented in 2012 by the ESS-net CULTURE project (European Statistical System Network on Culture) co-financed by Eurostat<sup>91</sup>.



## Mapping and measuring the value added of the creative industries to the wider economy

The UK's National Endowment for Science technology & the Arts (NESTA)<sup>92</sup> has developed a new way of classifying the UK's creative industries. The study proposes a methodology to define to what extent any occupation can be considered 'creative'. The results highlight just how great an influence the creative industries have across all industries: 'A Dynamic Mapping of the Creative Industries' by Hasan Bakhshi, Alan Freeman & Peter Higgs Jan 2013.

[www.nesta.org.uk/sites/default/files/a\\_dynamic\\_mapping\\_of\\_the\\_creative\\_industries.pdf](http://www.nesta.org.uk/sites/default/files/a_dynamic_mapping_of_the_creative_industries.pdf)

NESTA has published a second paper, focused on the mapping methodology itself: 'Estimating Gross Value Added of the Creative Economy'

[www.nesta.org.uk/sites/default/files/estimating\\_the\\_gva\\_of\\_the\\_creative\\_economy\\_april\\_2013.pdf](http://www.nesta.org.uk/sites/default/files/estimating_the_gva_of_the_creative_economy_april_2013.pdf)

Further reports and surveys that serve to measure and highlight the value and characteristics of creative industries include:

Kreativwirtschaft (2009)  
Third Austrian Report on Creative Industries

KEA (2009)  
The impact of culture on creativity

UNCTAD, Creative Economy Report 2010 and 2008

European Competitiveness Report (2010) which includes a chapter on Innovation and Competitiveness in the European Union

Utrecht School of Arts and others (2010)  
The entrepreneurial dimension of the cultural and creative industries

European Cluster Observatory (2011)  
Priority Sector Report: Creative and cultural industries

European Cluster Observatory (2012),  
Priority Sector Report: An Emerging Industries Report which identified creative industries as an emerging industry. The European Cluster observatory will provide further mapping and cluster trend reports from the end of 2014 onwards.



### RECOMMENDATION 10

#### Incentivise and support stronger advocacy for cultural and creative industries

Member States and regions should support initiatives that enhance joint advocacy for cultural and creative industries. Such initiatives should incentivise creative subsectors to overcome sectoral silos and facilitate collaboration amongst them. The objective is to position creative industries to better contribute to and benefit from holistic growth and innovation strategies. Without a stronger advocacy for creative industries it will remain difficult to develop coherent strategies and identify better solutions for effective policy-making.

Cultural and creative industries consist of a wide range of subsectors, each of which is represented by well-established professional associations. Unfortunately, not much strategic collaboration is seen between the various stakeholders with an overarching perspective for creative industries as an economic sector. In fact, rivalry between subsector stakeholders is more predominant than collaboration – particularly when it comes to political lobbying. Since some creative subsectors traditionally rely heavily on public funds, the individual sector associations are accustomed to compete with each other for funding and they are not always prone to pull in one direction.

**Supporting cultural and creative industries cannot be limited to cultural and enterprise policies, but must tap across policy departments dealing with grand challenges.**

This becomes a challenge when dealing with policymaking. The result is that many policy initiatives are overlapping, while major challenges such as stimulating innovation, building better business support and enhancing access to finance, could be addressed more efficiently through holistic strategies.

While creative subsectors are all unique in their own right, they also share some significant common elements that are important for policymakers to address. First, creative industries are a catalyst for social, cultural and economic change<sup>93</sup>. Second, they are important enablers of quality job creation, exports and growth and hence among the key sectors to take the EU out of economic crisis.

Supporting cultural and creative industries cannot be limited to cultural and enterprise policies, but must tap across policy departments dealing with grand challenges within education, digitization, healthcare, welfare technology, urban development and placemaking, green growth & sustainability, development aid, social inclusion and more. However, in the current landscape, such overarching efforts are still rare. Instead, there is a predominance of subsector stakeholders acting as individual lobbyists, reflecting the lack of comprehensiveness towards supporting measures. By raising a joint voice for the sector, creative industries will be able to make relevant and useful contributions to the various policy departments that are dealing with these societal challenges. Policy makers can stimulate this by requesting a common feed-back or providing incentives for collaborative representation of creative industries in their countries and/or regions, as has been done in the UK, the Netherlands and Hamburg.



## Dutch policies unite Creative Industry Stakeholders

In February 2011 the Dutch government issued a policy document outlining its new enterprise policy. The core of the policy is the Government's plan to make targeted investments, i.e. funding, tax incentives and guarantee schemes, in nine leading (top) sectors of the economy: water, agri-food, horticulture, high-tech, life sciences, chemicals, energy, logistics and creative industries. The idea is to tackle problems hampering growth in these sectors.

The top sector policy supports the cooperation between these different sectors by stimulating crossovers<sup>94</sup>. This is important because societal challenges demand an interdisciplinary approach. A top team has been put together for each sector consisting of: an innovative SME entrepreneur, a scientist, a civil servant, and a standard bearer for the sector.

The Government does not make its own proposals for the sectors, but invites businesses and scientists to draw up action plans. In order to realize this for the creative industries, the government supports the establishment of the Dutch Creative Industries Council (D-CIC). This Council coordinates the implementation of the action plan according to the golden triangle principle (collaboration between the industry, knowledge institutes and the government).

The top team creative industries has issued an agenda focused on strengthening the different disciplines of the creative industries like design, architecture, fashion, gaming, media & entertainment and music. This agenda addresses the following themes:

- knowledge and innovation
- access to finance
- human capital
- internationalization
- crossovers

Learn more  
[www.government.nl/issues/entrepreneurship-and-innovation/investing-in-top-sectors](http://www.government.nl/issues/entrepreneurship-and-innovation/investing-in-top-sectors)



## Giving the UK creative industries a voice at policy level

The UK Creative Industries Council<sup>95</sup> is a joint forum between the creative industries and UK government (the Department of Culture Media and Sport, and the Department of Business, Innovation and Skills). Set up to be a voice for creative industries, the council focusses on areas where there are barriers to growth facing the sector, such as access to finance, skills, export markets, regulation, intellectual property and infrastructure.

