Executive Summary

The world is rapidly changing and the beginning of the 21st century brought a lot of new ideas and transitions in simply every single area connected to human activity, including business. Having a brief look at the history timeline, it is clear that a few decades earlier, agriculture and manufacturing played the main role in almost every country in Europe. However, sectors with lower value added prevailed. At the end of the 20th century and in the early years of the 21st century, there was focus on technological development within SMEs, which mostly started to be part of multinational chains, and expansion of services. However, in recent years, with tremendous technological development, interconnection of the world, easier access to resources and a focus on human individuality and quality, there has been a will, endeavour and aspiration to build the economy on innovations, a high-quality workforce, creativity and entrepreneurship.

Furthermore, there is a need for economic-structural change, especially in small regions, in order to be able to react to changes in the global economy and stay competitive. Therefore, it is essential to build up the business environment for fostering innovation and creativity, which is perceived as nonmaterial and strategic material of the next millennium for preserving continual innovation activities and securing the competitiveness of national economies. The cultural and creative industries precisely meet the requirements for this new economic concept. They connect culture with the economy and the market environment of business. They represent a new engine for developed economies, and they are gradually starting to get recognition, though mostly in western countries.

The European Commission has paid great deal of attention to the cultural and creative industries since 2006 and a Green Paper on unleashing the CCIs' potential was released in 2010. According to the EC, the cultural and creative industries are a source of growth and prosperity in the EU countries[1]. A study conducted by TERA Consultants shows that the cultural and creative industries contribute 4.5% to the EU's GDP and have generated eight million jobs in the EU, accounting for 3.8% of the employment rate[2].

The EC highlights the importance of the cultural and creative industries as an innovation mechanism due to their interconnection with other sectors and, in particular, their "spill-over effect". The positive externality enables the transfer of knowledge, innovations and technology from one sector to another. Moreover, they contribute to the development of ICT skills, creation of non-automated jobs, youth employment and the high employment rate of women, while also playing a role in intergenerational and intercultural dialogue. Furthermore, the creative industries are driven by small and medium-sized companies and individuals that eventually become agile and innovative employers. It is important to embrace the possibilities and untapped potential of the CCIs by establishing a new support mechanism and by implementing investments to foster economic growth.

With respect to describing the cultural and creative industries, there is not an official definition of CCIs. The most common and well-known definition of the cultural and creative industries was first introduced in the United Kingdom in the Creative Industries Mapping Document in 1998[3]. According to that definition, creative industries are those which are based on individual human creativity, human

[1] (European Commision, 2010)
[2] (TERA Consultants, 2012)
[3] (Department for Digital, Culture, Media & Sport, 1998)

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skills and talents. Moreover, the creative industries have the potential to create wealth and skilled jobs, especially through intellectual property rights.

Even though there are more definitions of CCIs and various definitions might be found across continents, countries and even in institutions within a country, there are usually similar patterns in each definition. These encompass the importance and presence of creative people, the influence of new ideas, development and continuous innovation, creation of new services and products, acceleration of the innovation impetus of the developers of new technologies.

Talent and human creativity are the foundation of the creative and cultural industries' activities. The essence of CCIs lies in the creation of art and intellectual property. Scenic art, crafts, and the antiques market is the core and source of inspiration for other branches. The cultural industries are characterised by wider production, mass distribution and thus the export business. The cultural industry involves branches such as books and publishing, radio and television, film and video, music and computer games. The creative industries use the cultural value as an input and the source of innovation in the production of noncultural goods. The purpose of the culture is mostly functional. The creative industries include architecture, advertising, design, fashion and software development (Green Paper, EC, 2010).

The Creatinno project was established through cooperation of three institutions: CzechInvest, Beaz Bizkaia and Creative England. All three home countries these institutions – the Czech Republic, Spain and the United Kingdom – rank among the advanced economies. Nevertheless, there is a common awareness of the need of continuous improvement. These countries are seeking greater economic competitiveness. The strategy is to discover the business potential of entrepreneurs and investors and the goal is to use trends in progressive sectors of the global economy.

In all of the partner countries, there are already activities being undertaken by the agencies seeking support of SMEs operating in the CCI field. However, the support system in not yet adequately developed and it does not grasp all of the potential that the CCIs possess. Therefore, it is important to develop and enhance the current services aimed at supporting the CCIs to more effectively exploit the possibilities and strengths of SMEs involved in the CCIs. **The objective of the project is to develop the current CCI support policies in partner countries and thus increase the competitiveness and business skills of cultural and creative SMEs on the national and European scale with focus on the Spanish, British and Czech markets.**

In the Introduction chapter, there is a description of why the agencies joined the project, the objectives of the project, how challenges are being addressed and the project timeline. Moreover, in the subchapter titled Situational Framework, there is a description of the current state and the needs of each partner country. The methodology used in the project is described at the end of the chapter.

In the second chapter, Mapping Analysis, there is an analysis of the mapping methods in each partner country. The analysis is based on a set of questions that were answered by all partner countries. At the end of the chapter, there is a recommendation for each country.

In the third chapter, there is a set of different types of support programmes aimed at CCIs. These programmes are based on the analysis of the partner countries' existing support programmes. At the end of the chapter, there is a recommendation for each country.

The best practices from each partner country follow.

At the end of the DOP, there are institutional maps showing the relationships and interconnection of the relevant institutions and programmes.

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List of Abbreviations

ASAF – Association of Czech Animation

CCIs – Cultural and Creative Industries

CSU – Czech Statistical Office

DMCS – Department for Culture, Media and Sport

DOP – Design Option Paper

EC – European Commission

IDU – Arts and Theatre Institute

JIC – South Moravian Innovation Centre

NIPOS – National Information and Consulting Centre for Culture

SMEs – Small and medium-sized enterprises

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Table of Contents

Content

Executive Summary 1
List of Abbreviations 3
Table of Contents 4
Introduction 5
Target Groups 15
Mapping Analysis 18
Analysis of Support Programmes 46
Conclusion and Recommendations 83
Institutional Maps 91
Best Practises 94
Bibliography 104

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Introduction

1. THE CHALLENGE

Three innovation support agencies implemented the Creatinno project, namely CzechInvest of the Czech Republic, Creative England of the United Kingdom and BEAZ Bizkaia of Spain. All of these agencies have a strong background in terms of activities aimed at supporting SMEs' innovation.

CzechInvest contributes to the development of innovative start-ups and SMEs through its range of various programmes and activities and supports business infrastructure and innovation. It has extensive experience with management of complex international projects. Furthermore, it ran the national EU funding mechanism for national business support and is responsible for the operation of several nationwide start-up support programmes. With respect to the cultural and creative industries, a few goals connected to the broader term "creative economy" have been incorporated into the strategy. Firstly, the aim is to support SMEs in incorporating the trends connected to the creative economy and design. Secondly, it is necessary to attract "smart" investments, which encompass sophisticated projects, technological development and a high-quality workforce. The agency is thus aware of the importance of creativity within the economy and is striving to embrace the potential of the cultural and creative industries.

In the late 1990s, the United Kingdom become a pioneer of the creative industries concept in Europe, when a working group at the Department for Culture, Media and Sport (DMCS) founded by Prime Minister Tony Blair in 1997 initially defined the creative industries. Currently, the not-for-profit organisation Creative England seeks to promote the growth of the creative industries. Through a broad range of diverse mechanisms and tools including direct investment, soft loans, events, mentoring and provision of platforms, it supports talented people and businesses and their creative ideas. Nevertheless, despite the interventions designed to support the CCIs, the UK is facing some issues in terms of availability of growth financing to creative SMEs beyond the start-up stage, a skills shortage, a lack of diversity in creative sector jobs and future uncertainties regarding Brexit.

BEAZ Bizkaia is a public agency of the Provincial Council of Bizkaia in charge of innovation management. It strives to support entrepreneurs in new, higher-value-added projects, internationalisation, innovation and job creation. Furthermore, it is a member of the Executive Committee of the Bilbao Bizkaia Design Council (BiDC), which aims to foster creativity and design for the purpose of the province's economic development. The agency is seeking to consolidate its service portfolio and to address a larger number of companies. Moreover, it realises there is great potential and inadequacies in areas such as cooperation of older companies with start-ups, promotion of intersectorality, financial access and, mainly, cooperation between agents of the cultural and creative industries value chain. In other words, participation of the public and private sectors involving technology organisations, financial institutions, etc.

All of the agencies operate some programmes supporting CCI SMEs. However, some of the support programmes are not adequate or tailored for the cultural and creative industries. They do not grasp all of the potential innovative approaches and are not sufficiently flexible to respond to the exponential growth of technologies and thus the cultural and creative industries. Therefore, through permanent learning, transfer of good practice, cooperation and knowledge exchange, enhancement of existing innovation support programmes for SMEs and establishment of new ones have been achieved within this project.

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2. OBJECTIVES

The project is a response to the insufficient support programmes for CCI SMEs. The results of the project encompass the transfer of good practices in support for SMEs' innovation, enhanced communication among institutions supporting the CCIs and identification of needs to which the partner agencies will later respond.

The target groups of the project are creative SMEs, innovation agencies and regional stakeholders and policymakers.

The objective of the Creatinno project is to increase the competitiveness and business skills of creative SMEs on European markets through support services for creative SMEs.

The specific objectives of the project are the following:

IMPROVING SUPPORT FOR SPANISH (BASQUE), BRITISH AND CZECH CCI SMALL AND MEDIUM-SIZED ENTERPRISES

Improving the quality of support for CCI SMEs by increasing knowledge in the innovation infrastructure and sharing experience.

IMPROVING SKILLS IN MAPPING CCI SMALL AND MEDIUM-SIZED ENTERPRISES AND IDENTIFYING THEIR NEEDS

The Peer Learning activities will enable the introduction of different kinds of methods for mapping CCI SMEs in the partner countries and compare individual results. Sharing best practices and comprehensive analysis will improve skills in the areas of mapping and identifying their needs.

IMPROVING SKILLS IN EXPLOITING THE TALENT OF REGIONAL CCI SMALL AND MEDIUM-SIZED ENTERPRISES TALENT

The innovation agencies will improve the possible promotion activities involving regional attractiveness based on potential local CCIs and enhance the understanding of CCI SMEs' needs in the regions based on cooperation between the agencies.

IMPROVING EXISTING SUPPORT PROGRAMMES USING THE INSTITUTIONAL NETWORK

An institutional map will be defined within the project. Links between the individual support programs will be identified and the existing support programmes in the Czech Republic and other affiliated partner countries will be improved based on shared best practices. Bridge the gap between CCI SMEs and public and other institutions. Improve the knowledge and awareness of the CCIs.

CREATING NEW CONNECTIONS AND EXTENDING THE EXISTING NETWORK OF INNOVATION AGENCIES

Connect selected ecosystems and exploit synergies at the European level. Establish a sustainable partnership among the project partners.

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3. APPROACH TO ADDRESSING CHALLENGES

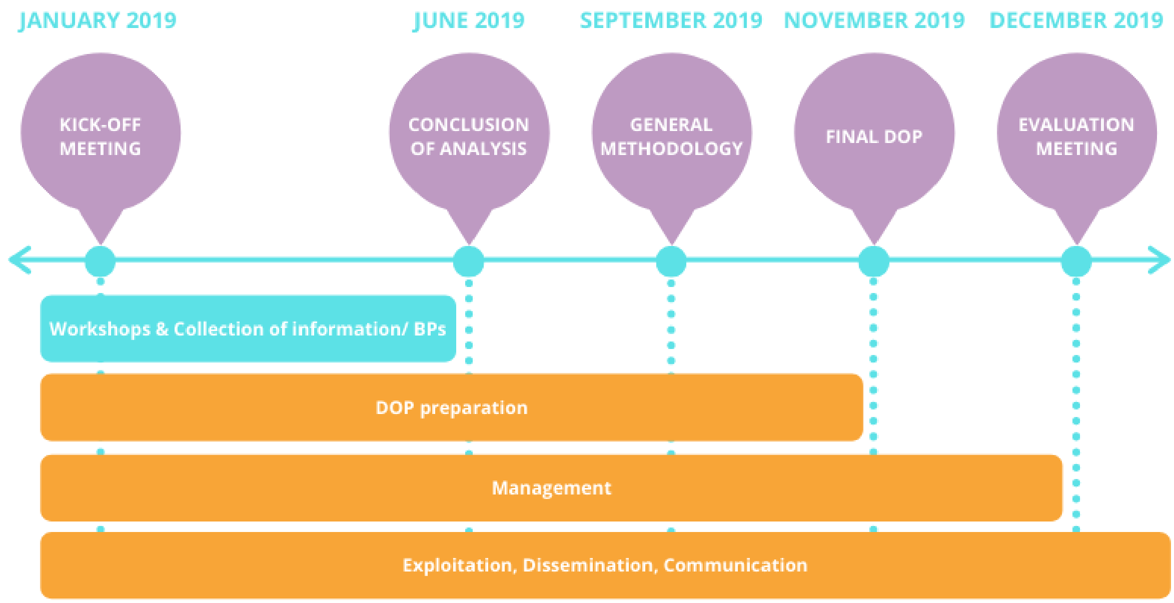
The expected purpose of the project was to improve knowledge about the cultural and creative industries and to boost promotion of CCI SMEs in the regions. Besides awareness of the CCIs in the regions, another challenge to be addressed was support for CCI SMEs and identification of new possibilities for support mechanisms via cross-cultural cooperation and improvement of the current mechanism in order to respond to current needs. On top of that, the fundamental aspect of the project was to build mutually beneficial relationships among the partners in Europe.

The outputs were based on the Twinning+ methodology among the three partners of the Creatinno consortium (CzechInvest, Creative England and BEAZ Bizkaia). This methodology is based on sharing problems, good practices, experience, know-how and knowledge between two or more entities. In this way, the methodology provided an opportunity to design and implement better practices in terms of support for CCI SMEs. The result of the implemented peer-review and learning process is the **Design Options Paper (DOP).**

4. PROJECT TIMELINE

The DOP serves as a "cookbook" for other innovation agencies and institutions in Europe. It will provide guidelines for designing and implementing support programmes and services for CCI SMEs in order to exploit their full potential.

The DOP is the result of 12-month project. Over the course of that period, three workshops took place in each partner country, where the relevant activities and discussions were undertaken. The project timeline is provided in the chart below.



5. SITUATIONAL FRAMEWORK

The challenge was jointly identified by the three partner organisations during their communications prior to the development of the EISS project.

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CULTURAL AND CREATIVE INDUSTRIES IN THE CZECH REPUBLIC

The cultural and creative industries are still not well known among the public. There are several problems connected with awareness of the CCIs, with interconnections within the industries and between people, with the political and strategic approach to supporting the CCIs, etc. Mapping activities have been carried out, mostly by the Arts and Theatre Institute, where the needs of the CCIs were analysed. The problems range from political, economic, social issue to the technological environment and the right conditions for further development. Since the CCIs consist mostly of small companies and self-employed people, it is essential to foster the right environment for them, organise cultural happenings, foster education for creative and talented people and promote their further growth. Moreover, since there is greater emphasis on technological development and digitisation, it is also important to ensure access to public spaces equipped with technology and allow the CCIs to use the possibilities of Industry 4.0.

