



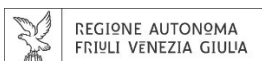
CRE:HUB
***Policies for Cultural Creative Industries: the hub for
innovative regional development***

Roadmap
Lisbon Metropolitan Area (Portugal)

Responsible partner: ADIST – Associação para o desenvolvimento do Instituto Superior Técnico

Status: Final

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1. Introduction

1.1 Short description of the CRE:HUB project

The project “Policies for cultural CREative industries: the HUB for innovative regional development” (CRE:HUB) started on April 2016 and it will continue until the end of September 2020. It’s divided into two phases:

- 1) Phase 1. 01.04.2016 – 30.09.2018;
- 2) Phase 2. 01.10.2018 – 30.09.2020.

During the Phase 1 all eight project partners following their Roadmaps will develop Action Plans for improving cultural and creative industries (CCI) in their regions. During the Phase 2 the implementation of Action Plans will take place.

In the project context CCIs represent highly innovative SMEs and their promotion can effectively increase regional competitiveness and job creation capacity. For participating regions CCIs represent a strategic sector of development as underlined in many of their RIS3 documents. Despite the dynamic and innovative field of action, CCIs encounter difficulties in access to credit and lack resources to enhance their competitiveness on the global market, building effective partnerships, extending their activity to other countries. CRE:HUB overall objective is to improve 8 programmes for Investment for Growth and Employment (TO3), to support creation and development of new SMEs in CC sector at regional and national level through fruitful cooperation among regions with different level of capacities and experiences in CCIs supporting policies.

1.2 Partner information

Partner organisation: ADIST (Association for Development of Instituto Superior Técnico), Av. Avenida Manuel da Maia, 36, R/C Direito, 1000-201 Lisboa

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NUTS2 region: Lisbon

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2. Policy instruments to be addressed

- **Investment for Growth and Employment programme (Policy instrument 1)**
- European Territorial Cooperation programme (Policy instrument 2)
- ⇨ Other regional development policy instrument (Policy instrument 3)

2.1 Background

The Lisbon Metropolitan Area (LMA) covers a territory of 2,944 km², and is inhabited by 2.8 million people as of 2015. The region's population density stands at 932 inh. per km², which makes it the most densely populated region of Portugal. This is unsurprising given the fact the area includes the national capital and is home to 27% of Portugal's population.

The LMA is the most economically advanced region if compared to the rest of Portugal's regions. It leads in terms of income per capita, productivity, and possesses a strong tertiary sector, along with the highest density of enterprises in the country. These favourable economic conditions provide an adequate environment for the CCI sector as well. In addition, the region was classified, as an "innovation follower" region by the Regional Innovation Scoreboard (2014), another example of its high CCI potential.¹

The region was home to 23,125 CCI enterprises (accounting for 46% of all CCI enterprises in Portugal) employing 42,359 people (51% of total employed in the CCI sector in the country) in 2014. The average number of persons employed per company in 2014 was 1,8, making the Lisbon region's enterprises very small on average according to the calculations of project partners.

Statistical data relating to Lisbon region's CCI between 2012 and 2015² shows that employment in the CCI sector has seen an overall decrease, contrary to the total employment in Portugal which saw a small increase in the same period. It also ran contrary to the evolution of CCI on the national level, which saw an 11% rate of growth. Since 2012, employment in the CCI sector in LMA fell from 41.000 people to 35.600 in 2014, registering a slight increase again to 40.600 in 2015 (the CCI sector provided around 3% out of total employment through the period 2012-2015).

¹ European Commission (2014). *Regional Innovation Scoreboard*. Available at <http://bookshop.europa.eu/en/regional-innovation-scoreboard-2014-pbNBBC14001>

² Idem



CCI activities in Portugal are regularly supported by public funding. In 2015, expenditures on CCI activities (that covers: personnel, capital, and other expenditures) in LMA totalled 82.852.000 EUR (21,1% of total CCI expenditure in Portugal as well as 4.7% of total expenditure in the region).³ The share of CCI personnel expenditure and capital expenditure was 7.06% (national expenditure 6.26%) and 1.83% (national – 4.22%), respectively.

The Cultural Satellite Account of Statistics Portugal identified five sectors which it deemed as the largest and most prominent within the scope of CCI in the Lisbon Metropolitan Area (in terms of gross added-value): books and press, audiovisual and multimedia, inter-disciplinary work (such as arts and crafts), advertising, and performing arts. These same five sectors also employed the most people within the CCI industries.

2.2 Targeted policy instrument 1

There are two regional-level policy instruments in the Lisbon Metropolitan Area that support the development of CCI sectors:

- 1) Integrated Territorial Plan (2014);
- 2) Lisbon Regional Action Plan 2014-2020.