Council members are leading industry figureheads drawn from across the UK creative and digital industries including TV, computer games, fashion, music, arts, publishing and film, together with representatives from intermediary agencies. In July 2014 the council launched the UK's first Industrial policy for the Creative Industries.

Learn more  
<http://thecreativeindustries.co.uk/resources/create-uk>

## A joint force for creative industries

In 2009, the City of Hamburg decided to strengthen the creative industries in Hamburg by establishing the public service agency Hamburg Kreativ Gesellschaft, and by encouraging the creative stakeholders in the city to found a common lobby. The City of Hamburg invited stakeholders to first meetings, followed and supported the development of finding the right people and enterprises as well as the ambitious process of combining the different submarkets on one common agenda.

In autumn 2011, the association "Hamburg Hoch 11" was founded as the first lobby organization for creative industries in Germany. Since then, the association is acting as a joint voice for creative industries in Hamburg towards both politicians and the wider industry. Furthermore, Hamburg Hoch 11 is raising awareness for creative industries by introducing and sharing practical experiences on fees, internships, cooperations, questions of law, insurances or social concerns as well as by knowledge exchange. The main focus of Hamburg Hoch 11 is the investigation of the interfaces between sectors and markets to encourage innovation. All members of the association are paying a member fee; in addition the association is financially supported by the City of Hamburg.

Learn more  
[www.hamburghoch11.de](http://www.hamburghoch11.de)



**Design**

## Members of the European Creative Industries Alliance Policy Learning Platform



### Rasmus Wiinstedt Tscherning – Chairman ECIA

Rasmus Wiinstedt Tscherning is the Chairman of the ECIA Policy Learning Platform. He is also, since 2009, Managing Director of CKO – Center for Cultural and Experience Economy, an agency established by the Danish Ministry of Culture and the Ministry of Enterprise & Growth. Founder of Creative Business Cup, the global competition for entrepreneurs from the creative industries, since 2010. Member of the High Level Group for Wallonia European Creative District. Member of advisory board for Copenhagen Business School, Master in Management of Creative Business Processes. Member of the board of the Danish Cultural Institute and Roskilde Business College. In addition to CKO's responsibility to promote entrepreneurship and growth in the creative industries and cross sector innovation, Rasmus is also responsible for several initiatives policy development and financing opportunities for creative businesses. He is a lecturer on the subject "Creative Industries: Business, Innovation and Politics" and lectures internationally in French, English, German and Swedish. Rasmus has 19 years of experience related to the creative industries. He has a MSc in Political Science, but also a creative dna, won as 18 year old a Scandinavian graphic design competition and was in 2009 part of the team of mainly architects that won 1st Prize for the Masterplan for Nordhavnen, a part of Copenhagen.



### Johanna van Antwerpen

Johanna van Antwerpen is the founder of the Amsterdam Innovation Motor (AIM). AIM was the innovation agency of the Amsterdam Metropolitan Area and merged in 2013 among other organisations into the Amsterdam Economic Board. AIM has been set up to help preserve and strengthen Amsterdam's key position in the knowledge based economy. The Amsterdam Economic Board promotes innovation, cooperation and new activities in relevant economic sectors such as: Creative Industries, ICT, Life Sciences, Sustainability, Financial and Business services, Tourism, Logistics, Food & Flowers, Manufacturing.

As director of AIM (2006-2012) she was engaged to establish the creative cluster and developed and implemented several cluster projects such as: Creative Amsterdam, Creative Metropolises and Cross Innovation. She has given many presentations during international seminars on innovation and the creative cluster, e.g. in Brussels, Lyon, Moscow, Helsinki.

Johanna has a background in Social Psychology (MA). During her professional career she was among others manager in Higher Education (1990-1998) and director of the Institute of Research and Statistics of the City of Amsterdam (1998-2006). Since June 2012 she is innovation advisor at AIM/the Amsterdam Economic Board, which function she combines with her role as coordinator of the European Creative Industries Alliance (ECIA).



### Johanna Bolhoven

Johanna Bolhoven holds a position in the ECIA platform on behalf of Creative England. Creative England works to ensure a dynamic, thriving and economically successful future for the Creative Industries outside London. It provides dedicated support to film, television, games and digital & creative services in the England region outside London.

Creative England uses more of a geographical approach rather than a sector specific approach, supporting the Creative Industries in England, outside of London. However, one of their ways of promoting economic success in the Creative Industries is through their new business development unit, which produces workable strategies to support creative and digital SMEs throughout England.

Creative England states that "building a large number of innovative creative partnerships with a host of other business sectors is also paramount at Creative England in order to facilitate economic growth", meaning that they strongly agree that cross-sector collaboration aids effectively in economic growth. Nesta, the UK's foundation for innovation, has also stated that they will support Creative England in its work to ensure that the insights and activities of the Policy Learning Platform have resonance across England and the wider UK.



### Myriam Camarero

Myriam Camarero is a project manager, post-degree in Economics and Master in Analysis and Management of Science and Technology.

She has more than 15 years of experience in managing EU financed projects (Framework Programme, CIP, PRO INNO, Structural Funds), first as responsible of the European RTD projects management unit within the Technology Transfer Office of the University Carlos III of Madrid, and afterwards as local government officer at the Province of Milan, Economic Development Department, with particular focus on support policies to innovation, knowledge exchange and technology transfer, and innovative and creative start-ups.



### Edgar Garcia Casellas

Born in Barcelona, Edgar Garcia obtained his BA in 1994 after a final year at the University of Southampton (UK).

His professional career in the CCIs began on a free-lance basis performing a wide range of tasks, such as manager of an independent theatre company; press assistant for a dance company and a theatre festival; and PR and translator for Catalan film distributing companies. Afterwards he moved on to work for the Sitges International Film Festival of Catalonia.

From 1999 until 2002, he lived and worked in Berlin promoting Catalan culture on behalf of the Catalan Autonomous Government (Generalitat de Catalunya). He returned to Barcelona in 2002 to join the brand new Catalan Institute for Cultural Companies (ICEC), a governmental agency for the promotion of local cultural enterprises, where he is currently director of the Business Development Area.