Some of the specific needs are the following (inspired by the project *Mapping of the Cultural and Creative Industries in the Czech Republic*[4])

- Promotion of CCIs
- Fostering talent and creativity development in education
- Communication platform – access to relevant information
- Cooperation of education institutions
- Networking of talented people and access to internships
- Support of intermediates (umbrella organisation, professional organisation, agencies, managers, agents) -> able to ensure promotion, financing, marketing, export
- Workshops and mentoring focused mostly on business skills and marketing
- Interconnection of the stakeholders
- Assurance of technical infrastructure and facilities
- Regional databases of creative people
- New types of education such as creative centres, hubs, incubators, clusters including technological equipment for testing, production and consumption
- The need to simplify access to information, financing and infrastructure for small enterprises, start-ups and self-employed people
- Interconnection of art, technology and the economy (experimental laboratory, new studies – education focused on video-game development, special visual effects, design management)
- Support for research, technological development and innovation – diffusion with other sectors (engineering, medical sector)
- Strategy to support video games, design, crafts and the music industry
- Bank guarantee
- Involvement of creative people in resolving regional issues, etc.

Based on the roundtables held at the beginning of the Creatinno project, five steps related to the approach to the CCIs in general were formulated by the stakeholders.

[4] (IDU, 2014)

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1. RAISING AWARENESS OF CCIs

For many people, the term "cultural and creative industries" is still unknown and too abstract. Companies do not consider themselves to be part of the industries, public representatives are not familiar with the meaning of CCIs and there is a lack of necessary data.

2. STATE SUPPORT

The CCIs are not considered to be a priority, though are part of the agendas of several ministries. It is necessary to initiate a discussion about the CCIs and to define the institutions responsible for the CCIs.

3. MAPPING OF CCIs

It is necessary to set a unitary and comprehensive methodology for the mapping of the CCIs and to carry out that mapping. The acquired data should serve as a basis for the further development of the CCIs.

4. CREATION OF A COMMUNICATION PLATFORM FOR THE CCIs

Creation of the platform will enable better cooperation and share of information among state administration, professionals of CCIs and the companies. Finding of the needs in the CCIs is crucial for the supporting system development, which is the final step.

5. SUPPORTING SYSTEM DEVELOPMENT

The key activity is development of the support system for the CCIs. It should be focused on support for creative education and incubation of companies, as well as financial support for companies and self-employed people.

The Creatinno project is at the beginning of changes in the process of approaching the CCI. Even though mapping activities are already being carried out in the Czech Republic and the CCIs are being incorporated into some regional strategies, the Czech Republic is still facing the first step related to raising awareness of the CCIs.

CULTURAL AND CREATIVE INDUSTRIES IN THE UNITED KINGDOM

In the UK, the creative industries are the fastest growing sector of the economy, contributing over £100 million in GVA and employing over two million people. As a result, they have been receiving more attention in the areas of policy and investment than was previously the case. The government's definition of "creative industries" officially comprises nine sub-sectors, but these are part of a much broader creative economy. Based on current trends, the creative industries could deliver close to £130 billion in GVA by 2025 and creation of approximately one million new jobs by 2030. The creative industries are also enablers of other industries. The government has clearly prioritised investment in creative innovation, particularly by raising investment in research and development. In 2017, the government and industry agreed on a Creative Industries Sector Deal as part of the government's new industrial strategy. The deal comprises a series of commitments from the government and industry designed to overcome barriers to growth. Some of these key barriers and challenges are outlined below.

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- Low productivity in some creative sectors – Productivity is difficult to measure in some creative industries and, as in many industrial sectors in the UK, the overall productivity of the sectors is fairly low.
- Most creative businesses are very small (95% have fewer than ten employees), meaning they lack the resources and corporate functions of larger businesses as in other sectors. The creative sector is composed of large numbers of self-employed individuals moving from project to project – this means it is quite difficult to measure and lacks a strong collective voice to address the government.
- Possible exit from the EU – The UK's creative sector relies on talent from Europe. The proposed immigration salary threshold is too high for creative businesses and the UK also may lose access to EU schemes such as MEDIA and Creative Europe.
- There is large-scale regional inequality in terms of opportunities and investment available for creative businesses in the UK. There is a significant concentration of creative sector jobs in London and the South East, as well as in big cities such as Bristol, Manchester and Edinburgh, while more rural places have very small creative sectors, if any.
- Skills shortages – Creative education and adult skills training in creative subjects are lacking in the UK. Companies struggle to find and recruit suitable talent.
- Inadequate infrastructure – Expensive workspace and, in some regions, lack of fast broadband connection can limit business expansion.

CULTURAL AND CREATIVE INDUSTRIES IN THE BASQUE COUNTRY

1. RAISING AWARENESS OF CCIs

In Biscay, industrial design has been taken into consideration and promoted for the past 35 years due to its relevance, significance and value added value, as well as its contribution to the improvement of new products, processes and services.

Moreover, bearing in mind that the economy is growing with focus on digitalisation and enhancement and promotion of the creation of jobs in which new skills and abilities are required as well as the value added by people, creativity and creative thinking are taking on greater relevance in the Basque Country.

Public and private institutions are taking this into consideration and striving to promote the sector through aids, programmes, services, events and activities.

2. STATE SUPPORT

From the perspective of the territory and region, the value and contribution of the CCIs is very important, as these industries are highlighted as one of the opportunity fields by the Smart Specialisation Strategy of the Basque Country RIS3. Moreover, their importance is undeniable in a transversal way due to the generation of value and innovation in different sectors.

Regarding our model of governance and the promotion of CCIs, a regional and local multilevel model has been established.

3. MAPPING OF CCIs

There is a unified definition of what CCIs are in our country and it is accepted by all institutions. Mapping activities are thus based on this definition and initially carried out thanks to the European

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Creadis3 project and conducted by the Basque Government with the collaboration of different public and private regional and local agents.

4. CREATION OF COMMUNICATION PLATFORM FOR CCIs

Once the first mapping activities were carried out through the European Creadis3 project, a detailed and deep analysis of the sector and its situation was done.

One of the main outputs of the thinking process and the study was linked to the creation of a Creative District conducted by the Basque Government. The Basque Government has already elaborated a draft version of the content of this Creative District (ed. note – December 2019). Presentation of the initiative and the strategy will be the next step of the process in order to begin its implementation. The idea is that this approach will be based on the so-called "one-stop shop model".

5. SUPPORTING SYSTEM DEVELOPMENT

There are specific programmes and activities focused on the CCIs. Moreover, it must be stated that different events of the creative sector are often used for the promotion of the territory and to heighten visibility in relation to the outside world.

Looking ahead at the next steps, a redesign of programmes, aids and activities should be carried out, taking into account the real necessities of each sub-sector.

The aim is to create and design a tool that measures the indirect value added of the cultural and creative industries in other sectors.

6. METHODOLOGY

Despite the different creative ecosystems in each partner country, a clear and comprehensive methodology has been set up for formulation of the DOP.

The project is aimed at support programmes that focus on SMEs. In the field of cultural and creative industries, there are a lot of non-profit organisations. Even though there are various definitions of SMEs, the project is aimed at the for-profit sector. Moreover, it is important to note that some of the programmes aimed at SMEs do not include support for freelancers or self-employed persons.

The project responds to the current support services for creative SMEs and its goal is to improve the agencies' innovation support activities. However, the DOP and, more specifically, the support programme analysis, also include support programmes of other institutions, as those programmes are considered to be important and it is essential to take them into consideration for the completeness and accuracy of the analysis.

Not all of the existing support programmes in each country are analysed. Most of the programmes are provided by the partner institutions, whereas the rest of the programmes were chosen based on their relevance and magnitude or the supported sub-sector. Coverage of the supported sub-sectors includes mostly the design, video games, audio-visual and fashion sub-sectors. A lot of programmes are multisectoral. However, a lot of multisectoral programmes are not specifically designed for CCIs.

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METHODOLOGY OF THE TASK: MAPPING ANALYSIS

Within the task related to the mapping, the mapping methods in the participating countries were compared. A set of twenty-six questions was created so that situations and mapping methods could be compared.

The questions are the following:

1. Who guarantees the cultural and creative industries in your country? Is the responsibility shared by different institutions?
2. What is the definition of cultural and creative industries in your country/region?
3. Is there a unified definition of cultural and creative industries in your country that has been accepted by all institutions?
4. Does mapping of cultural and creative industries respect this definition?
5. What industries are included in the definition?
6. Please add the list of NACE codes of the sectors included.
7. Who is responsible for mapping the cultural and creative industries in your country/region? Which institutions cooperate on these activities?
8. What is the source of financing of mapping activities?
9. How big is the budget allocated to mapping activities?
10. How often is mapping carried out?
11. How are the competencies within the cultural and creative industries divided in your country?
12. How do you collect data? Please briefly describe the process.
13. Please list the main mapping activities in your country over the past five years.
14. Why do you think it is important to perform mapping of the cultural and creative industries?
15. For what purpose are the collected data used?
16. Which institution first mapped the cultural and creative industries in your country?
17. Please give a brief history of mapping in your country/region.
18. Which institutions use the collected data?
19. Are the data being used at the political level?
20. Are the data available to the public?
21. Which economic indicators are mapped? (e.g. employment, GVA)
22. Which strategies are linked to the results of mapping?
23. What do you think are the pros and cons of mapping the cultural and creative industries?
24. Would you change the process of mapping in your country in any way? If so, please describe how.
25. Do you have any feedback from actors in the cultural and creative industries on the mapping and its outcomes?
26. How and to whom are the results of mapping presented?

Despite the fact that the term *Cultural and Creative Industries* (CCIs) differs in partner countries (e.g. sometimes CCIs are referred to as only *Creative Industries* or as *Cultural and Creative Sectors*), in the whole project we use only the term *Cultural and Creative Industries*. Only in connection with Great Britain, definition *Creative Industries* is used.

Since the term *Cultural and Creative Sector* is described in the project (as part of the definition), the sectors included in this term such, as design, architecture, TV and radio, etc., will be described as sub-sectors.

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METHODOLOGY OF THE TASK: ANALYSIS OF SUPPORT PROGRAMMES

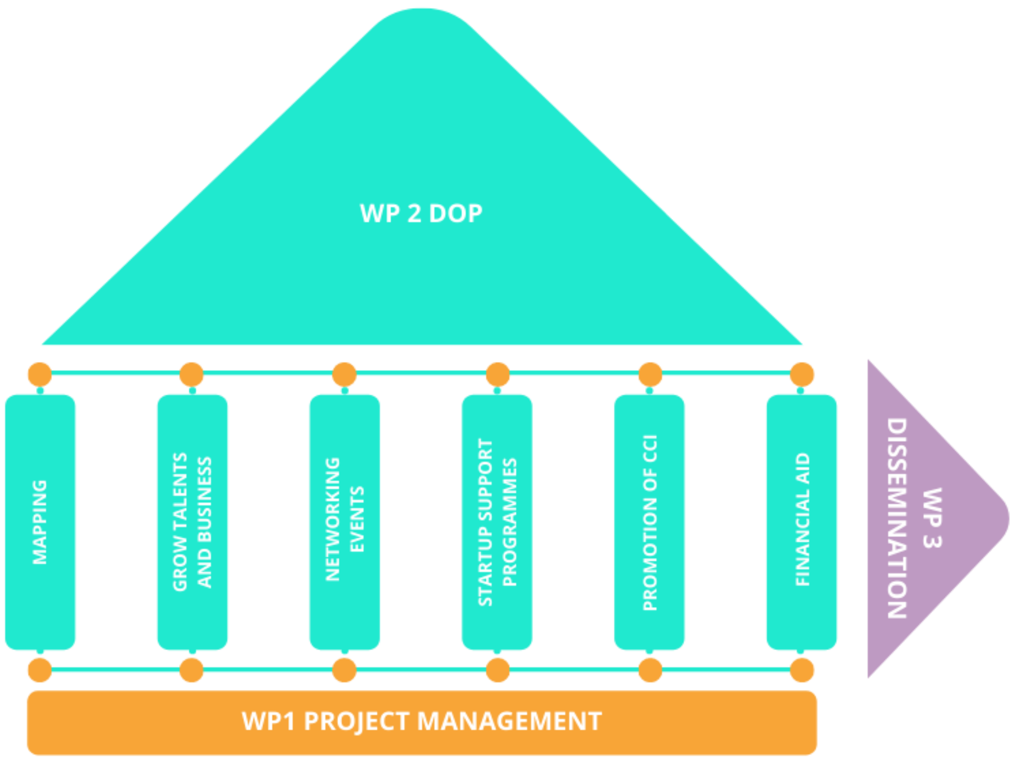
There are five pillars that represent the most typical and frequent forms of supporting programmes in each country. These are: Grow Talent and Business, Networking Events, Promotion of CCIs, Start-up Support Programmes and Financial Aid.

Each partner country identified several national/regional programmes within each pillar. The programmes within each pillar were analysed based on their main characteristics. Afterwards, the programmes were aggregated according to frequent and relevant similarities. Finally, the most general types of programmes representing the support policies were generated within each pillar.

All programme types are described below. The summary of the programmes includes a general description, advantages and disadvantages of the programmes, best practice tips and an example of a programme from one of the partner countries as a case study. The advantages and disadvantages are based on discussions with the stakeholders who provide the support programmes. These advantages and disadvantages were aggregated and put together according to the type of programme in which they fit.

Note that each programme type might vary according to different criteria, e.g.:

- Budget
- Size/reach of programme
- National/international
- Duration of the programme
- Topics covered
- Sector/type of business
- Institution (private, public)



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METHODOLOGY OF THE TASK: BEST PRACTICE

From each partner country, one company chosen as a representative for the best practice. In the Czech Republic, the company **RenderWaves s.r.o.** operates in the screen sub-sector. In the United Kingdom, the company **Lockwood Publishing** operates in the field of videogaming. In the Basque Country, the company **VirtualWare 2007 S.A.** operates in the field of design.

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Target Groups

Target group of Creatinno	Policymakers, regional stakeholders
Why do CCIs interest me? / How can I help?	• Make strategic decisions to support CCIs (cultural policy, national support programmes) • I can help build new infrastructure or provide existing infrastructure for the establishment and development of CCIs (e.g. incubators) • I can influence the system of (creative) education at preschools and elementary and secondary schools, which will later significantly influence the development of the CCIs. • I can influence the aesthetics, functionality and use of public space in the form of, among other things, public competitions.
Inspiration in the DOP	• *Cultural and creative industries in the Czech Republic (8–10)* • *Who guarantees the cultural and creative industries and how are the competencies divided?* (22–23) • *Recommendation for the Czech Republic* (43–44) • *Useful References* (44–45) Possible programmes: • *Workshops* (48–50) • *Co-working Spaces* (56–57) • *Promotion of CCIs* (63–68) • *Financial Aid* (76–82)

Target group of Creatinno	Innovation agencies and other supporting institutions
Why do CCIs interest me? / How can I help?	• I can initiate, set up, administrate and promote support for companies through CCI vouchers. • I can take part in the transfer of good practice. • I can aggregate supporting data for argumentation for development of CCIs. • I can raise awareness in the area of CCIs. • I can initiate meetings of individuals and companies in the same sector and connect sectors to each other, integrate component goals and attempt to lobby for better conditions of support for CCIs. • I can map the relevant CCI infrastructure. I can develop incubator facilities and other supporting infrastructure for CCIs.