The ***Integrated Territorial Plan*** was produced in 2014, within the scope of the Europe 2020 Strategy and the Partnership Agreement Portugal 2020 for the period 2014-2020. The guiding principles of this document make specific reference to the CCI and its importance in developing the region's industries and creating opportunities for future economic prosperity. Its framework outlines two strategic goals: valuing innovation and differentiation in order to accelerate the creation of a knowledge-based economy, and valuing human and social experiences provided by the region in order to deepen tourism and solidify the region's ecological, cultural, and social foundation. In a broader sense, such an all-encompassing strategy is aimed at harnessing the CCI resources for the benefit of regional community, economy, and technology.

³ Statistics Portugal (2016). Culture statistics – 2015. Available at https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=277092494&PUBLICACOEStema=55554&PUBLICACOESmodo=2&xlang=en



The **2014-2020 Lisbon Regional Action Plan's** priority "Smart growth" outlines three primary strategic paths for CCIs through creating sectorial initiatives and promoting support within the sector, as well as protecting and promoting cultural heritage. The Plan's objectives primarily focus on applying the aforementioned initiatives for the benefit of qualified entrepreneurship, internationalization of the sector and increasing exports, investment and funding promotion, and increasing regional tourism attractiveness. Overall, the strategy promotes the CCI sector through concentrating its focus on the entrepreneurial capabilities and product/service competitiveness of regional SME's.

Portugal 2020 is the overarching policy instrument for application of the European Union investment and development funds for the period 2014-2020 in Portugal. ⁴ Its main goal is to overcome structural imbalances by proactively stimulating the capacity of enterprises and the workforce by aligning the regional and national priorities of **the Smart Specialisation Strategy (RIS3)**. Approved in 2014, the Portuguese Strategy for Smart Specialisation ⁵ bases its 2020 vision upon four pillars, one of which specifically includes the promotion of the CCI as a priority theme; scoring a 5 both at national level and at the level of the LMA, the highest priority possible. The Portuguese RIS3 foresees a set of topics for action within the CCI priority theme: valuing products and services (fashion, architecture and design); production, distribution and promotion of CC content (music, film and video, radio and TV, publishing and literary creation, performing and visual arts; preserving and valuing the heritage; advertising; ICT – digital contents and software services; CCI, event promotion and tourism.

CREHUB is an innovative project since it aims at developing regional/national custom-made CCI policies and at supporting RIS3s of many participating regions. CRE:HUB project involves the Managing Authorities (National/Regional) and/or the intermediate bodies in charge of SMEs supporting policies within structural funds programmes.

⁴ European Commission (2014). Decisão de execução da Comissão de 30.7.2014 que aprova determinados elementos do Acordo de Parceria com Portugal, available at

https://www.portugal2020.pt/Portal2020/Media/Default/docs/C_2014_5513_PT_ACTE_f.pdf

⁵ PORTUGAL (2014). Estratégia Nacional para a Especialização Inteligente, available at

https://www.portugal2020.pt/Portal2020/Media/Default/Docs/EstrategiasInteligente/ENEI_Versão%20final.pdf and Annex B at http://www.fct.pt/esp_inteligente/docs/ENEI_Anexo%20B_%20PrioridadesEstrategicas_05junho2014.pdf



2.3 Defined goals

During the implementation of project (evaluation of the research analysis, workshops and discussions with CCI experts, drafting Roadmap), the need to improve the efficiency of the current CCI activities (e.g. support of the National CLUSTER, establishment and development of business accelerator's for CCI in Lisbon), and instruments (e.g. financial distribution/funding currently supervised by state) was emphasized, in order to develop and consolidate an effective policy (in terms of exports and competitiveness of the CCI's sector).

In the result, the Roadmap focus the following goals:

- Improve Industry-government-academia cooperation
- Improvement of the cooperation among different stakeholders and different sectors
- Reducing CCI sector fragmentation
- Improve business environment for technology intensive CCI development (national and regional level);
- Improving financial support for knowledge and technology transfer

The policy instrument implementation shall be improved to promote the development of new creative industries' services and products by SMEs as well as the extension of export capacity of SMEs by integrating good practices and experiences identified at all stages of CC SMEs life cycle in other European countries and regions.

2.4 Planned actions towards implementing CRE:HUB project:

1. Exchange of experience, knowledge and practices with other project partners;
2. Transfer of knowledge and good practices in the CRE:HUB framework;
3. Defining problems and possible solutions to achieve defined goals through the regional analysis, SWOT analysis, Barrier&Solution analysis as well as learning from partners;
4. Preparation of recommendations for policy makers;
5. Based on the project experience (good practices, peer reviews, interregional learning, etc.) and work with stakeholders, elaboration of the Roadmap for the Action Plan;
6. Preparation of the Action Plan;
7. Implementation of the Action Plan.