Amongst his duties are different financing programmes, as well as a consultancy service and the organization of professional training seminars and workshops for the Catalan CCI through the so-called SDE (Business Development Service).

For the last years he has given master classes in several Cultural Management post degree courses in Catalonia, and has spoken as a panellist in different seminars and international meetings (Belfast, Brussels, London, Rio de Janeiro, Edinburgh, Casablanca).



### Chloé Faton

Project Officer of Wallonia European Creative District, Chloé Faton is in charge of the administrative, international and communication dimensions of the project. She has a master degree in European Studies with a specialization in History and Cultures and a bachelor degree in Information and Communication from the Université Libre de Bruxelles. Chloé Faton has also worked for Unesco (Cultural heritage - 2001 Convention), as well as for Carnegie Europe (the European centre of the Carnegie Endowment for International Peace Think Tank) and for the Wallonia-Brussels Delegation based in Hanoi (Vietnam).



### David Furmage

David Furmage combines policy, strategy and European work with consultancy as a media producer and bid-writer. He has a staff role at Coventry University Enterprises leading Cluster 2020, part of the European Creative Industries Alliance's €100m private/public partnership supporting growth in the creative industries. His focus is around developing 'concrete actions' for cluster excellence, business innovation & growth. He also works as a media consultant, producer and bid-writer. This continuing part-time role as a business owner helps David understand sector needs and aspirations in a practical way.

Between 2007-2010 he worked as Policy and Strategy Lead for the Digital & Creative Sector at Advantage West Midlands, the Regional Development Agency (part of the government, since abolished). He had oversight of €20m of funds which enabled the implementation of policies to help digital businesses overcome barriers to growth.

Before 2007, David ran a media production company that evolved from television, and interactive media to learning systems and artificial intelligence. This business went through many stages, including being venture capital backed and having a development team in India as well as the UK.

He started his career working in television, both BBC and ITV, as an editor, working on drama, documentary and news output.



### Zora Jaurova

Zora Jaurova is a dramaturge, producer, art critic, and expert on cultural policies and creative industries.

Jaurova has a MA degree in theatre, and worked as dramaturge on various theatre projects in Slovakia. She was a director of a national agency for EU cultural programmes and a Slovak representative in Cultural Affairs Committee in the Council of EU. For several years she was the vice-president of Culture Action Europe.

She is the co-author of Kosice – European Capital of Culture 2013 project, until May 2011 she was the Artistic Director and Director General of the project.

Jaurova is currently the President of Slovak Creative Industry Forum – a national platform for creative industries. She participates on cultural planning and policies development projects, and projects connecting arts and entrepreneurship and creative industries development. She also works as a film producer.



### Christina Koch

Since 2010 Christina Koch is working as a Project Manager at aws (Austria Wirtschafts-service GmbH) at the department of Creative Industries & Innovation. In this department several funding programs as well as education programs for Creative Industries are being provided and carried out.

Christina is responsible for EU-projects in the Creative sector and is currently the Project Manager of VINCI – Vouchers in Creative Industries. Previously she has worked at the Austrian Embassy in Buenos Aires (Argentina). Christina is a Certified Project Manager (IPMA), holds a Master degree in Sociology and is currently finalizing her Master in International Relations.



### Jenny Kornmacher

Jenny Kornmacher is a communication and project manager at Hamburg Kreativ Gesellschaft, a public agency which supports creative industries in Hamburg, Germany. Kornmacher started working there right after the agency was founded in spring 2010 and is responsible for all public relations and lobbying activities of the agency as well as implementing concrete projects to support creative industries in the Hanseatic City.

Before she started working at Hamburg Kreativ Gesellschaft, Kornmacher was working for the cultural authority of the Southern Swedish region Skåne. There she worked as a project manager for two EU projects focusing on creative industries – one in the Baltic Sea Region and one in the Oresund region. Both projects were involving local authorities as well as universities and were focusing on implementing concrete instruments and activities to support creative industries on a local as well as a transnational level.

Jenny Kornmacher holds a Master of Arts degree in Cultural Sciences from the University of Lüneburg.



### Gertraud Leimüller

Gertraud Leimüller is the elected president of the Creative Industries platform Creativ Wirtschaft Austria, a nation-wide competence centre and platform for Creative Industries – entrepreneurs as well as individuals. Creativ Wirtschaft Austria is embedded in the Austrian Federal Chamber of Economics. Her key areas of expertise are policies to support creative industries, industrial innovation policy, policymaking, and policy assessment.

The Creativ Wirtschaft Austria is a platform that supports the interests of the Austrian Creative Industries, both nationally and internationally at European level, and functions as one of the Austrian Creative Industries linkage with other sectors. Its main objectives are skills development for creative people through concrete services, networking companies and intermediaries; representing the interests of the Creative Industries and advocating for a supportive environment; and providing information and creating awareness, acting as a knowledge hub for Austria and commissioning investigations to study and increase the visibility of the achievements of the Creative Industries.



### Mary McAuliffe

Mary McAuliffe is an Independent Consultant working in Creative Industries Development and Cultural Planning. As former local government employee, Mary has over twenty-five years' experience working in a variety of public service contexts. These include arts policy and programming, cultural planning and creative industries development.

From 1997 to April 2014 she worked with Sligo County Council in the following positions:

- Head of Arts (1997-2007) [www.sligoarts.ie](http://www.sligoarts.ie)
- Project Manager- Greenfort Cultural Regeneration Project (2008-2009)
- Programme Director – Creative State North West PPP (2010-14)

[www.creativestatenorthwest.com](http://www.creativestatenorthwest.com)

In 2012 Mary was assigned as the Coordinator of Sligo County Council's 4CNW Business Innovation Support Programme. In this role she led the development and implementation of 4CNW, one of four concrete actions on innovation vouchers supported by the European Creative Industries Alliance (ECIA). Professional qualifications include an MA in European Cultural Planning from De Montfort University, Leicester UK and a Post-Graduate Diploma in Arts Administration from UCD. She has served as Chairperson of the Contemporary Music Centre, Ireland; as a Board member of Create – Ireland's National Development Agency for Collaborative Arts and as a member of the Irish National Youth Arts Advisory Committee. Mary is a regular contributor to conferences in Ireland and Europe



### Boris Meggiorin

Boris Meggiorin is the Head of International development at the Cluster Quartier de la Création, a service of SAMOA (Redevelopment agency of the West Atlantic urban agglomeration in Nantes, France). The Cluster supports creative industries in Nantes and its region. Boris Meggiorin is responsible for the international relations and lobbying activities of the agency as well as implementing concrete projects to support creative industries in the area. He is specialized on capacity building of artists and creative entrepreneurs.