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Inspiration in the DOP	• Setting of the definition, mapping, dissemination of results (12–43) • *Who guarantees the cultural and creative industries and how are the competencies divided*? (22–23) • *Recommendation for the Czech Republic* (Mapping Analysis) (43–44) • *Conclusion and Recommendations* (83–86) Possible programmes • *Grow Talent and Business* pillar (46–57) • *Networking Events* pillar (58 – 62) • *Promotion of CCIs* pillar (63–68) • *Start-up Support Programmes* pillar (69–75) • *Financial Aid* (76–82)

Target group of Creatinno	**Creative SMEs**
Why do CCIs interest me? / How can I help?	• I can initiate unification of my branch and internal discussion. • I can aggregate supporting data for argumentation for development of CCIs. • I can collaborate with specialised institutions on the formulation of programmes (e.g. promotion of CCIs).
Inspiration in the DOP	• *Networking Events* pillar (58–62) • *Promotion of CCIs* pillar (63–68)

Target group of Creatinno	**Fictive single institution for CCIs**
Why do CCIs interest me? / How can I help?	• Aggregation of data on the business sector and CCI support infrastructure for argumentation regarding the significant potential of CCIs in the Czech Republic. • Effect on positive decision-making in places of influence through argumentation based on hard data and experience from abroad. • Regular communication platforms with CCI actors for sharing information, inducements and good practice in the Czech Republic and abroad. • Overview of CCI support projects in the Czech Republic and creation of connections between individual entities and transfer of synergies to CCIs in the Czech Republic; at the same time, prevention of duplication and parallel activities thanks to regular sharing of information.

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- Systematic determination of CCIs' needs and their coverage through national and international cooperation projects – distribution of results to the involved actors in the Czech Republic.
- Single online hub (creation of a new hub or designation of an existing hub) for sharing information.

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Mapping Analysis

INTRODUCTION

CCIs are a source of economic growth with strong potential for local and regional development. There are several reasons why the mapping of CCIs and evaluation of the current state of the cultural and creative industries is important:

- To understand the dynamics of the cultural and creative industries, to learn more about the sector and to understand the specific needs.
- During the mapping activities such as seminars and group meetings, new relationships and projects arises.
- To engage decision-makers in cultural and creative industries policy. Mapping provides a platform on which to build policy arguments and push the cultural and creative industries agenda forward. It demonstrates to politicians the commercial and cultural benefits of the sector and the need for a policy to support it.
- To identify trends and plans for future growth. The creative sector is rapidly evolving. Mapping allows interested parties to identify problems and helps to design effective policy interventions to overcome them. For example, mapping helped identify that in the UK, there is a very strong start-up ecosystem in the creative industries, but the scale-up ecosystem is less strong. From this, support programmes focusing on access to financing and targeted mentoring have been directed at start-up businesses looking to scale-up.
- To raise visibility among cultural and creative businesses themselves. It often happens that cultural and creative businesses working in similar sectors are focused on sustaining their own business and are not always aware of other cultural and creative businesses around them. This means that they are losing out on opportunities for collaboration. Mapping helps them connect, see what they have in common and provide greater opportunities for collaboration.
- To understand the characteristics of the creative clusters located around the country. Such understanding gives an idea of which clusters are concentrated where and the different sectors that make up the clusters in a certain region. It also allows us to see how sectors working within clusters collaborate and interconnect.

For example, before the first mapping was carried out in the UK, the creative industries tended to be seen as marginal to economic life and dependent on public subsidies. Advocates of the creative industries concept believed that this was too narrow a view – the totality of economic activity stemming from creativity and culture, including their commercial forms, needed to be considered to understand their true contribution. The mapping was crucial to support the argument that the industries with their roots in culture and creativity were an important and growing source of jobs and wealth creation. The yearly statistical estimates have given strength to this argument, showing the fast growth of the creative sector and how it is an important part of the future economy.

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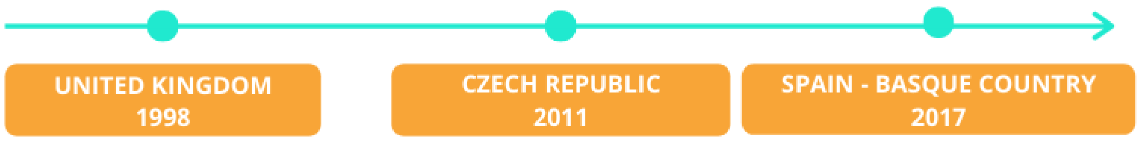
HISTORY OF THE MAPPING:

The first mapping



Czech Republic

In the Czech Republic, the first steps towards getting familiar with the term “CCIs” dates back to 2007, when the first project related to CCIs started to come out. That was the beginning of the initial comprehension of the term and of the first mapping of CCIs. It was also when the first publication about CCIs was published. However, most of the action was realised thanks to a contributory organisation of Ministry of Culture, the Arts and Theatre Institute (referred to by its Czech initials, IDU). Apart from the city of Prague, other institutions in the rest of the country were mostly not aware of the term “CCIs”. When the first mapping in the regions took place later, that was the beginning of growing awareness of the CCIs also in the regions. Nowadays, there are already some networking activities taking place and people from the CCIs are starting to get to know each other. However, further steps need to be taken in order to get recognition mostly from the public and from the municipalities.[5]

United Kingdom

The mapping document of 1990 was the first systematic attempt to define and measure the creative industries. It was designed both to collect data on the industries and to promote deeper understanding of the sector by telling its story in a way that politicians, journalists, investors, academics and government officials could immediately understand. Thinking of the creative industries as a united sector, in the same way that the aerospace, pharmaceutical and automotive industries were, drew attention to the large contribution that they were making to the UK’s economy and made it possible to draft a policy specifically targeted at helping them to grow.

The decision to produce the first Creative Industries Mapping Document in 1998 marked the start of political attention and policy directed toward the creative industries. Mapping happened at regular intervals afterwards and drew attention to a sector which, with its mix of technology, diverse employment and long and complex cultural heritage, is unlike any other sector of the economy. The idea of the creative industries soon started to catch on, as it was seen as a key to the future of Britain’s

[5] (IDU, 2014), (Kraus, Petkov, & Růžička), (Žáková & kolektiv, Mapping Cultural and Creative Industries in the Czech Republic, 2015)

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changing economic landscape. The definition adopted by the DCMS and the list of creative industries derived from it soon became influential internationally, with countries such as Hong Kong, Singapore, China, Australia, New Zealand and Scandinavia carrying out their own mapping in a similar way.

Basque Country

The cultural and creative industries comprise an emerging sector that has recently started to stand out in the Basque Country and is gradually evolving and gaining position among other industries. As shown by the results achieved by different agencies, the CCIs are recognised by the Basque Country as a source of economic growth with strong potential for local and regional development.

Moreover, the conceptual development and the first programmes intended for all of the cultural and creative industries are very recent and appeared particularly during the past decade. Only in recent years, thanks to the European CREADIS3 European, the Basque Country has been able to conduct different mappings through its provinces to analyse and define the current state of the cultural and creative industries, while getting to know the regional creative ecosystem and the stakeholders and administrations involved in their reinforcement.

In the following image, you can see a map of the mapping history of the partner countries, particularly the Czech Republic:

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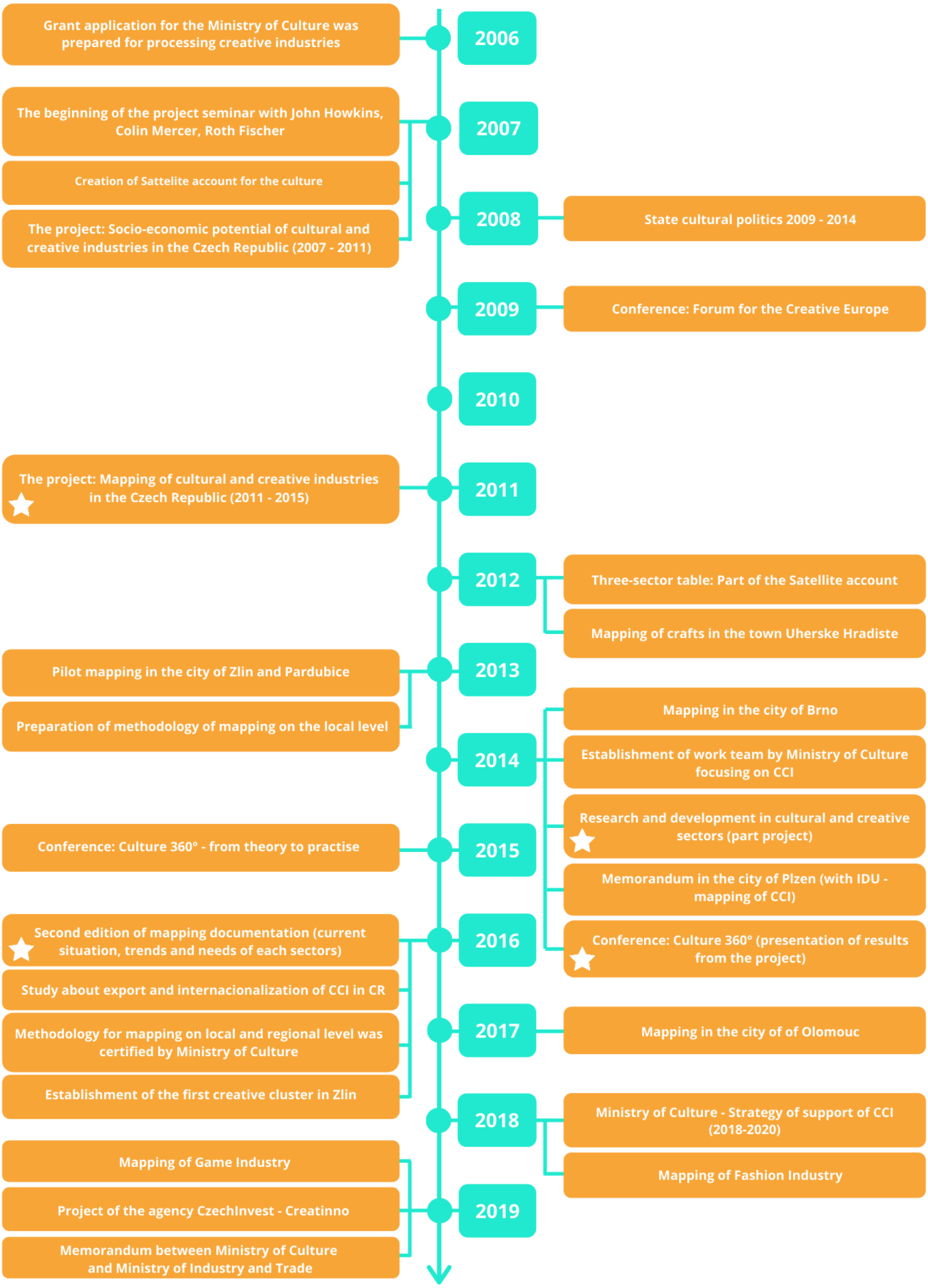

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WHO GUARANTEES THE CULTURAL AND CREATIVE INDUSTRIES AND HOW ARE THE COMPETENCIES DIVIDED?

With respect to guaranteeing the cultural and creative industries, it is important to point out the importance of the multilevel approach that combines different public and private actors in order to appropriately distribute competencies.

Czech Republic

In the Czech Republic, the Ministry of Culture is responsible for the cultural strategy, while the main activities connected with the cultural industries are in the hands of its contributory organisation, IDU. However, the creative industries are still undervalued, and the competencies related to the creative industries are not clearly divided.

The United Kingdom provides an inspirational way to divide competencies.

In the UK, responsibility for the cultural and creative Industries is split between the Department for Culture, Media and Sport (DCMS) and the Department for Business, Energy and Industrial Strategy (BEIS). All sectors included in the creative industries are supported by the Department for Culture, Media and Sport, but some more commercially oriented sectors such as software and IT are also supported by the Department for Business, Energy and Industrial Strategy.

United Kingdom

There are many organisations working to support the creative industries in the UK. Some of the main ones are listed below:

The Department for Digital, Culture, Media and Sport (DCMS) is the governmental department responsible for general oversight and policy relating to the creative industries.

The Creative Industries Council is a joint forum of the government and industry. Made up of key government and industry stakeholders, it was established in 2011 to serve as a voice to represent and drive appropriate policy for the creative industries. The council has a number of working groups with different responsibilities and each sector of the creative industries has a representative who has a seat on the council. The working groups meet regularly to discuss areas such as access to financing, skills, export markets, regulation, intellectual property, infrastructure, diversity and clusters and how a best practice policy can be created and support the growth of the sector.

Creative England is a not-for-profit organisation working with both public- and private-sector partners to support digital creative sectors, with a focus outside of London. The organisation invests in, supports and connects creative digital SMEs so that they can sustain and grow their business. It also runs mentoring and development programmes to provide opportunities for new talent across the country and ensure the creative sector has a diversity of voices producing moving-image content.

The Creative Industries Federation is a membership body which represents practitioners and businesses working in the creative sector. It brings together a network of creative organisations, holds events and advocates for appropriate policy developments for the creative industries.

ScreenSkills is an organisation working to develop skills and talent and invest in the future of the UK's screen industries. It provides research, mentoring, skill-specific training, career advice and an event directory for those looking to work in the UK's screen sectors including animation, film, games, television including children's TV and high-end drama, VFX and immersive technology sectors.

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In addition to these cross-sectoral bodies, each sub-sector within the creative industries has a trade body which is responsible for supporting businesses and individuals working within that sector and representing and advocating for the specific interests and needs of that sector at the political level. Examples are The Craft Council, The Design Council, The Publishers Association and The Association for UK Interactive Entertainment. A senior representative from each trade body will usually have a seat on the Creative Industries Council.

At the regional level, local enterprise partnerships (LEPs) also provide business support, advice and mentoring services for creative businesses throughout the UK through **Growth Hubs**. As there is no set structure for how these should be provided, the quality of services offered for creative businesses varies greatly between different regions.

Basque Country

The CCIs are recognised by the Basque Country as a source of economic growth with strong potential for local and regional development.

With respect to guaranteeing the cultural and creative industries, it is important to mention the importance of the multilevel approach, which combines different public and private actors.

With the multilevel approach, a smart specialisation strategy is maintained. In this way, the different competencies are distributed in the following manner:

- Region: its main competencies are the budget, local and regional development, economic development and cultural strategy and development of programmes promoting R+I, innovation and internationalisation. The region has the capacity to leverage taxes to reinforce the sustainability of projects.

- Provinces: have competencies include implementation of the regional policy through funding programmes and capacity for tax regulation.

- Cities: have competencies in the cultural and economic areas to promote events and support local infrastructures (theatres, museums, incubators, etc.)

In this way, responsibility is shared by different institutions at the regional (Basque Government), provincial (Bizkaia County Council, Gipuzkoa County Council, Araba County Council) and city (Bilbao City Council, Donostia City Council, Vitoria City Council) levels.