Achieved policy changes shall be tailored to meet specific CCIs needs, such as creation of partnerships and collaborations among different industries, promotion of internationalization, enhancing entrepreneurial skills

2.5 Performance indicator:

Number of good practices identified at all stages of CC SMEs life cycle integrated into improvements to the regional policies and programmes

- increased number of CCI start-ups
- increased number of project applications
- implemented new CCI projects as well as improved current projects
- increased exporting activities

2.6 Stakeholders

Ministry of Culture, Ministry of Economics, General Secretary of State of Industry, Portuguese Trade and Investment Agency (AICEP), Agency for Competitiveness and Innovation, I.P., Lisbon (IAPMEI), Creative Industries “Incubators” (Mouraria Centre for Innovation, Pólo das Gaivotas, Fablab, etc), National CLUSTER for Creative Industries (ADICCT), Chamber of Commerce and Industry, municipalities and regional authorities (Culture and Innovation Department of Lisbon City Council; Lisbon Regional Coordination and Development Commission (CCDRLVT), initiative as well as professional associations of creative industries (e.g. communication platform Arteemrede), education institutions (e.g. University of Lisbon), self-employed persons, service providers and business support centres (e.g. Lx Factory, coworklisboa.pt; Todos.pt), Lisbon network of business incubators (e.g. Startup Lisbon, Startup Portugal) financial institutions, Portuguese Foundations (e.g. Calouste Gulbenkian Foundation), and other actors (e.g. Trienal de Arquitectura de Lisboa, Moda Lisboa)

3. Activities to implement the project goals

The Roadmap of ADIST is based on the analysis of SWOT (the State of the Art report), and CCI Barriers& Solutions as well as analysis of the Good Practices of the project partners.



4. Activities to implement the project goals

The Roadmap of ADIST is based on the analysis of SWOT (the State of the Art report), and CCI Barriers& Solutions as well as analysis of the Good Practices of the project partners

Activities (measures) under Policy instrument 1- Investment for Growth and Jobs programme

Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
1. Facilitating cooperation among different stakeholders and sectors	<p>1.A1. Elimination of CCI sector fragmentation – identification of possible CCI structures and infrastructures to bring together different CCI projects and initiatives having common goals and covering different CCI subsectors (supporting establishment of a e-Platform for CCI)</p> <p>1.A2. Promotion and development of the National CLUSTER for the creative industry</p>	Within the scope of the CRE:HUB project, institutions of stakeholders, national funds, EU grants	1 November 2018 to 31 October 2020	Monitoring system of involved players and the CRE:HUB project	Secretary of State of Industry - Ministry of the Economy, Ministry of Culture, CCI business incubators, CCI entrepreneurs, CLUSTER for the CCI sector

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Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
	<p>Supporting the establishment of a CCI Incubator for SMEs</p> <p>A3. Facilitating cooperation between R&D Units, Educational Institutions, Associations, and organisations for the transfer of knowledge and technology of the sector</p>	National funds, Private Funds, EU grants			
	<p>1.B. Promotion of cooperation between CCI and traditional sectors, and between CCI and science and technology – supporting the establishment and development of a CCI IT-Centre</p>	Within the scope of the CRE:HUB project, institutions of stakeholders, national funds, EU grants	1 November 2018 to 31 October 2020	Monitoring system of involved players and the CRE:HUB project	Ministry of Culture, Ministry of the Economy, Creative Industries Incubator, CCI entrepreneurs
	<p>1.C. Improvement of the institutional framework. Bringing together different stakeholders from the government, business community, creative entrepreneurs, educational institutions, professional associations & the NGO sector to create an integrated strategy for the</p>	Within the scope of the CRE:HUB project, institutions of stakeholders	1 November 2018 to 31 October 2020	Monitoring system of involved players and the CRE:HUB project	Ministry of Culture, Ministry of the Economy, Ministry of Education, Ministry of Science, Technology and Higher Education, business organisations, educational institutions,

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Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
	CCI – creation of a CCI business council, establishing the ad hoc working groups; permanent networks for different stakeholders; cross-border networks for cities, regions or national governments. (Recommendations based on the experience of CRE:HUB project countries/partners).				business incubators, professional associations, Ministry of Planning and Infrastructures.
	1.D. Improvement of coordination and integration among different regional policy instruments and measures which are related to the promotion of entrepreneurship in rural areas, promotion of innovative SMEs, etc.	Within the scope of the CRE:HUB project, institutions of stakeholders	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of Planning and Infrastructures, Ministry of Culture, Ministry of the Economy