Before he started working at Nantes' Quartier de la Création, Boris Meggiorin was working as an expert on international relations for TILLT, a company producing artistic interventions in organizations in Gothenburg (Sweden), at the Regional Council of Southern Småland in Växjö (Sweden) and at the Ministry of Culture of the Government of Catalonia in Barcelona. He is lecturer on EU funding at the Master of Cultural cooperation at the University of Barcelona.

Boris Meggiorin holds a Master of Management of EU funding and he is graduated in Politics and Economics of the European Union at the University of Bologna (Italy).



### Michaela Michilli

Michaela Michilli is the Head of "EU Programmes & International Initiatives" Unit in Filas, the Financial Development Agency for the economic development and technological innovation of Lazio Region.

As expert in economics, finance and international markets, she has acquired a long experience in market analysis for the ICT and media, the creative industries and the cultural heritage sectors, collaborating to or leading international projects since 1996.

Ms. Michilli is the coordinator of the European project FAME (Facilitating Access and Mobilisation of European finance for growth of creative industries), a EU CIP co-funded project under the initiative named European Creative Industries Alliance in support of the creative industries.

Within FAME, Ms. Michilli is designing and implementing innovative consultancy, coaching and business services to support European companies in their investment readiness and access to finance. Cross-border investments, equity finance and financial leverage are also main topics and issues to be addressed within FAME.

Ms. Michilli is chairperson of the Enterprise Europe Network Creative industries Sector Group and member of the Think Tank for Creative industry and EBAN.



### Dario Mirabella

Dario Mirabella is a young professional collaborating since 2010 with Toscana Promozione in the field of economic promotion and economic cooperation.

Toscana Promozione is the Economic Promotion Agency of Tuscany, established in 2000 by the local government. Thanks to a network of professional associations, institutions, enterprises, universities and research centers, Toscana Promozione is, today, a concrete platform for overseas enterprises interested in doing business in or with Tuscany.

Dario has a background in International Relations (MA) and a Master in International and Local Development. He has worked also in the field of fair trade (2001-2008) and foreign trade in different economic sectors (2013).

As contact person for CREATE Project, since September 2013 Dario coordinates the working group of CREATE project, whose main aim is to transform the traditional textile district of Prato in a smart, dynamic, sustainable, resilient and inclusive economic system able to be visible and competitive at international level through the spreading of creativity and innovation services in fashion industries.



### Tanja Mühlhans

Tanja Mühlhans (degree in economic science) works since 2001 for the Senate Department for Economics, Technology and Research/ Initiative Project Future in Berlin.

Projekt Zukunft is an initiative by the federal state of Berlin aimed at promoting growth in the fields of ICT, media and the creative industries, which also includes the digital economy sector. Serving as a link between business, science and politics, this project has been working for more than 15 years on improving the framework conditions of companies based in Berlin and is hence supporting their growth and innovative capacity.

Tanja Mühlhans is responsible for the fields film, media, design and fashion. Milestones in her career were Berlin's first creative industries report in 2005, the Unesco certification for Berlin as City of Design in 2006, her role as chairman of the creative industries board on national level since 2008, the successful growth of the Berlin Fashion Week as well as digital/ design/ fashion sector and for example Berlin's new portal for crowdfunding and crowdfunding.

Tanja Muehlhans is involved in the creative economy for more than 10 years, as government officer, business adviser, speaker and freelance consultant. Since 2012 she is project leader responsible for the work package „Cluster Excellence“ within the European Creative Industries Alliance and member of the ECIA Steering Committee.



### Berta Perez

Berta Perez is currently working as European Projects Manager at the Chamber of Commerce of Barcelona, being responsible for the coordination, management and implementation of various projects funded by the European Commission.

Prior to that, she has worked as Innovation Project Manager, with over 3 years of experience enhancing the competitiveness of SMEs through business innovation services. Berta holds a PhD in Chemistry from the University of Erlangen-Nuremberg in Germany and has a Master in Innovation Management from the Open University of Catalonia (UOC).

Berta is the Coordinator of FAD-INS (Fashion, Audiovisual, Design Industries Innovation Schemes), one of eight concrete actions under the European Creative Industries Alliance (ECIA).



### Miguel Rivas

Miguel has an extensive background conducting projects related to strategic planning and change in business clusters, revitalization strategies for urban economies and creative industries. He has been involved with policy decision making -Agency for Innovation and Development of Andalusia and was the CEO of Sevilla Global, urban agency for economic development. Currently Rivas works as an independent consultant and has been partner director of Grupo TASO since 2007.

He is also acting as associate adviser on strategic issues for CLAND, the cluster organization that brings together tractor companies in Andalusia-Spain in the creative-digital and new media sectors.

CLAND is recognized by the main regional bodies supporting the creative cluster as an interface entity towards the creative and digital cluster.

From 2008 -2011 Rivas was the lead expert for Creative Clusters, a network of ten European cities within the URBACT framework dealing with the creative industries and local creative ecosystems. In this capacity, Rivas focused on cross-learning and capitalization.

He has been involved in more than sixty international seminars and conferences as organizer or guest speaker related to spatial economic development, many of them related to the creative industries.



### Ragnar Siil

Ragnar Siil is Managing Partner of the Creativity Lab in Estonia. Before he was undersecretary of State for Fine Arts, Estonian Ministry of Culture. He is also the Chairman of the European Union Expert Group on Cultural and Creative Industries.

Siil has been working at the Estonian Ministry of Culture since 2005. Previously Siil was head of the development department responsible for strategic planning and creative industries policy. He is chairing European Union Expert Group on Cultural and Creative Industries and he is currently member of the European Creative Industries Alliance's Policy Learning Platform.

Previously Siil was Estonian representative in the Steering Committee of Northern Dimension Partnership for Culture and heading Estonian committee of UNESCO Convention on diversity of cultural expressions.