Summary

In Great Britain, there is a strong infrastructure in terms of the management of CCIs, including the division of competencies among the public bodies as well as establishment of umbrella institutions and their interconnection and cooperation. Regarding the Czech Republic, although there are some associations representing and advocating and lobbying for the sub-sectors, there is still a problem with the proper comprehension of the CCIs and with the division of competencies division and cooperation among institutions. In particular, the creative industries do not receive sufficient attention from the public. In the Basque Country, the term “CCIs” is at the beginning of the journey. However, since the project of mapping is organised by the public bodies, there is a strong possibility that the CCIs will be quickly recognised by the government and municipalities.

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DEFINITION OF CULTURAL AND CREATIVE INDUSTRIES IN THE PARTNER COUNTRIES

Czech Republic

There is still not an official and uniform definition of CCIs that would be accepted by all institutions. The widely used and published definition in the *State Cultural Policy* is inspired by the European Commission. The definition is as follows following: *"The cultural and creative sectors (CCSs) include activities that are based on human creativity, skill and talent. CCSs are based on cultural values and artistic and creative expression. They have the potential to create wealth and jobs, in particular by using intellectual property. They include activities (services, works, performances and products) that are of a public, non-profit and market nature, regardless of the type and method of financing used by the entity that carries them out. The outputs of the CCSs' activities contribute with their value added to other economic sectors and can be a source of technological and non-technological innovation (creative and digital economy). CCSs have many other positive impacts on society and the specific individual. CCSs include architecture, design, advertising, film and audio-visual content, music, books and publishing, digital games, software, new media and related IT services, radio and television broadcasting, performing arts, visual arts, crafts, gastronomy, and cultural heritage."* / Definition provided by the Czech Ministry of Culture, 2014[6]

The disagreement related to the fragmented definition lies in the wording of the term, especially whether it should be called cultural/creative sectors or industries. The utilitarian term "creative industries" has been accepted to legitimise the power of culture, to enable connection with strong partners that are considered economically strong, to highlight the cultural overlaps with the industrial sector and to show that the CCIs contribute to the economy. However, EC, IDU and the Ministry of Culture recommend that the term "cultural and creative industries" should be used only in relation to market-oriented businesses and that the term "cultural and creative sectors" should be used instead. Despite that, the term "industries" is already rooted and still widely used.

Regarding the classification of the sub-sectors within the CCIs, there is no uniform approach. In some cases, software, digital media, tourism, gastronomy, crafts, ICT are included, but not in other cases.

United Kingdom

The creative industries were first defined in the Creative Industries Mapping Document, which was the outcome of a mapping exercise carried out by the Department for Culture, Media and Sport (DCMS) in 1998, and then reviewed in 2001. This was the first comprehensive analysis of the creative industries in the UK.

In that document, the creative industries were defined as "*those industries which have their origin in individual creativity, skill and talent and which have potential for wealth and job creation through the generation and exploitation of intellectual property*". This definition has been retained by the government in all creative industries-related policies over the intervening 20 years.

The general definition set out above is still used by the government in all creative industry policies and is part of the statistical estimates related to contribution to the economy. The definition itself is quite broad, so it is generally accepted and used by all institutions working to support the creative industries.

[6] (Ministry of Culture, 2014)

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After establishing the definition, the DCMS worked closely with stakeholders to determine which occupations and sub-sectors should be included in the creative industries. Thirteen sub-sectors were originally listed, but changes have since been made.

The changes were mainly due to research completed by the National Endowment for Science, Technology and the Arts (Nesta). Nesta argued that the list-based approach to mapping was very ad-hoc, and that it was unclear which underlying threads linked a seemingly very different set of sub-sectors together. It proposed a more analytical and systematic classification system to establish which sub-sectors should be included. In 2013, after broader consultation and further mapping exercises conducted by the DCMS, the list of included sub-sectors was reduced to nine and has remained as such since then. These sub-sectors are detailed in the answer to question 5.

Despite the changes to the mapping technique, the overarching definition of what defines a creative industry has remained the same.

Basque Country

Historically, when trying to elaborate a uniform definition of the creative and cultural industries, there have been several controversies and there are still discrepancies in the established definitions. Nevertheless, in the Basque Country an agreement has been reached on the definition of these industries:

Cultural industries are those that produce and distribute goods or services considered to have a specific attribute, usage or specific objective that includes or commands cultural relations and expressions at the time when they are created, regardless of their commercial value.

Creative industries are those that use culture as an input and possess a cultural dimension in spite of the fact that the outputs are mainly functional. Among them are design and architecture, which integrate creative elements in broader processes, and other sub-sectors such as graphic design, fashion design and publicity.

The definition is uniform and accepted by all institutions. Moreover, the same definition is used by the European Union.

SUMMARY

In the United Kingdom, the definition of CCIs was formulated a long time ago and some changes have been made to it since then. However, the definition of CCIs has a strong background in the UK and it is accepted by all institutions. In the Czech Republic, the definition was formulated by the EC. However, the wording changes depending on the institutions using the term and the classification of the sub-sectors differs in various documents as well. In the Basque Country, there is a uniform definition taken from the EC and all of the institutions accept it.

DOES MAPPING OF THE CULTURAL AND CREATIVE INDUSTRIES RESPECT THIS DEFINITION?

Czech Republic

In the Czech Republic, mapping has been carried out at different levels and by different institutions. The definition is mostly accepted, but the wording and the classification of sub-sectors differ.

Annual mapping of CCIs is carried out within “the satellite account of culture”, known officially as the Statistics on Culture. The Statistics on Culture identify the cash flow within the culture, the efficiency

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level of the economy in the sectors, the range of investment sources, the wage rate, etc. The triple-sector definition of CCIs is used for this. The categories are cultural sector, cultural industries and creative industries, as identified by the NACE code classification.

Table 1: Sub-sectors mapped by NIPOS/CSU

SECTOR	Sub-sector
Cultural sector	Heritage
	Scenic art
	Fine art
	Education
	Crafts
Cultural industries	Film and video
	Music
	Radio
	TV
	Books and printing
	Videogames
Creative industries	Architecture
	Advertising
	Design

Source 1: CSU, NIPOS [7]

Apart from software, ICT and new media, the annual mapping within the Statistics on Culture respects the definition given. Moreover, this mapping adheres to the ESSnet Culture project, which enables comparison of the cultural statistics with those of other countries. However, in the recommended and certified methodology for mapping CCIs (provided by IDU), there are additional modules that represent supporting sectors such as software, IT, new media, printing and reproduction of recorded media and other cultural activities related mostly to amusement and recreation activities.

Another proposal for a new definition set forth by IDU and published in the mapping also included new media, gastronomy and, explicitly, fashion.

Other mapping activities have been carried out also at the regional level. Usually, mapping uses the certified methodology provided by IDU. However, it is sometimes modified according to the needs of the region. The utilised definition sometimes includes sectors or industries. In some cases, the creative sector includes more sub-sectors, e.g. research market.

Moreover, a new project called Strategy for Development and Support of CCIs is being implemented by the Ministry of Culture. The same definition is used in this project, though the CCI sub-sectors are divided into four groups:

- Creative media
- Creative crafts
- Scenic art
- Source of creativity

[7] https://www.czso.cz/documents/10180/90577095/0900051906.pdf/2ef0a61a-7e06-4449-9734-b9e8c0b7a35e?version=1.2

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United Kingdom

As the definition is fairly broad, it is easy for mappings of the creative industries to respect this. However, as mentioned above, there have been some changes to the mapping methodology.

Nesta is an independent innovation research foundation based on government endowment in 1998. In 2006, it became a major source of original research and influential policy advice in the field of innovation. In 2013, Nesta published *A Dynamic Mapping of the Creative Industries*, which argued that the criteria on which occupations were classified as "creative" by the DCMS were unclear. The ad-hoc and seemingly random, list-based method meant that the sectors included as part of the creative industries were inconsistent and important sectors with high creative intensity, accounting for a large amount of creative employment, had been excluded. The paper also argued that the list had not been updated with digitisation and it thus excluded many creative occupations with a large software-based element.

In response to this, the government held a consultation to review which sectors made up the creative industries. The outcome was to act upon Nesta's recommendation and adopt a new mapping methodology based upon creative intensity.

It has also been recognised that there are many creative occupations in sectors that are not included in the creative industries. To account for this, estimates for the creative economy are also mapped. These estimates measure the broader contribution of all creative jobs to the overall economy, not just the jobs that fall within the creative industries.

The three key terms now widely used when mapping the creative sector are listed below:

- **Creative Occupations –** a role within the creative process that uses cognitive skills to create new or significantly enhanced products whose final form is not specified in advance. Creative occupations also exist outside of the creative industries (embedded creative occupations).
- **Creative Industries –** these are any industries that are composed of a certain proportion of creative occupations. Statistical estimates of the value of the creative industries are also inclusive of the non-creative occupations in sectors of the creative industries (e.g. organisational or administrative support).
- **Creative Economy –** this includes the economic contribution of all occupations in sectors included in the creative industries and all of the embedded creative occupations in sectors outside of the creative industries.

The relationship between the creative industries, creative occupations and the total value of the creative economy is shown in the Venn diagram below. The area of the whole diagram is representative of the creative economy.

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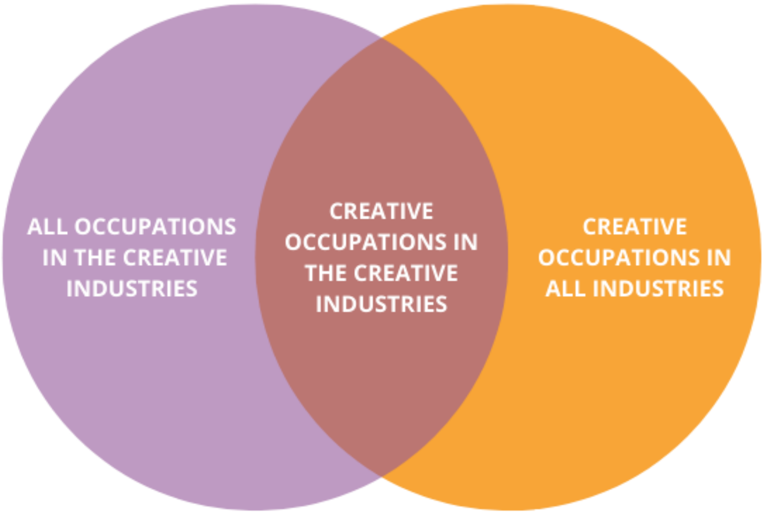

Basque Country

In the Basque Country, mapping activities are quite new. Therefore, there is a common tendency to adhere to the established definition in order to have the ability to compare and contrast the results of mapping.

SUB-SECTORS INCLUDED IN THE DEFINITION

Czech Republic

The following classification is provided by IDU. However, new projects involving mapping of CCIs and development of strategies have been conducted with a modified definition and classification of CCIs.

Cultural sectors:

- Scenic arts
- Fine arts
- Cultural and artistic education
- Monuments, museums and galleries
- Libraries and archives
- Crafts

Cultural industries:

- TV and radio
- Film and video
- Books and printing
- Music
- Video game development

Creative industries:

- Architecture
- Design
- Advertising

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- Software
- Fashion
- Gastronomy

United Kingdom

The first mapping exercises carried out by the DCMS in 1998 and 2001 resulted in 13 sub-sectors being included in the creative industries. However, as discussed in question 2, there have been changes to the mapping methodology, meaning the number of sub-sectors has been reduced to nine. The sectors originally listed by the DCMS and the changes proposed by Nesta in “A Dynamic Mapping of the Creative Industries” in 2013 are shown in the table below.

Comparison between DCMS broadened sectors and proposed broadened sectors		
DCMS sectors	**Proposed sectors**	**Changes**
Advertising	Advertising and marketing	Broadened to include marketing
Architecture	Architecture	No change
Arts and antiques	None	Not included in proposed classification
Crafts	None	Not included in proposed classification
Design	Design and designer fashion	Conflated to form a single sector
Designer fashion		
Film and video	Film, TV, video, radio and photography	Conflated to form a single sector
Television and radio		
Interactive leisure software	IT, software and computer services	Conflated to form a single sector
Software and computer services		
Music	Music, performing and visual arts	Conflated to form a single sector and defined differently in terms of SIC codes
Performing arts		
Publishing	Publishing	No change

After a public consultation with stakeholders in the broader creative industries, the DCMS acted on most of the changes suggested by Nesta, with the exception that crafts remained a creative industry and museums, galleries and libraries were also included. The nine sub-sectors that now make up the creative industries are listed below:

- Advertising and marketing
- Architecture
- Crafts
- Design and designer fashion
- Film, TV, video, radio and photography
- IT, software and computer services
- Publishing
- Museums, galleries and libraries

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- Music, performing and visual arts

Basque Country

Cultural sectors:

- Performing arts
- Visual arts
- Crafts
- Audio-visual content
- Printing and publishing industries
- Language industries
- Music and heritage

Creative sectors:

- Architecture
- Digital content
- Design
- Gastronomy
- Fashion
- Advertising and marketing
- Video games

COMPARISON OF CCI CLASSIFICATIONS

The infographic below shows the definition of CCIs in the partner countries. The definition in the Czech Republic is the widely used classification of CCIs. However, changes to the classification are being made in various projects (mapping, strategies, etc.) depending on the institution carrying out the given project. Therefore, the infographic is not applicable to the whole Czech Republic. However, the CCIs are usually divided into three sectors such as the cultural sector (traditional culture), cultural industries (creative sectors according to IDU) and creative industries (creative sectors according to IDU). This division is also used in the Statistics on Culture compiled by NIPOS/CSU. However, in the mapping conducted by NIPOS/CSU, gastronomy and software are not included. In the Basque Country, the definition includes the cultural and creative sectors. In the United Kingdom, there is a unified term: creative industries.

The sub-sectors included in the creative industries by all partner countries are the following: advertising, architecture and design (taking into consideration the Czech definition provided by IDU, there is also fashion, software and IT included). Both the Basque Country and the United Kingdom also include marketing and video games in the creative industries. The sub-sectors classified as cultural industries/sectors in the Czech Republic and in the Basque Country are the following: film and video, books and printing, TV, radio and music. Moreover, gastronomy is also part of the CCIs in the Basque Country and sometimes in the Czech Republic (taking into consideration the Czech definition provided by IDU).