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Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
2.Strengthening the business ecosystem to develop the CCI sector	2.A. Supporting the establishment of a CCI Council and present Recommendations and good practices based on the experience of CRE:HUB project countries/partners. Proposal to focus on the CCI start-ups	Within the scope of the CRE:HUB project, institutions of stakeholders, national and EU funds	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of the Economy, and units that will be supervising the management of the Business accelerator
	2.B. Proposal on establishing the Annual CCI Economic Survey . Facilitating the annual mapping of the business fabric and increasing the CCI ecosystem, in order to evaluate the development of CCI and understand the specific needs. Analysing the demand for creative and cultural products and services	EU grants, Ministry of Culture, within the scope of stakeholders' organisations, Ministry of the Economy	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of Culture, Ministry of the Economy, National Statistical Institute (INE), Chamber of Commerce, Creative Industries Incubators, CLUSTERS
	2.C. Facilitation and strengthening of the collaboration between business sectors, technological	Within the scope of the CRE:HUB project, institutions	1 November 2018	Monitoring system of involved	Ministry of the Economy, CCI incubators, business organisations, creative

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Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
	innovations and CCI . Supporting the establishment of a new IT-Innovation Infrastructure (proposal to have an additional specific focus on the CCI).	of stakeholders, national funds, EU grants	to 31 October 2020	players and CRE:HUB project	enterprises, educational institutions, professional organisations
	2.D. Implementing cooperation on technological intensive activities in the CCI sector Initiatives/ projects with access to skills and resources to increase and share knowledge and technical potential between CCI organisations and/or enterprises.	Within the scope of the CRE:HUB project, institutions of stakeholders, business organisations	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of Economics, CCI incubators, business organisations, enterprises, academic Institutions
3. Competitiveness and internationalization strategy	3.A. Promotion of "design-thinking" . Implementation of 'design thinking' approaches in developing government policy and programs. Promotion of design as a part of the business strategy and an innovation element (awareness raising strategy/campaign in the state institutions as well as educational institutions).	Within the scope of the CRE:HUB project, institutions of stakeholders, national funds, EU grants	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of Culture, Ministry of Science, Technology and Higher Education, Ministry of the Economy, Ministry of Planning and Infrastructures, CCI incubators, business organisations, CCI initiatives,

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Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
	<p>3.B. Improvement of access to financial resources.</p> <p>Revising mechanisms of financial instruments and improving access to such instruments (improving conditions to access micro-loans). Specific focus on CCI entrepreneurship financing in the policy instruments. Improving competencies of institutional organisations (training of experts and mobility on the absorption of EU funds & other financial programmes)</p>	<p>Within the scope of the CRE:HUB project, Ministry of Economics, and institutions of stakeholders, national and EU funds</p>	<p>1 November 2018 to 31 October 2020</p>	<p>Monitoring system of involved players and CRE:HUB project</p>	<p>regional managing authorities</p>
	<p>3.C. Facilitation of national and international networking.</p> <p>Organisation of networking meetings (explaining the nature of networking), strengthening the partnership with CCI stakeholders (including the partnership with the CRE:HUB project), participation in international projects.</p>	<p>Within the scope of CRE:HUB project, EU funds</p>	<p>1 November 2018 to 31 October 2020</p>	<p>Monitoring system of involved players and CRE:HUB project</p>	<p>Ministry of the Economy, Ministry of Culture, Ministry of Education, business incubators, start-ups, Chamber of Commerce, business organisations, CCI initiatives and projects</p>

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Goals	Activities to implement the goals	Resources if applicable	Timing of each activity	Monitoring systems	Players involved
	<p>3.D. Awareness raising about the potential of CCI (including the potential of CCI exports). Raising the global profile – prompting Portugal as one of the leading countries in the creative industries.</p> <p>Support and information dissemination about the current export-oriented initiatives</p>	EU funds, national funds	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of Culture, Ministry of the Economy, Ministry of Education, Chamber of Commerce, business organisations, CCI initiatives and projects
	<p>3.E. Capacity building (strengthening skills and knowledge on commercialisation of “creative ideas”). Supporting the current CCI study programmes and developing new ones oriented to the market needs (business skills, project management, digital skills, exporting, design-thinking approach). Strengthening and developing creative partnership initiatives</p>	Within the scope of the CRE:HUB project and institutions of stakeholders	1 November 2018 to 31 October 2020	Monitoring system of involved players and CRE:HUB project	Ministry of Education, Ministry of Science, Technology and Higher Education, Ministry of Culture, Business organisations, educational institutions, Creative Industries Incubator, CCI initiatives, entrepreneurs

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