### Jean Schneider

Jean Schneider is the European Projects manager at APCI (Agence pour la Promotion de la Création Industrielle), based in Paris, and an independent designer and consultant. APCI is an association that has been promoting design for more than 30 years.

His work involves driving and managing projects set up with other design promotion and innovation support bodies in Europe, and representing APCI in its European networks. Most of these projects relate to the better integration of design in the economy (and specifically small and medium enterprises wishing to transform) and the society (e.g. by involving local or regional authorities). In 2003 Jean founded an annual European Conference on design policies and design support in Europe. It has now become a regular meeting point for all those who deal with design and innovation support. It is also an informal platform for addressing the European Commission's design and innovation support actions, and networking.

Jean is often asked as a speaker on conferences and chairs round tables on design, design support and innovation. As a former professor at the University of Art and Design Helsinki, Jean is invited to give workshops, seminars and lectures in design schools. His main areas of interest and study are the socio-cultural value of design, design theories, the integration of design attitudes in project management and businesses, and issues related to co-design in the social sphere. His practice concentrates on exhibition design.

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### Tuija Telén

Ms. Tuija Telén is currently working for the City of Tampere, Finland, as the Liaison Director in the Mayor's Office. One of her main responsibilities is the strategic development of the city's economic and innovation policy. She is also currently the chairman of the board of the Tampere Region Economic Development Agency Tredea Ltd.

Tuija Telén holds a Masters degree in Engineering and in her studies she majored in International Marketing as well as in Electrical Engineering. She has work experience from University research and teaching as well as from business development services. In ECIA she has been in charge of Work Package 5: Demand Driven Innovations.

## Thank you!

We would like to thank the following people who have also contributed to the to the final outcome of the European Creative Industries Alliance:

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## References

- 1 Concrete actions on Innovation vouchers: + Innova Creativity, 4CNW, VINCI, FAD-INS [www.eciapplatform.eu/projectcategory/vouchers/](http://www.eciapplatform.eu/projectcategory/vouchers/) Concrete actions on Better access to finance: C-I Factor, FAME [www.eciapplatform.eu/projectcategory/access-to-finance/](http://www.eciapplatform.eu/projectcategory/access-to-finance/) Concrete actions on Cluster Excellence and Cooperation: ECCL, Cluster 2020 [www.eciapplatform.eu/projectcategory/clusters/](http://www.eciapplatform.eu/projectcategory/clusters/)
- 2 Please see footnote 8 for a definition of the creative industries as understood in this report.
- 3 European Commission Communication COM (2010) 183: Unlocking the potential of cultural and creative industries.
- 4 European Commission, The Amsterdam Declaration, March 2010
- 5 European Commission Communication COM (2014) 14: For a European Industrial Renaissance.
- 6 Creative industries are often acclaimed for their great impact on social, democratic and cultural wealth. While recognising these aspects, this report focusses merely on the industrial and economic assets of the creative industries.
- 7 Other sources have estimated it higher at 4.5% of GDP and 8.5 million people employed (TERA Consultants, 2010).
- 8 This report employs the definition presented in 2012 by the ESS-net CULTURE project (European Statistical System Network on Culture) co-financed by Eurostat, which builds on ten domains: Heritage (including museums, historical sites and intangible heritage), Archives, Libraries, Books & Press, Visual arts (including design), Performing arts, Audio-visual & Multimedia (including film, radio, television, and games), Architecture, Advertising, and Arts crafts. It should be noted that recent reports also make close connections with fashion (linked to design) and experience-related sectors such as tourism, sport and recreation. The final ESS-net report: [ec.europa.eu/culture/library/reports/ess-net-report\\_en.pdf](http://ec.europa.eu/culture/library/reports/ess-net-report_en.pdf)
- 9 European Commission Communication COM (2012) 537: Promoting cultural and creative sectors for growth and jobs in the EU.
- 10 See also: Commission Staff Working Document (2009): Design as a driver of user-centered innovation.
- 11 This is shown in the Arge Creativ Wirtschaft Austria (2009): Third Austrian Report on Creative Industries.
- 12 In the European Commission Staff Working Document SEC (2008) 2637, cluster organisations are considered as new and highly efficient forms of innovation support providers that provide or channel specialised and customised business support services, especially to SMEs. Cluster organisations can be defined as the legal entity engineering, steering and managing the clusters, including usually the participation and access to the cluster's premises, facilities and activities.
- 13 See: Council Work Plan for Culture 2011-2014 [eur-lex.europa.eu/legal-content/EN/ALL/ELX\\_SESSIONID=1GnJJ0XYdpWJTG2Zq9GLryftlz7FSGftjfpypB1NbYDnr2rkM!-1749531356?uri=CELEX:42010Y1202\(01\)](http://eur-lex.europa.eu/legal-content/EN/ALL/ELX_SESSIONID=1GnJJ0XYdpWJTG2Zq9GLryftlz7FSGftjfpypB1NbYDnr2rkM!-1749531356?uri=CELEX:42010Y1202(01))
- 14 European Commission Communication COM (2010) 183: Unlocking the potential of cultural and creative industries.
- 15 Including the work of the Open Method of Coordination (OMC) Working Groups of EU Member States' Experts on Cultural and Creative Sectors, that have produced a policy handbook on how to strategically use structural funds to support the CCIs [ec.europa.eu/culture/library/publications/cci-policy-handbook\\_en.pdf](http://ec.europa.eu/culture/library/publications/cci-policy-handbook_en.pdf) (2012) and a good practice report on CCIs' export support and internationalisation strategies [ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies\\_en.pdf](http://ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies_en.pdf) (2014).
- 16 As described in European Commission (2009): Challenges for EU support to innovation in services – fostering new markets and jobs through innovation. The Smart Guide to Service Innovation also offers further information and practical examples at [ec.europa.eu/enterprise/policies/sme/regional-sme-policies/documents/no\\_4\\_service\\_innovation\\_en.pdf](http://ec.europa.eu/enterprise/policies/sme/regional-sme-policies/documents/no_4_service_innovation_en.pdf)
- 17 The cross-sectoral linkages explored by ECIA include the IT sector on mobile solutions, tourism, enhancing online presence for agro food, retail and other sectors, innovative materials and textiles, bringing design and creative solutions in the healthcare and manufacturing sector such as automotive.
- 18 ECIA has launched eight concrete actions on: Innovation vouchers (+Innova Creativity, FAD-INS, 4CNW, VINCI), Access to finance (FAME, C-I Factor) and Cluster excellence & cooperation (Cluster 2020, ECCL). The concrete actions have provided input for the recommendations in this report. Find references to the concrete actions under each recommendation or read about them at: [www.eciapplatform.eu/projectcategory/vouchers/](http://www.eciapplatform.eu/projectcategory/vouchers/) [www.eciapplatform.eu/projectcategory/access-to-finance/](http://www.eciapplatform.eu/projectcategory/access-to-finance/) and [www.eciapplatform.eu/projectcategory/clusters/](http://www.eciapplatform.eu/projectcategory/clusters/)
- 19 European Commission Staff Working Document SEC (2014) 181: "State of the Innovation Union: Taking stock 2010-14".