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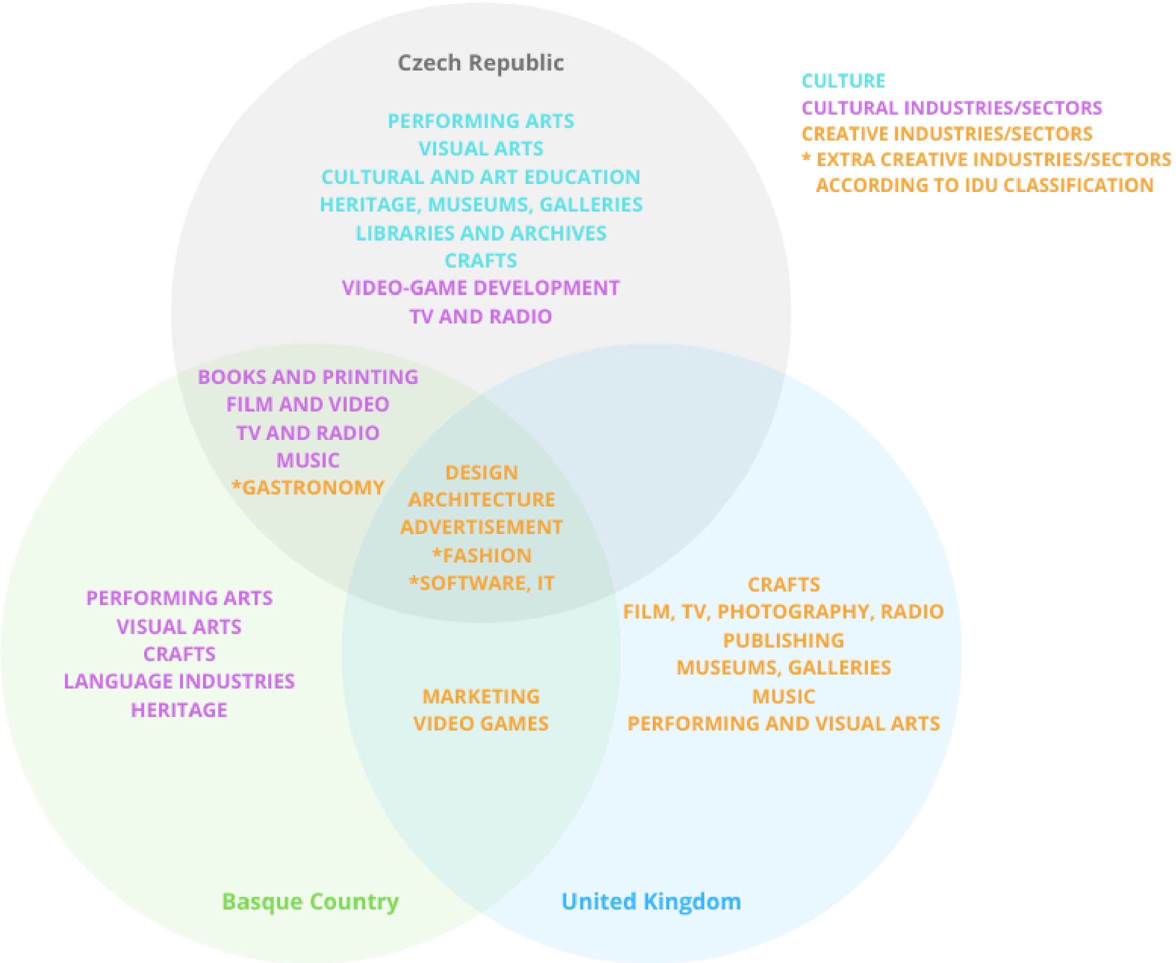

Source: BEAZ Bizkaia, Creative England, Czech definition: CSU, IDU, NIPOS

LIST OF SUB-SECTOR NACE CODES

The table below lists the NACE codes used by all of the partner countries. For the Czech Republic, the listing is a result of the project *Mapping of the Cultural and Creative Industries in the Czech Republic*. The majority of the codes are used by the Czech Republic. However, there are discrepancies related to the usage of the codes.

For example, crafts do not have specific NACE codes and NACE codes from the other sectors are used instead. Therefore, their use may be disputable, as they do not have to fulfil the criteria of creativity (e.g. NACE code 1412*: Manufacture of the work clothes*). On the other hand, the NACE codes 5915–5919 used in the Basque Country are not included in either the Czech Republic or the United Kingdom, even though they relate to the film industry and are characterised by a high rate of creativity (*Film distribution and film promotion activities*). NACE code 6203: *Computer facilities management activities*

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and NACE code 8411: *General public administration activities* may be disputable for the Czech Republic, since management activities do not always have to fulfil the criteria of creativity, but rather represent the support system.

Library and archive activities are part of the listing in all partner countries. However, the United Kingdom and the Czech Republic have these activities classified in NACE code 9101: *Library and archive activities,* whereas the Basque Country has them classified in NACE code 9105*: Activities of libraries* and NACE code 9106*: Activities of archives*.

Code	Name of the Economic Activity	Basque Country	Great Britain	The Czech Republic
932	Amusement and recreation activities			✓
1811	Printing of newspapers			
1812	Other printing			✓
1813	Pre-press and pre-media services			✓
1814	Binding and related services			✓
1820	Reproduction of recorded media			✓
3212	Manufacture of jewellery and related articles		✓	✓
4761	Retail sale of books in specialised stores	✓		✓
4762	Retail sale of newspapers and stationery in specialised stores	✓		✓
4763	Retail sale of music and video recordings in specialised stores	✓		✓
4778	Other retail sale of new goods in specialised stores	✓		✓
4779	retail sale of second-hand goods in stores	✓		✓
5811	Book publishing	✓	✓	✓
5812	Publishing of directories and mailing lists		✓	✓
5813	Publishing of newspapers	✓	✓	✓
5814	Publishing of journals and periodicals	✓	✓	✓
5819	other publishing activities	✓	✓	✓
5821	Publishing of computer games	✓	✓	✓
5829	Other software publishing		✓	✓
5911	Motion picture, video and television programme production activities	✓	✓	✓
5912	Motion picture, video and television programme post-production activities		✓	✓
5914	Motion picture projection activities	✓	✓	✓
5913	Motion, picture, video and television programme distribution	✓	✓	✓
5915	Production and film-related activities	✓		
5916	Motion picture, video and television programme production activities	✓		
5917	Film distribution and film promotion activities	✓		
5918	Motion picture, video and television programme distribution activities	✓		
5920	Sound recording and music publishing activities	✓	✓	✓
6010	Radio broadcasting	✓		✓
6020	Television programming and broadcasting activities	✓	✓	✓

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6201	Computer programming activities		✓	✓
6202	Computer consultancy activities		✓	✓
6203	Computer facilities management activities			✓
6209	Other information technology and computer service activities			✓
6311	Data processing, hosting and related activities			✓
6312	Web portals			✓
6391	News agency activities	✓		✓
6399	Other information service activities			✓
7021	Public relations and communication activities		✓	
7111	Architectural activities	✓	✓	✓
7311	Advertising agencies	✓	✓	✓
7312	Media representation		✓	✓
7410	Specialised design activities	✓	✓	✓
7420	Photographic activities	✓	✓	✓
7430	Translation and interpretation activities	✓	✓	✓
7722	Renting of video tapes and disks	✓		✓
8411	General public administration activities			✓
8412	Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security			✓
8552	Cultural education	✓		✓
8559	Other education	✓		
9001	Performing arts	✓	✓	✓
9002	Support activities to performing arts	✓	✓	✓
9003	Artistic creation	✓	✓	✓
9004	Operation of arts facilities	✓	✓	✓
9101	Library and archives activities		✓	✓
9102	Museum activities	✓	✓	✓
9103	Operation of historical sites and buildings and similar visitor attractions	✓		✓
9104	Botanical and zoological gardens and nature reserves activities			✓
9105	Activities of libraries	✓		
9106	Activities of archives	✓		
9321	Activities of amusement parks and theme parks			✓
9329	Other amusement and recreation activities			✓
94992	Activities of organizations supporting cultural initiatives			✓
14, 15, 16, 17, 23, 31, 32	Crafts - included in the specific NACE codes		✓	✓

Note: The NACE codes in the section on the Czech Republic that are colour coded are included in the annual Statistics on Culture. The rest of the codes are included in other modules suggested by IDU.

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WHO IS RESPONSIBLE FOR THE MAPPING OF CULTURAL AND CREATIVE INDUSTRIES IN YOUR COUNTRY/REGION? WHICH INSTITUTIONS COOPERATE ON THESE ACTIVITIES?

CZECH REPUBLIC

In the Czech Republic, annual mapping of CCIs is carried out (since 2009) in connection with cultural the Statistics on Culture provided by the Czech Statistical Office and NIPOS, a contributory institution of the Ministry of Culture. This mapping measures the CCIs' contribution to the economy. However, it does not include all of the sub-sectors and there are disputes related to the relevance of the data. In terms of local mapping, a certified methodology is provided by IDU. Thanks to the long-term project related to the mapping of CCIs in the Czech Republic, more institutions, especially universities, have carried out local mapping in compliance with the given methodology. However, some institutions conduct their own mapping activities.

United Kingdom

At the national level, the government is responsible for mapping the creative industries. The DCMS produces annual statistical estimates that measure employment in the creative industries and their economic contribution to the UK economy.

In addition, the DCMS has also conducted regional mappings since 2016. These compare the growth of the creative industries in regions across the country. The first regional mapping was published in 2018 with data from 2010-16 and the second was published in February 2019 using a dataset from 2010-17.

Within regional governing bodies, there is no official obligation to map the creative industries, though they are sometimes mapped by local enterprise partnerships (LEPs), which constitute a devolved system of regional government consisting of joint partnerships between local government and private sector businesses. LEPs determine local economic priorities and lead policy on economic growth and job creation within their local area. England has a total of 38; each area of the country has a LEP responsible for its economic development.

LEPs with the creative industries as a priority sector sometimes carry out mappings of the creative industries in their area of responsibility. As there is no specific mandate to do this, it happens on a more random basis.

Outside of the national and local government, the main source of mapping is Nesta. Since the "A Dynamic Mapping of the Creative Industries", Nesta has produced two comprehensive mapping documents, both giving detailed regional-level data.

Mapping has always been funded by the government.

Basque Country

In the Basque Country, the first mapping of CCIs has been carried out thanks to the INTERREG Europe cooperation programme, through CREADIS3 "Smart Specialisation Creative Districts" collaborative project.

In order to fulfil the objectives, good practices have been adhered to, such us territorial diagnostics and mappings of each of the six CREADIS3 partners. The Regional Government of the Basque Country has been responsible for making it possible with the collaboration of other institutions such as the Bizkaia, Gipuzkoa and Araba County Councils and the Bilbao, Donostia and Vitoria City Councils. At the

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provincial level, the Council of Bizkaia has financed mappings of four creative sectors, which are already supported by the Bizkaia Creative Aid Programme. These mappings were carried out individually by each of the specific associations of those four sectors (design, video games, audio-visual and fashion).

HOW OFTEN IS MAPPING CARRIED OUT?

Czech Republic

Mapping is carried out mainly randomly. It is usually connected with a certain project or need of each sector. The only annually conducted mapping is carried out by the Czech Statistical Office and NIPOS in connection with the Statistics on Culture (since 2009). Mapping at the regional and local levels is usually only a one-time activity.

United Kingdom

National-level mapping is carried out once every year and the statistical estimates that result from it are published online. Outside of the annual DCMS statistical estimates, mapping takes place on a more ad hoc basis, though major mapping research is usually conducted roughly every three years.

Basque Country

Mapping has been carried out at both the regional and county levels just once due to the early stage in which the sector of cultural and creative industries started to emerge. Moreover, the mapping was not done until 2016-2017, when the cultural and creative industries and their conceptual framework were initially defined in the Basque Country.

Looking forward, at the Basque Country level, the main target is to conduct mapping biannually. Moreover, the second phase of European Creadis3 project calls for a second mapping of CCIs. Therefore, with the mapping methodology and good practices set out, the idea is to henceforth organise mapping activities of the sector every second year.

HOW ARE DATA COLLECTED?

For local mapping, the Czech Republic recommends that it should serve only for **local mapping** since the whole process is very time consuming in terms of data collection, verification and interpretation. This process is according to the certified methodology provided by IDU[8].

1. Creation of a list of entities

- As part of the first phase, a database of entities that includes companies, public institutions, non-profit organisations and sole traders active in the monitored sectors is created. However, public registers are not a 100% reliable source of information. Therefore, the information in the database for each entity needs to be verified.

2. Verification of the list

- In the second stage, the database is verified, thus creating the most accurate list of active entities in the cultural and creative industries (sectoral employment data and surveyed annual turnover figures). To make the information as accurate as possible, the competent people for each industry are contacted, gaining valuable "eye-to-eye" information.

[8] (Bednář, Dubová, Kraus, Návrat, & Žáková, 2016)

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3. Quantitative analysis

- The verified list of entities is analysed according to criteria such as the number of entities, their legal form, number of employees and annual turnover. It is then possible to add another indicator.

4. Identification of needs during sectoral seminars

- In the third phase of the survey, further information on the CCI sectors, their actors and their needs is examined. Selected representatives of the monitored sectors are invited to the seminars.

5. Questionnaire survey

- An important source of information is a questionnaire survey. Respondents are asked questions about the needs of the sectors and the possibilities of developing creativity and culture in the region. Such questionnaires help to verify some of the conclusions that have been reached and to obtain a comprehensive picture of the situation in which people and organisations in the cultural and creative industries are active and operate.

6. Additional methods

- Structured interviews with those industry representatives who are unable to attend the seminars due to time or capacity reasons serve as a supplement to the previous research activities – seminars and a web questionnaire.

For **annual mapping at the national level**, there is a recommendation provided by the United Kingdom**.**

The method of data collection and mapping was changed in 2013. Nesta proposed that the sub-sectors included as part of the cultural and creative industries should be decided by a more robust, analytical classification method called the “*Dynamic Mapping Method”.* After consultation with industry, this was adopted and used to determine which sectors made up the cultural and creative industries. This is detailed below.

First, all occupations identified in an industry consultation were scored against a “grid” of five criteria in order to determine the creative intensity of certain professions. These criteria are listed below.

1. **Novel process** – Does the role most commonly solve a problem or achieve a goal, even one that has been established by others, in novel ways?
2. **Mechanisation resistant** – Does the role require a specialised workforce using creative talent for which there is no mechanical substitute?
3. **Non-repetitiveness or non-uniform function** – Does the transformation which the occupation effects likely vary each time it is created because of the interplay of factors, skills, creative impulse and learning?
4. **Creative contribution to the value chain** – Is the outcome of the occupation creative irrespective of the context in which it is produced? For example, musician working on a cruise ship in the transport industry is still creative, but a printer working in a bank is likely operating a machine and is not creative.
5. **Interpretation, not mere transformation** – Does the role do more than merely “shift” the service or artefacts in place or time (e.g. create new and novel things)?

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After analysis using the five criteria above, the proportion of creative occupations in each industry was then calculated. This is called the creative intensity. Sectors with creative intensity above a specified threshold were included.

Once relevant sectors were established by the use of creative intensities, the SIC codes (the Standard Industrial Classification – SIC –is a system for classifying industries by means of four-digit codes; the system was developed in conjunction with the equivalent NACE codes) of these sectors were grouped into the nine broad sub-sectors of the creative industries. This method is described as dynamic, as creative intensity data are comparable over time, which means that it can respond to structural economic changes.

To gather the data for the annual statistical estimates, the DCMS uses data sources from the Office of National Statistics (ONS). It collects data for each creative sector and uses that data to produce aggregate statistical estimates for the cultural and creative industries.