- 20 European Commission COM (2012): Promoting cultural and creative sectors for growth and jobs in the EU.
- 21 The European Commission Staff Working Document SEC (2009) 1195: "Challenges for EU support to innovation in services – Fostering new markets and jobs through innovation (PROINNOEurope® Paper n° 12)" highlighted that creative industries are an innovative industry where economic activities cluster across Europe. The target areas of ECIA were set by DG Enterprise and Industry following a workshop "Towards a Pan-European initiative in support of innovative creative industries in Europe", organised by the European Commission's Enterprise and Industry Directorate-General in cooperation with the City of Amsterdam, the European Design Centre and the Association of Dutch Designers on 4-5 February 2010 in Amsterdam, The Netherlands.
- 22 Current EU Programmes pointing directly to creative industries include Creative Europe, Horizon2020 and COSME. Other EU programmes may also be of relevance for creative industries both directly and indirectly.
- 23 [www.interreg4c.eu/fileadmin/User.../L4\\_Creative\\_Industries\\_report.pdf](http://www.interreg4c.eu/fileadmin/User.../L4_Creative_Industries_report.pdf)
- 24 It should be noted that EU Member States and regions vary considerably in their political background, industrial landscape, cluster composition etc. This means that the local context for policymaking in European regions and Member States is diverse.
- 25 EU Commission COM (2008): A Small Business Act for Europe.
- 26 See: The 'Cross Innovation Project' supported by INTERREG IVC: [www.cross-innovation.eu](http://www.cross-innovation.eu)
- 27 See: Thematic Paper on Cross sectoral Innovation – Nantes [www.eciapplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Cross-Innovation-Nantes.pdf](http://www.eciapplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Cross-Innovation-Nantes.pdf) and VDI/VDE (2014): Policy recommendations – promotion of cross-innovation from creative industries.
- 28 Initiatives under Horizon2020 for 'Cluster facilitated projects for new industrial value chains' could be used for this purpose.
- 29 See: Thematic Paper on Innovation Vouchers – Milan [www.eciapplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Innovation-vouchers-Milan.pdf](http://www.eciapplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Innovation-vouchers-Milan.pdf)
- 30 Arge Creativ Wirtschaft Austria (2009): Third Austrian report on creative Industries; URBACT II (2012): Creative SpIN – Creative spillovers for innovation; Nesta (2010): Creative clusters and innovation.
- 31 In some creative subsectors, new tendencies towards business-to-business markets are already well developed, especially in those sectors disrupted by digitalisation. In the music industry for example, creative SMEs are increasingly finding new revenue streams by selling musical content and musical brands to other businesses, rather than actually selling music to consumers. Other sectors, especially architecture and design, are inherently accustomed to business-to-business markets.
- 32 As highlighted in the Riga Declaration, see: [www.kvoucher.eu/945/news-documents/news/riga-declaration-realising-the-full-potential-of-innovation-voucher-programmes.html](http://www.kvoucher.eu/945/news-documents/news/riga-declaration-realising-the-full-potential-of-innovation-voucher-programmes.html).
- 33 Innovation vouchers are typically below 5,000 € for consulting services and below 20,000 € for small process or product improvements.
- 34 See OECD's policy handbook on innovation vouchers (2010): [www.oecd.org/innovation/policyplatform/48135973.pdf](http://www.oecd.org/innovation/policyplatform/48135973.pdf)
- 35 FAD INS, see: [www.eciapplatform.eu/project/fad-ins/](http://www.eciapplatform.eu/project/fad-ins/) and see results: [www.eciapplatform.eu/publication/fad-ins-results-and-evaluation/](http://www.eciapplatform.eu/publication/fad-ins-results-and-evaluation/) + Innova Creativity, see: [www.eciapplatform.eu/project/innova-creativity/](http://www.eciapplatform.eu/project/innova-creativity/)
- 36 In Finland, Tekes has launched a programme on "Smart Procurement" with a budget of 60 million EUR. See: [www.tekes.fi/en/programmes-and-services/tekes-programmes/smart-procurement/](http://www.tekes.fi/en/programmes-and-services/tekes-programmes/smart-procurement/)
- 37 See Thematic Paper on Demand Driven Innovation – Tampere [www.eciapplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Demand-driven-innovation-Tampere.pdf](http://www.eciapplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Demand-driven-innovation-Tampere.pdf). Demand orientation places a particular emphasis on the macro perspective, i.e. promoting the innovativeness of markets, while taking advantage of, and steering market demand in a way that encourages innovation. The aim is to improve market conditions so that the introduction and diffusion of innovations is as efficient as possible. This is pursued by facilitating the market entry of new products and services, and by steering public and private demand towards innovative products and services by means of public procurement, regulation etc.
- 38 In the European Union, public procurement accounts for 16 % of GDP. These large procurement volumes provide the public sector with a significant opportunity to have direct influence on demand for innovations by increased use of creative skills and services. Public procurement of innovative goods and services relies on inducing innovation by specifying levels of performance or functionality that are not achievable with 'off-the-shelf' solutions and hence require an innovation to meet the demand.