- Occupation data is obtained from the Annual Population Survey (APS), which is itself a derivative of the Labour Force Survey (LFS).
- Gross value-added data is obtained from the Annual Business Survey (ABS), a survey of businesses listed in the Interdepartmental Business Register (IDBR). These businesses are classified by industry under the Standard Industrial Classifications (SIC207), which was introduced in the 2008 data.
- Statistics on exports of services are derived from the International Trade in Services (ITIS) survey, which examines businesses' overseas trade, and are also based on the definitions set out by SIC2007, which was introduced in the 2009 data.
- Exports of goods are taken from ONS statistics on trade in goods by classification of product by activity (CPA).

Nesta's national mapping is based on the same method, but it mapping research often contains more detailed data. It uses additional data from the business structure database, the annual business survey and the Companies House API, Glass AI, Gateway to Research and Meetup.

FOR WHAT PURPOSE ARE THE COLLECTED DATA USED?

Mapping should serve as an instrument for the interpretation of CCIs needs.

United Kingdom

In the UK, policymakers use the data to help them design their interventions both nationally and regionally. At the national level, those working within the creative sector use the data to understand the nature of the sector and to build policy arguments and make the case to policymakers for interventions to support it. For example, statistical data gathered on the UK's creative industries have shown that certain groups in society are underrepresented and that the sector does not reflect the diversity of the UK's population. As a result, targeted support schemes designed to engage a more diverse demography have been developed by organisations working within the sector and funded by the government.

At the local level, LEPs use regional-level data to design and carry out their interventions and creative-industry support packages. Trade bodies and other organisations working in a support capacity use the mapping data to evaluate the state of their specific sector and identify areas that need additional support.

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As a result of mapping and measuring the economic contribution of the creative industries, stakeholders in the industries were able to demonstrate the growth potential of the creative sector and strongly argue the case for the Creative Industries Sector Deal in 2017 as part of the government's new industrial strategy. The creative industries were one of five sectors of the UK economy to receive a sector deal, which has been responsible for targeted policy interventions and greater investment for the sector.

The Creative Industries Sector Deal is the most recent national strategy resulting from mapping of the creative industries. In 2017, the government committed to the Creative Industries Sector Deal. The Bazelgette review, an independent review commissioned by the government to provide information on this deal, relied heavily on data gathered from mapping exercises carried out since 1998 to make its recommendations for the sector.

The Sector Deal is a series of joint policy commitments between the national government and industry. Through this deal, the government is in the process of investing more than £150 million in the creative industries.

The key government and industry policy commitments in the sector deal are:

- A £20 million Cultural Development Fund, split between five emerging creative clusters.
- An £80 million research clusters programme aimed at establishing partnerships between universities and the creative industries in nine regions, as well as an independent Research and Evidence Centre.
- A £2 million industry-led Creative Careers Programme, aimed at reaching 2,000 schools and 600,000 pupils in two years.
- A commercial investment programme from the British Business Bank to improve access to finance for high-growth firms outside of London. This programme runs alongside a £4 million government commitment to an intensive programme of investment readiness support in three areas of the UK.

WHICH INDICATORS ARE MAPPED?

Czech Republic

Within the IDU mapping, the following indicators are mapped:

- Verified list of entities
- Employment in the sector
- Yearly qualified and refined annual turnover of entities in each sector

Within the Statistics on Culture, the following indicators are mapped[9]:

- Revenues
- Costs
- Production value
- Intermediate consumption
- Gross value added
- Number of employees

[9] (NIPOS, CSU)

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- Investment expenditure
- Export
- Import
- Number of entities

Other indicators that are specifically mapped within the sub-sectors:

- ASAF (Association of Czech Animation): Number of visitors, budget per project, number of films produced, applications for public support by project type, evolution of the number of graduates

United Kingdom

The mapped economic indicators and their results are published by the DCMS annually. The indicators include the following:

- The gross value added (GVA) of the creative industries. This is the value of all of the goods/services produced by all sectors included in the creative industries after the cost of inputs and materials relating to the production have been accounted for.

- Employment – This indicator measures the number of individuals employed in the creative industries, including those in non-creative jobs and the number of people employed in the overall creative economy.

- Exports – This indicator provides estimates of exports and imports of services and exports and imports of goods by DCMS sectors.

- Business demographics – This indicator provides estimates of the number and sizes of businesses within the DCMS sectors.

Regional data published by the DCMS in 2018 and 2019 also measured the GVA of the creative industries for the North East, North West, Yorkshire and the Humber, East Midlands, West Midlands, East, London, South East, South West, Wales, Scotland and Northern Ireland. National and regional economic indicators are tracked over time to analyse growth trends.

- Nesta's Creative Nation report provides more detailed statistics and economic indicators at the regional level for creative clusters. Data such as the percentage of regional employment in the creative industries, the number of businesses in each creative sector, GVA contribution to the local economy and the number of high-growth creative businesses are provided. This is a useful resource for ascertaining detailed information about a particular town or city.

THE PROS AND CONS OF MAPPING THE CULTURAL AND CREATIVE INDUSTRIES

Advantages

- In summary, mapping unites the disparate cultural and creative sector and proves its commercial and economic value. This gives more strength to arguments that CCIs should receive more support and investment. It provides the tools to track the trends and identify any

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barriers to the sector's growth, meaning that those working to support the sector can design appropriate interventions to overcome those barriers.

- The ability to have a suitable and updated survey and database containing useful data for future policies, programmes and aids.
- The possibility to feed database with new information in order to carry out a study of trends.
- Reliable source of information to take into consideration when creating new programmes and aids
- A way to monitor the sector's evolution.
- A tool to evaluate the impact of newly created programmes and aids.

For example, the mapping of the UK's creative industries showed that they are made up of many very small firms and sole traders who often work very collaboratively, as well as a handful of very large, often multinational companies. Policy interventions have since been more specifically designed to support the needs of smaller businesses, such as designing events which have a strong focus on networking, business administration skills and work to facilitate a more easily accessible investment landscape for small businesses.

Mapping can be used in creating

- local economic development strategies
- urban marketing strategies
- revitalisation of city districts
- promotion of tourism
- development of industry clusters
- innovation strategy
- competitiveness and entrepreneurship strategies
- cultural strategy
- cultural exchange and cooperation policies
- cultural heritage protection policies

Disadvantages

- A possible problem with mapping is that it can be costly and time consuming to carry it out. It can take a long time to collect the data required and the process of mapping involves complex statistical analysis, which will likely require qualified statisticians.
- In addition, as there is no universally accepted method for mapping or data collection, there can often be inconsistency in the data collected and in the way data are interpreted and mapped. This means that comparisons between regions are not always possible or, if comparisons are made, can draw false conclusions.
- Difficulty in establishing a common definition of CCIs among different countries.
- Absence of unification between public administrations when determining the NACE codes included in the sectors.
- There is no single responsible organisation that would coordinate the mapping activities across the Czech Republic, so the information is fragmented. Moreover, the data from mapping are not sufficiently used.

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WOULD YOU CHANGE THE PROCESS OF MAPPING IN YOUR COUNTRY IN ANY WAY?

Czech Republic

According to some institutions, there are negatives related to NACE code classification. The negatives include inaccuracy, insufficiency and unavailability of collected data. Moreover, the companies being registered as creative companies with specific NACE codes do not always employ employees who can be considered creative, as there is always somebody working in, for example, the support department, etc. Another NACE code-related issue is the use of the four-digit level. This is considered be meaningful and a cause of significant incongruity with the data. Thus, the suggested approach is to use three-digit level codes. Another suggestion is to cut out mapping of crafts, since crafts cannot be properly mapped and there is a problem with crafts being considered creative or not. A suggestion is to conduct mapping of single sub-sectors instead. Another suggestion is to discontinue qualitative mapping, for the needs of which there may be separate projects. However, there are also institutions would not change anything in the methodology used to date.

United Kingdom

Mapping in the creative industries could be improved by introducing greater depth of the data collected, including more detailed economic indicators. Mapping at regional level could be more widespread and consistent. One possible way to do that is for the government to make mapping a requirement of LEPs. A universal methodology could be developed which uses the same economic indicators for each region, thus ensuring consistency. This would allow direct comparison between different regions. It would facilitate a more consistent regional policy approach to the creative industries and facilitate learning and knowledge sharing between organisations working in different parts of the UK.

Basque Country

Thanks to previous experience with mapping the CCIs of Bizkaia, there are some aspects to bear in mind:

- Difficulty in making the final research as real as possible, trying to obtain a representative sample of the sector.
- Difficulty of incorporating the methodology of mapping activities to make it a part of the annual procedures of the public administrations. Nevertheless, thanks to the European Creadis3 project, this issue could be resolved, as a precedent has been set for it.

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SUMMARY OF TASK 1 – WHERE ARE WE?

	United Kingdom	Czech Republic	Basque Country
Definition	Uniform definition	Still no uniform definition	Uniform definition
Methodology	Uniform methodology	Certified mapping methodology, new methodologies are still arising	Uniform methodology
Sub-sectors	Uniform sub-sector. There are institutions that gather all actors from each sub-sector.	Still no uniform sector, effort to unify sub-sectors, especially to unify people in them	Uniform. There is multilevel governance where the relationship between the different agents of the sub-sectors is coordinated.
Digitisation	Digitisation incorporated into the mapping	ICT and software not included in the annual mapping conducted by NIPOS, but usually included in regional	Digitisation incorporated into the definition and the mapping
CCIs X Creative economy	Analysed total value of the creative economy (including creative jobs not included in the creative industries)	Only CCIs analysed (excluding the whole creative economy)	Only CCIs analysed (excluding the whole creative economy)
Usage of Codes	Usage of SOC (Standard Occupation Classification) codes and SIC codes (equivalent to NACE codes)	NACE codes	NACE codes
Responsibility for mapping	Government (DMCS) a. annual national estimates b. regional mappings LEPs a. regional mapping Nesta a. detailed mapping	Czech Statistical Office (CSU and NIPOS –Ministry of Culture) • annual mapping (economic contribution) IDU (Ministry of Culture) • several mapping projects, certified methodology, ad hoc mapping Other institutions (universities, regions, etc.) • ad hoc mappings	Regional Government of the Basque Country in collaboration with the Bizkaia, Gipuzkoa and Araba County Councils and the Bilbao, Donostia and Victoria City Councils
Funding of mapping	Public funding	Public funding (governmental, grants, regional)	CREADIS3 European project. Future mapping activities will be carried out with funding from the Basque Governments own budget.
Frequency of mapping	Economic contribution – annually Local mapping – every three years	NIPOS and CSU – annually IDU and others (local mapping) – ad hoc	To date, once (twice withing during the European project), future goal: biannually
Usage of mapping documents	Government – national strategy, Creative Industries Sector Deal, targeted support schemes LEPs – industry support policies Trade bodies – additional support, demonstration of the results	The usage of the mapping results is still undervalued.	The usage of the mapping documents is at the Basque Government level.

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Awareness, where the CCIs stand	Understanding by politicians, journalists, investors, academics and government officials	Effort to introduce CCIs to politicians, journalists, investors, academics and government officials	Understanding by politicians; efforts needs to be made to communicate to the business network, society and education and to general investors.
Policy	Specifically targeted policy	Slowly incorporated into the strategies	Specific policy promotion linked to the strategy of the territory. Not enough influence in investment strategies.
Clusters	Existence of clusters	Only one cluster (in the city of Zlín)	Existence of an audio-visual cluster (Eiken) and associations for each sub-sector.
Organisational responsibility for the Mapping	Strong infrastructure Nationally: • DCMS • The Creative Industries Council • Creative England • The Creative Industries Federation • ScreenSkills • Trade body for each sub-sector (The Crafts Council, The Design Council, etc.) Regionally: • LEPs (Growth Hubs)	Unstructured infrastructure Nationally • Cultural industries – Ministry of Culture, IDU • Creative industries – partly Ministry of Culture, responsibility of is Ministry of Industry and Trade is being discussed, no umbrella association for all CCIs • Associations for sub-sectors (not all of the sub-sectors have their own association that would ensure the stability and cooperation)	The Basque Government has responsibility for the mapping process, supported by Orkestra (Basque competitiveness institute), regional governments (county councils of each region) and local governments (city councils).

RECOMMENDATION FOR THE CZECH REPUBLIC

The Czech Republic still does not have a uniform definition; even among professionals involved in the CCIs, there is no agreement on the same definition and classification. It is necessary to finally formulate a uniform definition and classification and incorporate them into to the strategic documents (such as the State Cultural Policy, all mapping documents, the strategies of the government, regions and cities, etc.). Only with a single, uniform definition will there be a rise in awareness of the CCIs and their subsequent recognition. Furthermore, despite the opinions that the classification in mapping might differ according to the region and its prevailing sub-sectors, we suggest defining a uniform methodology with the same classification. Only when the methodology is uniform is there a possibility for comparison of spatial evolution as well as evolution in time.

The annual mapping is carried out by NIPOS and the Czech Statistical Office. However, not all of the CCI sub-sectors are included and the data related to the NACE codes are insufficient and inaccurate. The local regional mappings have been carried out on an ad hoc basis depending on the will and effort of the responsible institutions. Therefore, the Czech Republic should take inspiration from the United Kingdom and carry out regional mappings on a regular basis. There should be only one responsible institution in the case of annual national estimates as well as regional mappings, as in the United Kingdom, where the responsible institution is the DMCS. However, the central mapping should be carried out in cooperation with stakeholders and local experts.

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With respect to NACE codes, in comparison with the partner countries, there are a lot of NACE codes included in the mapping. However, not all of the activities can be classified as creative and their relevance to the CCIs is debatable. The suggested idea is to carry out and analysis like the one in the United Kingdom involving determination of the creative intensity of professions and thus choose relevant occupations. With this approach, there would be a possibility to carry out mapping relating to the whole creative economy as well.

The mapping results should be properly used by stakeholders to demonstrate their influence on the economy. It is necessary to demonstrate the economic contribution of the CCIs as well as its multiplying effect.

The CCIs in the Czech Republic are fragmented. Not all of the sub-sectors have their own association that would help with forming the legislative, social and financial environment for the development of the sub-sectors and act and negotiate with others on their behalf. It is important to harmonise the common goals within the sub-sectors and subsequently harmonise the common goals within all of the CCIs and ensure that there is an "umbrella" institution that would guarantee the development of the environment for all of the CCIs.

RECOMMENDATION FOR THE BASQUE COUNTRY

The main recommendations can be summarised in the following ideas:

Continue with the mapping activities periodically (a biannual period is already established).

Define new indicators to measure the indirect impact of the cultural and creative industries on other sectors so as to have a tool to obtain results and to analyse the real situation and value added of these industries.

As a result, this type of analysis will serve as a reference to communicate the real value of the CCIs to the business network. The final objective will be focused on the creation of multisectoral gathering spaces, where the real value of the CCIs and their potential influence on industrial sectors are highlighted.

USEFUL REFERENCES:

Information about the Creatinno project: https://www.czechinvest.org/cz/O-CzechInvestu/O-nas/Interni-projekty/Creatinno

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Analysis of Support Programmes

GROW TALENT AND BUSINESS

Types of programmes: 1. Mentoring, 2. Workshop, 3. Competition, 4. Accelerators, 5. Co-working spaces

Grow Talent and Business		
Types of support programmes	**Programmes**	**Sectors**
Mentoring	EFA	Fashion
	SoundCzech	Music
	Training programme Prestaekin	Multisectoral
	Bizkaia mentoring programme	Multisectoral
	iFeatures film production lab	Film
	ShortFLIX	Film
	JIC PLATINN	Multisectoral
	Evolve	Multisectoral
Workshops	Creative Kickstart – Wakefield	Multisectoral
Competition	Bridge to Mass Challenge Biscay	Multisectoral
	Creative Business Cup	Multisectoral
Acceleration process	Acceleration	Multisectoral
	KSI BERRITZAILE	Multisectoral
	CIC Cambridge	Multisectoral
	Design Council Spark	Design
Co-working spaces	SOSA	Multisectoral
	Bilbao international art and fashion	Fashion design
	Bizkaia Talent	Multisectoral
	APA scholarship	Film
	The Sharp Project, Manchester	Multisectoral

1. PROGRAMME – MENTORING

DESCRIPTION

Mentoring programmes are designed to support SMEs and start-ups in accelerating their business projects through development of the necessary skills to access new markets and networks, build innovative new products and grow their business. An analysis from the three project partner countries showed a range of mentoring programmes on offer to businesses across various stages of growth and various sub-sectors of the creative and digital industries.

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Programme users can receive one-on-one or group mentoring from industry experts and access to professional and investor networks. Examples of common mentoring topics include business diagnostics, analysis and assistance with formulation of a business plan, technical assistance with product development, market visibility, price setting and valuation of intellectual property and marketing and publicity.

Mentoring is particularly important in the cultural and creative industries. Research suggests that creative businesses do not, in general, access regular business support and generic business networks. This is due to creative enterprises viewing themselves as a group apart from other business sectors, with different motivations, cultures and business models, and thus want to access sector-specific support programmes.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Sessions don't have to be a major commitment. They can be short and easily fit around a busy business schedule.	Bringing in an experienced mentor can be costly, so programmes with limited financial resources can struggle to get quality mentors.
It is easy to make the design of the mentoring programme flexible and tailored to the needs of specific businesses. The programme is thus easily adaptable to the needs of each company.	Some of the analysed mentoring programmes required participants to be registered companies. Many professionals working in the game industry are freelancers and not "registered companies", thus they do not have a possibility to qualify for some projects with special requirements. This leads to significant consumption of time when preparing the business to enter the project.
A broad network of partners can be drawn upon as mentors, so this doesn't have to be too much of a time commitment for them.	Matching businesses to appropriate mentors is very time consuming.
	Due to the high intensity of the support provided by the programme, the time and financial resources are very limited. This often means that only a small number of participants can be supported.

PROGRAMME CASE STUDY

IFEATURES FILM PRODUCTION LAB

- Institution: Creative England
- Sector, type of business: Film
- https://www.creativeengland.co.uk/ifeatures/

Co-funded by the Horizon 2020 programme of the European Union

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 823677.

iFeatures combines funded project development with intensive high-level training, mentoring and dedicated support with established industry professionals to guide original new films to market.

2. PROGRAMME - WORKSHOPS

DESCRIPTION

The second type of support programmes covers workshops, which usually include group learning activities where the participants can learn through sharing their own experience and knowledge and they come to conclusions that can be useful and applicable for them. The workshops should deepen and broaden participants' knowledge through the use of different techniques and interactive tasks. Workshops can be broken into different activities, including experts' presentations, questions and answers on different topics, mentoring sessions and networking.

Notably, some mentoring and workshop programmes are combined with the possibility of receiving money for product development or give companies an opportunity to present their products to potential investors in order to develop new connections and break into new national and international markets.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+
Workshops with multiple participants can reach more businesses more cost effectively.
Workshop content is adaptable to the needs of the companies and sub-sectors involved.
In some cases, workshops are conducted free of charge, so they are an interesting way for companies to enhance certain aspects of their business, share their knowledge and learn from others (other companies, experts or coaches), all free of charge.
In a cohort workshop programme that is regularly re-run, mentors from previous cohorts can be called upon to give valuable insight.
Group mentoring and workshop sessions can also act as networking opportunities and help businesses to build strong peer networks.

-
Cross-sectoral workshop sessions may have less relevance for some businesses and may not be able to give the specific advice that the businesses want.
It can be costly and difficult for some businesses, especially smaller ones with very few staff, to take part in half-day or longer workshops.
Where workshops are a one-off intervention, it is hard to build relationships with businesses or support their detailed progression.
Workshops need to be promoted heavily to get enough businesses to attend – this can take up a lot of the workshop budget.

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BEST PRACTICE ADVICE: MENTORING AND WORKSHOPS

Some top recommendations when designing a mentoring or workshop programme to grow talent and business in the cultural and creative industries are:

- Before designing a mentoring or workshop programme, it is crucial to map the regional support ecosystem in which you plan to provide your support. It is recommended that you perform extensive scoping research before planning the workshop in order to guarantee that the business support is in tune with the needs of the sector in the particular region, targets for engagement are set appropriately and the workshop does not duplicate what is already there.
- If the programme is an annual or long-running programme, bringing alumni back to engage with, i.e. mentor or advise, the current participants is incredibly useful. Peer-to-peer learning and specific experiential support can often work better and also provides an opportunity to create networks and connections for current participants.
- Social media can be a useful tool to reach beyond the usual networks that might engage with opportunities in the creative and digital industries.
- It is useful to engage with all of the institutions in the creative cluster across the region. When there is limited engagement with local stakeholder organisations, there may be low awareness of the project, which can lead to limited engagement and wasted resources and overlap between support programmes.
- It can be most valuable to separate business support streams according to operational stages and sub-sectors, as not all creative businesses require the same kind of support. Early-stage start-up businesses will often require very different business advice and skills than well-established businesses and those looking to scale up. Taking time to attend workshops can be costly for small business owners, so it is important to conduct more focused workshops that are appropriate for the particular size and needs of the participating businesses.
- Workshop and mentoring themes and speakers should be very specific and tailored to the needs of the local businesses. Creative businesses are diverse and have unique skill requirements, so it is important to target workshops to your audience.

PROGRAMME CASE STUDY:

1. CREATIVE KICKSTART – WAKEFIELD

- Institution: Creative Industries Federation
- Sector and type of business: IP-based businesses, spanning all sectors
- Number of supported companies: 60 creative businesses
- Financial allocation for the whole programme**: £15,000**
- **https://www.creativeindustriesfederation.com/news/creative-kickstart**

A half-day workshop, part of the Creative Kickstart series of workshops, which was a commitment in the Creative Industries Sector Deal. Eight similar workshops were planned in regions outside of London. The workshops were broken into three sections: expert speakers and Q&A (on access to financing in Wakefield), breakout mentoring sessions with major creative business leaders and networking at the end of the day.

2. EVOLVE

- https://www.coventry.ac.uk/cuse/programmes/evolve/

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 823677.

Run in partnership with UKBAA, Evolve is a cohort programme of 20 companies from across the English regions that are seeking investment to grow and succeed. Through a series of one-on-one sessions, investor introductions, pitching platforms and combined peer-to-peer working groups, the six-month programme gives high-growth potential businesses the support they need to access investor networks and the skills and expertise that will enable them to better attract investment in order to expand and develop new products.

The programme prepares companies for investment through a four-stage process:

1. Diagnostic – In-depth business diagnostics and analysis of their performance and investment offer.
2. Plan for Growth – Addressing weaknesses/opportunities through relevant growth strategies.
3. Finance Growth – Establish investment goals, plan how to finance growth and create an effective proposition.
4. Growth Execution – Facilitation of investor introductions, pitch sessions and implementation of innovation cycles.

3. PROGRAMME – COMPETITION

DESCRIPTION

Like mentoring and workshops, competitive programmes also have the general aim of fostering business growth for SMEs. Competitions provide space to create a vivid environment where the participants endeavour to do their best to succeed. A competition might include activities such as workshops, bootcamps, conferences or a final pitch competition. Some competitions are divided into regional, national and international rounds. Participants strengthen their capabilities and get the opportunity to network with other participants, connect with investors and reach global markets.

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STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Competitions can provide an international network of partners.	Limited finances can limit the reach of a competition.
Tailored training and workshops can be integrated into the given competition.	Some programmes and competitions require major dedication and the willingness to go abroad for a period of time (sometimes long periods). Depending on the type of company and its size and resources, it can be difficult to combine the stay in the bootcamp with the daily routine and duties of the job.
Individual mentoring from experienced international experts.	
Access to the given city's business ecosystem.	
A good way to arrange initial business contacts in a new country or ecosystem.	
Competitions can be a great profile-raising opportunity for businesses.	

BEST PRACTICE ADVICE

- More specifically focused competitions often produce better results. Have a competition focused on one particular subsector, e.g. film, games, etc., and specific the conditions and criteria fully in advance.
- A good idea is to organise an international competition that gives an opportunity to create a broad network of participants, partners and investors. That can result in a great contribution to the SMEs' development possibilities.

PROGRAMME CASE STUDY

BRIDGE TO MASSCHALLENGE BISCAY

- Institution: Bizkaia and Gipuzkoa County Council, Beaz S.A.U., MassChallenge
- Sector and type of business: multisectoral
- Number of supported companies in the four editions in Bizkaia (130 applications, 42 start-ups advanced to the bootcamp in Boston, five start-ups reached the worldwide final and gained access to the four-month acceleration programme). In the case of Gipuzkoa, each year five companies take part in the bootcamp in Boston and one of those five goes to the final round to compete for a place in the four-month acceleration programme.
- http://more.masschallenge.org/biscay

Bridge to MassChallenge Biscay is an international start-up competition that identifies and accelerates the top start-ups in Biscay and Gipuzkoa and connects those start-ups with the global market and MassChallenge's global network. Following the regional application process, selected

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start-ups participate in an intensive, multi-day, all-expenses-paid bootcamp in Boston, where they receive:

- Tailored training and workshops
- One-on-one mentoring from top international experts
- Networking opportunities
- Unique access to the city's business ecosystem

A final pitch round during the bootcamp determines the top four teams to advance to the semi-final round of the global MassChallenge competition.

To sum up in a nutshell the stages of the offered service:

- Application to the programme
- Online assessment by an international jury from MC (25 semi-finalists chosen)
- Semi-final held in Bilbao (Beaz S.A.U.)
- Fifteen finalists chosen by a local jury from Bizkaia and Gipuzkoa for the bootcamp in Boston
- One week bootcamp held in Boston
- Four finalists chosen to attend the final worldwide round
- Final worldwide round for the four-month acceleration

4. PROGRAMME – ACCELERATORS

DESCRIPTION

Within the programmes related to the Acceleration Process, companies are selected and provided with an acceleration programme. The duration of such programmes is usually a few months, during which the companies receive different kinds of support enabling them to enhance their business. The activities include mentoring, workshops, seminars, consultancy, etc. The acceleration programme can be suitable for start-ups as well as scale-up companies.

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STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Accelerator programmes can often offer free office space.	The six-month duration requires a major commitment.
Access to a huge ecosystem	Accelerators should be domestic programmes only. It is very difficult to run accelerators internationally due to different working hours and time zones.
Personalised advising	In some cases, the acceleration process abroad requires a certain amount of money for accommodation and travel, which can be difficult for the company.
Access to international investors	
The support package can often be adaptable to the needs of the given company.	
Flexibility of the service in terms of dates arrangement.	
A good way to arrange initial business contacts in a new country or ecosystem.	
A first step for the internationalisation process of the given company.	
Businesses receive very intensive support for a period of time, often resulting in high growth.	

BEST PRACTICE ADVICE

- Acceleration programmes create a friendly environment with close connections between the participants. Moreover, if the participants are provided with free office space shared with other companies, either from the same industry or from a field that can offer contributory services and advice, that boosts the development of the companies, enables knowledge sharing and offers an opportunity to form clusters.

PROGRAMME CASE STUDY

1. ACCELERATION

- Institution: BEAZ S.A.U.
- Sector and type of business: multisectoral
- Number of supported companies: 10

Companies working on projects with high growth potential are identified and accelerated thanks to the support of expert advisors.

The duration of the acceleration process is six months and every procedure is adapted to the specific needs of each company. In this way, specific action plans are formulated and carried out in order to fulfil the specified objectives.

The service also includes measuring the impact of the acceleration process and the results achieved.

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The services offered are divided into two main areas:

- **Development of new markets**: entry into a new country / search for suppliers and clients, finding the company's strengths, development of new franchised models, etc.
- **Development of new business lines:** sectoral diversification, business model definition and analysis, definition of price and business expense models, etc.

The call is open throughout the year.

Example of Best practices:

- Graci luxury children's wear: international expansion (Middle East)
- Relevo video games: launch of the game Baboom in the United States; search for a publisher in the United States
- Sophie et voilà: best junior designer in BCN Bridal Week 2019
- Mercedes de Miguel: Expansion in China; search for a distributor or multi-brand shop in China

2. KSI BERRITZAILE

- Institution: Department of Culture and Language Policy of the Basque Government

Programme addressed to Basque Creative and Cultural Industries with the aim of creating and developing areas of opportunity for new projects in three lines of action:

- **Technological innovation**

This line is focused on the promotion of technology transfer from technology centres such as Tecnalia and Vicomtech to creative and cultural industries (CCIs) in order to create innovative products and services for global markets and to create synergies and new opportunities and developments.

- **Organisational model innovation**

The second line focuses on organisational model innovation and the improvement of the management system of CCIs in order to improve the competitiveness of businesses and enhance the professionalisation of the sector with the collaboration of Euskalit.

The support programme is divided into two phases:

- Phase 1: Management diagnosis

The companies carry out a self-evaluation of their respective management systems, comparing it to the model of an advanced management system. The strengths and weaknesses of their models are identified and the improvement priorities are determined.

- Phase 2: Improvement of management

Once the first phase has been implemented, two different improvement methods can be applied:

  - Training: two-level training (basic and advanced)
  - External advisory support: up to 25 hours

- **Financial training for companies**

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This axis includes two different services promoted by the Department of Culture and Language Policy of the Basque Government together with Elkargi SGR: Economic-financial Training programme and Diagnostic Service and Financial Support.

3. DESIGN COUNCIL SPARK

- Institution: The Design Council
- Sector and type of business: Design
- Number of supported companies: Intensive support for ten companies per year
- https://www.designcouncil.org.uk/what-we-do/programmes/design-council-spark

Design Council Spark is a 16-week UK support programme and investment fund designed to help individuals and businesses through the process of turning a design idea into a product. Spark is the Design Council's product innovation fund, which helps inventors to accelerate their ideas to market. Participants in the programme are provided with intensive support from the Design Council delivery team throughout the programme and a variety of expert mentors. A shortlist of candidates attend a two-day design bootcamp, where ten finalists are selected each year to participate in five workshops led by design experts as well as to receive one-on-one input and access to the Design Council's alumni network. The participants receive an initial sum of £15,000 to help develop their products and the opportunity to pitch to an investment panel for a share of up to £150,000 in funding to fast track their products to market.