- 39 For more information on public procurement, see EU COM MARKET (2010): Strategic Use of Public Procurement in Europe - Final Report to the European Commission.
- 40 City of Tampere is one of the founding members of the ECIA Policy Learning Platform.
- 41 Creative England is a partner in one of two ECIA's cluster projects, Cluster 2020.
- 42 European Commission Communication COM (2014) 14: For a European Industrial Renaissance and European Commission Communication COM (2012) 537: Promoting cultural and creative sectors for growth and jobs in the EU.
- 43 [Survey on access to finance for cultural and creative sectors](#), Idea Consult for the European Commission DG EAC (2013) and CKO (2012): What do the creative industries need? [creative2c.info/wp-content/uploads/2013/02/Wiinstedt-Tscherning-Rasmus-and-Boxenbaum-Eva-2012-What-do-the-Creative-Industries-need-Barriers-and-Possibilities-for-Growth-in-the-Creative-Industries-in-Denmark.pdf](#)
- 44 See Thematic Paper on Cluster Excellence and Cooperation - Berlin [www.eciaplatform.eu/wp-content/uploads/2014/08/Thematic-paper-Cluster-Excellence-Berlin.pdf](#)
- 45 Commission Staff Working Document SEC (2008): The concept of clusters and cluster policies and their role for competitiveness and innovation: Main statistical results and lessons learned.
- 46 See [ec.europa.eu/enterprise/contracts-grants/calls-for-proposals/index\\_en.htm](#)
- 47 See European Cluster Observatory: [www.clusterobservatory.eu/index.html](#)
- 48 Fab-labs (fabrication laboratories) are small-scale workshops offering various forms of digital fabrication such as 3D printing. Co-creation platforms provide a fertile breeding ground for collaboration between entrepreneurs, designers and developers and can be facilitated both physically and virtually. Co-working spaces operate like startup campuses providing physical facilities as well as access to finance, mentoring and other services.
- 49 See: Institute for Innovation and Technology, Developing Successful Creative & Cultural Clusters Measuring their outcomes and impacts with new framework tools (October 2012) [www.eciaplatform.eu/wp-content/uploads/2013/03/WP3-Report-Berlin-Excellence-2012.pdf](#)

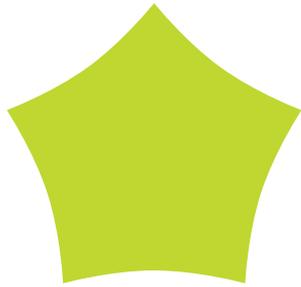
- 50 See Thematic Paper on Internationalisation – Nantes [www.eciaplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Internationalisation-Nantes.pdf](#)
- 51 See: [www.clustercollaboration.eu/](#)
- 52 Open Method of Coordination (OMC) Working Group of EU Member States' Experts on Cultural and Creative Sectors (2014): Good Practice Report on The Cultural and Creative Sectors' Export and Internationalisation Support Strategies, [ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies\\_en.pdf](#)
- 53 EENC, European Expert Network on Culture (2012): Mapping of Cultural and Creative Industry - Export and Internationalisation Strategies in EU Member States.
- 54 European Commission (2010): European Competitiveness Report.
- 55 Meier zu Köcker G., Müller L. and Zombori Z. (2011): European Clusters Go International, VDI/VDE-IT, Berlin, 2012
- 56 See: [www.clustercollaboration.eu](#)
- 57 See: The Cross Innovation Project supported by INTERREG IVC: [www.cross-innovation.eu](#)
- 58 [www.clustercollaboration.eu](#)
- 59 See [www.eciaplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Internationalisation-Nantes.pdf](#). See also: OMC Working Group on Cultural and Creative Sectors' Export and Internationalisation Support Strategies (2014): Good Practice Report [ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies\\_en.pdf](#)
- 60 In a mapping conducted by the European Expert Network on Culture in 2013, experts identified 230 bodies involved in the export and internationalisation strategies of creative industries in all EU member states. Among those 230 bodies very few could be considered as cluster organisations (i.e.: Cland – digital industry cluster in Andalusia; Eiken – Audiovisual Cluster of the Basque Country; ADDICT – Creative industries cluster in Northern Portugal). Most of the identified bodies supporting internationalisation were regional and/or sectoral programmes or internationalisation agencies. See: EENC (2013): Mapping of Cultural and Creative Industry Export and Internationalization Strategies in EU Member States.

- 61 See: Thematic Paper on Access to Finance – Catalonia [www.eciaplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Access-to-Finance-Barcelona1.pdf](#)
- 62 Nesta (2003): Investing in the creative industries.
- 63 Demos (2011): Risky Business: The lazy assumption that the creative industries are inherently risky is harming Britain's path to growth", [www.demos.co.uk/publications/riskybusiness](#)
- 64 See: Thematic Paper on Access to Finance – Catalonia [www.eciaplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Access-to-Finance-Barcelona1.pdf](#)
- 65 Most European capital funds tend to have investment strategies that do not exclude creative industries. Rather on the contrary, they often do invest in developed SMEs in creative industries, however without being conscious of the fact that the companies belong to creative industries as a classification.
- 66 The challenge of access to finance relates closely to capacity building among creative SMEs through better business support. There is evidence that only a minority among creative SMEs has developed a clear business strategy, which is usually necessary in order to attract capital.
- 67 See also: Survey on access to finance for cultural and creative sectors, Idea Consult for the European Commission DG EAC (2013). [ec.europa.eu/culture/library/studies/access-finance\\_en.pdf](#)
- 68 Microcredit addresses the need for access to credit among early stage businesses by offering small loans, usually smaller than €25.000, granted either by institutions specialising in microcredit or by banks. Repayable Contributions are a key tool of public support to project-based creative industries that combines subsidy and loan instruments. Peer-to-peer lending is the practice of lending money to unrelated individuals, or "peers", without going through a traditional financial intermediary such as a bank or other traditional financial institution. Crowdfunding is an emerging alternative form of financing that connects directly those who can give, lend or invest money with those who need financing for a specific project. See also case example on the following page.
- 69 Creative Europe: [ec.europa.eu/culture/opportunities/cross-sector-support/index\\_en.htm](#)
- 70 EU COM (2014): Unleashing the potential of Crowdfunding in the European Union.

- 71 The Commission has recently made a call for applications with a view to selecting members of an Informal Expert Group on crowdfunding named 'The European Crowdfunding Stakeholder Forum' (ECSF). The group will assist the European Commission in developing policies for crowdfunding to flourish while taking into account the interest of contributors.
- 72 ICEC, Catalan Institute for the Cultural Companies is one of the founding members of ECIA's Policy Learning Platform.
- 73 Creative England is a partner in one of the two ECIA cluster projects - Cluster 2020.
- 74 Hamburg Kreativ Gesellschaft is a member of ECIA's Policy Learning Platform.
- 75 CKO (2012): "What do the creative industries need?": The study reveals that SMEs in creative industries in average have longer planning horizons for business development and similar ambitions for growth as SMEs in the wider economy. Also, creative SMEs show a higher level of international orientation compared to SMEs in the wider economy. [creative2c.info/wp-content/uploads/2013/02/Wiinstedt-Tscherning-Rasmus-and-Boxenbaum-Eva-2012-What-do-the-Creative-Industries-need-Barriers-and-Possibilities-for-Growth-in-the-Creative-Industries-in-Denmark.pdf](#)
- 76 According to a Nesta survey from 2004, one third of investors agree that the business models for the creative industries sectors are too risky to be worth investing in. However, previous experience makes a vast difference with just 14 percent of those who have invested previously agreeing with the statement compared to 40 per cent of those with no previous experience. Source: Demos (2011): Risky Business, "The lazy assumption that the creative industries are inherently risky is harming Britain's path to growth".
- 77 Berlin's Government Senate Department for Economics, Technology and Women's Issues is one of the founding members of ECIA's Policy Learning Platform.
- 78 The CEO of the Creative Business Cup (CBC), Rasmus Wiinstedt Tscherning, is chairman of the ECIA Policy Learning Platform. CBC is not a specific ECIA action.
- 79 FILAS, the Financial Agency of Lazio Region, Italy, is coordinator of one of ECIA's two Access to finance projects called FAME.
- 80 HM Treasury, 2006 [www.hm-treasury.gov.uk](#)

- 81  
Tools could be based on those already developed by existing bodies such as UK Intellectual Property Office and piloted with a small number of financial institutions.
- 82  
See: UK Intellectual Property Office (2013): Banking on IP? The role of intellectual property and intangible assets in facilitating business finance.
- 83  
ECIA has not had a Concrete Action specifically addressing this issue. Hence, ECIA cannot draw on concrete experiences and provide specific policy recommendations. Nevertheless, the issue is considered of high importance, and further investigations of potential policies should be made by European policy makers on all levels.
- 84  
See: [ec.europa.eu/culture/index\\_en.htm](http://ec.europa.eu/culture/index_en.htm)
- 85  
Wallonia, European Creative District is a member of ECIA's Policy Learning Platform. The project St'art is not a specific ECIA action.
- 86  
See: IDEA Consult, Wallonia European Creative District project: [www.creative-wallonia.be/projets/wallonia-european-creative-district/our-publications.htm?lng=en](http://www.creative-wallonia.be/projets/wallonia-european-creative-district/our-publications.htm?lng=en)
- 87  
Austria Wirtschaftsservice is a member of ECIA's Policy Learning Platform. The project Discovering IP! is not a specific ECIA action.
- 88  
See Nesta (2008): Creating Innovation: Do the creative industries support innovation in the wider economy and Stoneman, P. (2010): Soft Innovation – economics, product aesthetics & the creative industries and Pratt, Andy C. & Jeffcutt, P. (2009): Creativity, Innovation & the Cultural Economy – snake oil for the twenty-first century and Schiuma, G. (2012): Mapping Arts-Based Initiatives - Assessing the organisational value of the arts.
- 89  
See Paul Rutten and Frank van Oort, Amsterdam Innovation Motor (2011): Creative Industries as a flywheel [www.eciaplatform.eu/publication/creative-industries-as-a-flywheel/](http://www.eciaplatform.eu/publication/creative-industries-as-a-flywheel/) and CKO (2012): What do the creative industries need? [creative2c.info/wp-content/uploads/2013/02/Wiinstedt-Tscherning-Rasmus-and-Boxenbaum-Eva-2012-What-do-the-Creative-Industries-need-Barriers-and-Possibilities-for-Growth-in-the-Creative-Industries-in-Denmark.pdf](http://creative2c.info/wp-content/uploads/2013/02/Wiinstedt-Tscherning-Rasmus-and-Boxenbaum-Eva-2012-What-do-the-Creative-Industries-need-Barriers-and-Possibilities-for-Growth-in-the-Creative-Industries-in-Denmark.pdf)
- 90  
There have been many discussions on how to define creative industries in relation to statistical surveys and academic research. ECIA supports the definition presented by ESS-net CULTURE in 2013 (see footnote 3), while recognising that Member States and regions may apply different variations due to specific local interests.
- 91  
See footnote 8
- 92  
The study of Nesta is not a specific ECIA action.
- 93  
See the European Creative Districts: Wallonia and Tuscany. They are two European regions selected by the European Commission for their exemplary strategy of supporting the creative economy as a driver of economic change. Both initiatives aim to demonstrate how traditional industrial regions can, via policies and support measures for entrepreneurship and innovation, help to create a supportive ecosystem in which entrepreneurs can develop, innovate, grow and internationalize. [www.eciaplatform.eu/project/creative-districts/](http://www.eciaplatform.eu/project/creative-districts/)
- 94  
The Dutch public private organisation Amsterdam Economic Board is one of the founding members of ECIA's Policy Learning Platform as well as coordinator of ECIA. The case of the Dutch policies is not a specific ECIA action.
- 95  
The UK Creative Industries Council is not part of the ECIA Policy Learning Platform, and the Industrial Policy for Creative Industries is not a specific ECIA action. The case has been brought up by Creative England (member of the ECIA Policy Learning Platform).

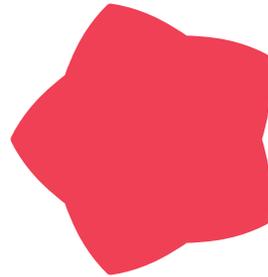




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