The programme exists to help participants overcome some of the challenges facing small-scale inventors in the UK, including:

- Difficulty bridging gaps between ideas/market/manufacture
- Product-focused business is less attractive to investors
- Lack of seed funding for ideas (the idea stage is very early for funding)
- Lack of confidence, knowledge and motivation among designers and inventors
- Lack of access to the right advice at the right time
- Fewer physical product successes from the UK
- Support for product start-up businesses has stopped
- Investors are not equipped to deal with early-stage ventures (investment tends to focus on tech, as it gets to market faster)

5. COWORKING SPACES

DESCRIPTION

A coworking space is a meeting point and essential environment where companies can share their knowledge and experience and help each other. It fosters collaboration between entrepreneurs, corporations, start-ups, investors and universities. Another potential benefit is the greater visibility of talented people and companies in relation to stakeholders, the general public and the media. Coworking spaces provide a connection with the public, academics and industry experts worldwide. As

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a result, they can evolve into the creation of other activities that may be further developed, such as contests, forums, conferences, festivals, training courses, establishment of new companies, etc.

Coworking spaces can often offer incentives for businesses to establish operations in them, such as business rate reductions and free access to mentoring. Having a high concentration of start-ups, all located close to each other and with formal links to research organisations, often naturally leads to collaboration and knowledge sharing and thus the formation of clusters.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+
The programme can provide formal links to academics and experienced professionals.
Shared working spaces allow freelancers and microbusinesses the opportunity to work alongside others, thus preventing isolation.
Commercialisation can be easier to achieve though connections made in the shared space.
Opportunity to establish cooperation between the participants.
Encourages the establishment of networks and collaboration between freelancers and businesses.
Flexible space allows start-ups access to facilities at a low cost, e.g. meeting rooms, tech and more office space. This means they can expand easily as they grow.
Businesses and freelancers can often access training and broader support programmes through the coworking hub or shared office space.

-
Only fairly small start-ups can take of significant advantage shared office and co-working spaces.

BEST PRACTICE ADVICE

- One way to support the establishment of a new cluster is to subsidise working spaces or reduce the business rate payments on certain locations. This allows innovative and high-growth businesses to concentrate in one geographical area and to establish necessary connections and relationships for establishing new cooperation.

PROGRAMME CASE STUDY

SOSA

- Institution: Bizkaia County Council, Sosa
- Sector and type of business: multisectoral
- Number of supported companies: 24 applications in the first call; six start-ups stayed in Tel Aviv for two weeks.
- https://info.beaz.bizkaia.eus/tag/sosa/

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SOSA is an open innovation platform that offers a complete innovation ecosystem under one roof. Its location is uniquely designed to foster collaboration between start-ups, entrepreneurs, investors and corporations.

SOSA was founded for the purpose of growing the Israeli business ecosystem by providing selected entrepreneurs with the most supportive go-to-market and global business networking platform. On a daily basis, tech start-ups from the SOSA network are connected with international partners – leading global corporations, investors and governmental entities that are actively seeking disruptive technologies.
In this way, Bizkaia County Council signed a collaboration agreement with SOSA to enhance the connection between start-ups from Biscay and Tel Aviv.

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NETWORKING EVENTS

Types of programmes: 1. Small Networking Events, 2. Large Regional Networking Events, 3. Conferences

Networking Events		
Types of Support Programmes	**Programmes**	**Sectors**
Small Networking Events	Creative England Crew Nights	Screen-based media sector
	Creative England Creative Enterprise: Networking with Norwich Film Festival	Film
Large Regional Events	Creative England: Angel Investor Event	Screen-based media sector
	Communication Platform	Multisectoral – mostly design
	Be Creative. Be Innovative.	Multisectoral – mostly design
	Be More's events – Creative England	Screen-based, gaming, digital sector
	Creative City	Multisectoral – mostly design
Conferences	BIME: international music conference and festival	Music-related technology
	Game Access conference	Gaming
	Serifalaris	Graphic design
	Createch conference (part of London Technology Week)	Creative and digital technology
	AHRC Creative Economy Beyond Conference	Multisectoral

1. SMALL NETWORKING EVENTS

DESCRIPTION

Networking events bring together freelancers and business leaders from similar sub-sectors to make connections, establish collaboration and build networks. They are particularly important for the creative sector, as it is made up of a lot of freelancers and microbusinesses, and work often comes through personal recommendations. Smaller events often involve sharing a meal or coffee, but the form is very flexible and can differ according to the occasion and time.

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STRENGTHS AND WEAKNESSES: SMALLER NETWORKING EVENTS

+	-
Small networking events provide a less intimidating environment for individuals to make connections – some people may be intimidated by larger events with a lot of people.	Smaller events need a lot of work to get people to attend.
For smaller, more exclusive networking events, positions are often booked by invitation. This makes it more likely that attendees are professionally relevant to each other and useful connections will be made.	To keep an event intimate, the number of participants must be limited, which means the event can only benefit a small number of people.

BEST PRACTICE ADVICE

- It is often worth organising a networking event as a follow-up of a bigger event, such as a showcase, film festival or screening event. Small businesses and freelancers often have incredibly busy schedules and only very few staff, which makes it costly for them to take time off. Therefore, they appreciate the effectivity of such related events.
- It is a good idea to include the risks and possible failures related to the discussed topics, which could trigger deeper discussion and brighter insight into the issue, and bring caution to other participants.

PROGRAMME CASE STUDY

CREATIVE ENGLAND CREW NIGHTS

- Institution: Creative England
- Sector / participants: Crew, facility houses and production companies across the film, TV and digital sectors
- http://www.spacestudiosmanchester.co.uk/creative-england-crew-night/

These networking nights happen regularly around the country with the purpose of connecting crews across all job grades either working in or aspiring to work in film and TV. Freelancers, production companies, broadcasters and studio representatives working in the local area meet to establish new relationships and find out about local opportunities in the sector. They are free to attend and drinks and small refreshments are usually provided.

2. LARGE REGIONAL NETWORKING EVENTS

DESCRIPTION

Larger networking events often bring together many freelancers, sole traders and small business leaders, as well as others invested in the sector. The topic is not always set and can differ according to the occasion, the needs of the stakeholders within the region or currently discussed issues.

The purpose of the programme can include growth in awareness of and interest in the CCIs, showcasing of the work of professionals, creation of an environment stimulating innovation and increase of the intensity of cooperation between the public, private and academic sectors. The challenge is to connect creative people with companies, academics, investors, business angels or other institutions. These

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programmes encourage new collaboration and sharing of industry news, knowledge and experience. This may involve seminars and communication platforms in the form of speed dating, business showcases, roundtables, panel discussions, presentations or speeches.

These networking opportunities are often included as part of a bigger event such as a festival or competition, as discussed in the next section.

STRENGTHS AND WEAKNESSES: LARGE NETWORKING EVENTS

+	-
Large networking events provide an opportunity for freelancers and businesses to make many connections that they would not have been able to make previously.	Large networking events can be time consuming and use a lot of resources to properly market the event and get enough people in the room.
Such events also raise the profile of CCIs in regions and create a sense of cluster identity.	For a big event, catering and speakers can be costly.
Flexibility of the programme design	Big networking events are often held fairly irregularly.
Opportunity to reach out to private investors who work in finance and who would normally not get involved in the cultural and creative industry.	A one-day event does not add enough value to justify coming to the area, hosting an event and then leaving.
Inviting representatives of successful, high-growth businesses to come and speak generates excitement and interest around the sector.	Events can be expensive and might lack any measurable outputs, so it is hard to judge how successful they have been.
Great opportunity to build relationships and regional pride so that businesses are more likely to stay and continue operating there.	Even if they register, people are not obliged to turn up or they can drop out in the course of the event.
Enhancement of cooperation between different stakeholders.	
Public involvement	

BEST PRACTICE ADVICE

- It is often good to have networking events targeted at specific audiences. Be clear about the event's objectives and the audience you are targeting.
- If a national body is organising a regional networking event, it should draw on the expertise of people from the region in planning and scheduling the activities. It can be very beneficial to work with local stakeholders to identify cluster themes and the audience. It is often worth organising a networking event as a follow-up of a bigger event, such as a showcase, film festival or screening event. Small businesses and freelancers often have incredibly busy schedules and only very few staff, which makes it costly for them to take time off. Therefore, they appreciate the effectivity of such related events.
- It is good to include some kind of follow-up as part of your event planning in order to allow attendees to build on the connections made at the event.
- It can be effective to host a roundtable with regional decision-makers to discuss the strengths of the region and the issues to be addressed in the future.

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PROGRAMME CASE STUDY

CREATIVE ENGLAND: EVOLVE INVESTOR NETWORKING EVENT

- Institution: Creative England
- Sector / participants: Private investors and small creative businesses seeking investments
- Sector / speakers: Finance sector and screen-based business
- https://www.creativeengland.co.uk/investment/

The evening event features guest speakers and panel discussions exploring the opportunities for investing in the creative industries for private investors and business angels. It is designed to promote the creative industries as an exciting investment opportunity and promote the success of the creative sector.

3. CONFERENCES

DESCRIPTION

Conferences are usually based around a theme, creative sector or a particular region and can include speeches, discussions, demonstrations and sometimes workshops. They may be one-off events or take place on a regular basis.

Conferences in the cultural and creative industries are mostly intended to allow participants to exchange experience, meet other participants or to understand a specific policy issue within a certain industry. They can often involve roundtables, panel discussions, talks from industry experts or different workshops and lectures aimed at enhancing entrepreneurial skills. Conferences often include networking coffees and breakout networking sessions, which can be very useful for participants in terms of building relationships across creative sectors.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Conferences can deliver multiple things to numerous people at the same time.	Conferences can be very expensive to organise.
Presenting or exhibiting at a conference is an excellent way for businesses to raise their profile.	It takes a lot of planning and resources to get high-quality content.
Conferences are a great way to make connections and bring people with similar interests together.	There are no easily measurable outcomes, so it is hard to judge the success of conferences.

BEST PRACTICE

- It can be beneficial to include mentoring opportunities in the event programme covering areas like business management or the production process in order to promote the competitiveness of creative entrepreneurs.
- Hosting conferences as part of an ongoing project or programme can help to spark interest in the programme and keep people updated on progress, e.g. The AHRC creative clusters programme and conference.

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- Providing the right conditions for networking during breaks in a conference can be important for the success of such networking goes. For example, a large space with good acoustics and with food and drink provided, badges for guests with their name and place of work.

PROGRAMME CASE STUDY

CREATECH CONFERENCE (PART OF LONDON TECH WEEK)

- Institution: The Creative Industries Council
- Sector / Speakers: All creative and digital technology sectors, speakers from government departments, large businesses, the Premier League, Facebook, panel discussions with experts, breakout sessions on specific subjects such as finance for early-stage businesses and protection of intellectual property.
- https://www.thecreativeindustries.co.uk/industries/createch

Createch is the biggest event focused on the creative industries at the annual London Technology Week. It is coordinated by the Creative Industries Council (CIC). The CIC represents all of the different creative sectors, so Createch can showcase the best of what is happening in tech across the spectrum, from film to fashion, crafts to culture, advertising to architecture, design to gaming and more. International partners and investors are invited and the event provides an opportunity for agencies to expand their network of creative partners and for the UK to develop investment and strategic relationships with other nations.

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PROMOTION OF CCI

Types of programmes: 1. Large city/sector-wide festival, 2. One-day festivals, 3. Websites as a form of information sharing or connecting, 4. Promotion abroad

Promotion of CCI		
Types of Support Programmes	**Programmes**	**Sectors**
Street festivals	Landscape Festival	Architecture, design
	Art District	Art
	Dweek	Multisectoral
Festivals	Fun and Serious Games Festival + FS Play	Design
	BIME: international music conference and festival	Music-related technology
	ZINEBI	Audio-visual
Web	Creative Czechia	Multisectoral
	CzechDesign	Design
Promotion abroad	Design for Competitiveness	Design
	IT Internationalisation programme	Multisectoral
	JIC MASTER	Multisectoral
	Market Trader	Film

1. LARGE CITY/SECTOR-WIDE FESTIVALS

DESCRIPTION

Within these types of programmes, cultural and creative activities are promoted and celebrated in the city/town and these events evolve into a close connection of local culture, citizens and other entities involved in the programmes. The objectives of the programmes include promoting a change in the way art is consumed and promoting its cultural and social value, its potential and its capacity to produce employment, development and wealth. Organization of such festivals requires close cooperation with the sector itself, local municipalities and other stakeholders.

Festivals can take place annually and their duration might be several days. The programme may consist of different activities such as conferences, workshops, exhibitions or other activities that might take place at different locations across the territory.

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STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Long festivals can have a lasting impact on the local economy and really build a sub-sector in the given region.	An annual festival may have to adapt to new conditions every year, making organisation complicated.
Large festivals have an international character and recognition.	Difficult permitting process
Close cooperation of different stakeholders often involving the public and private sectors. Collaboration can lead to positive lasting relationships.	With large annual festivals, such as the European Capital of Culture, which require locations to bid to win them, the bidding process can be costly and time-intensive, having a negative impact on the cities that do not win for the cities that do not win.
Involvement of citizens in the event	High degree of investment required from the city/town where the event takes place
Festivals are a good way to promote and enhance activities related to the cultural and creative industries and make them known in the country.	

PROGRAMME CASE STUDY

LANDSCAPE FESTIVAL, CZECH REPUBLIC

- Sector / Participants: The public, designers, architects, public sphere
- Sector / Speakers: Architects, designers, foreign architects and designers, university teachers
- https://www.landscape-festival.cz/en/about-project

In the Czech Republic, landscape architecture still does not have its rightful status and its importance in relation to urban planning and public space design is still unappreciated. According to the organisers, the main aim of the festival is *"to increase awareness of the potential, purpose and significance of the field of landscape design in relation to contemporary architecture, art and public spaces. The Landscape Festival project aims to both enlighten and cultivate an interdisciplinary dialogue among Czech and international experts, artists, public officials and the broader public.*

The festival seeks to underscore the importance of public spaces and greenery in urban spaces through architectural interventions and artistic installations, exhibitions, debates and happenings. The event purposefully seeks out notoriously dilapidated urban areas that hold the potential of being transformed into new hubs of cultural and social activities. Via site-specific installations and cultural happenings, the festival seeks to revive, cultivate and highlight future development possibilities for such areas. In a broader sense, the festival explores the identities of such locations, responding to inherent issues and underscoring local values."

2. ONE-DAY FESTIVALS

DESCRIPTION

Generally, the aim of these festivals is to celebrate a certain topic. This type of programme helps to disseminate different creative and cultural outputs and to promote the creative industry in general. It creates a platform for professionals, representatives of the public sector and other stakeholders. The

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festival programme includes a range of activities ranging from various cultural events to networking opportunities and conferences.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Often involves public-private cooperation.	Major commitment in the organisation of the event (large number of people attending the event)
Promotion of local production	It can be expensive to run and sometimes difficult to find a sponsor for it.
International character	For a new or lesser-known festival, it takes a lot of time-intensive marketing effort to get a lot of people to attend.
Tool for long-term and ongoing local action	
Numerous activities included in the festival, e.g. networking area, fun zone, conferences, roundtables, award ceremony	

PROGRAMME CASE STUDY

FUN AND SERIOUS GAMES FESTIVAL + FS PLAY

- Institution: The sponsors of the event are Bilbao City Council, Bizkaia County Council, Basque Government, SPRI and BBK
- Sector: Video game industry
- https://en.funandseriousgamefestival.com/what-is-the-fs/

The Fun and Serious Games Festival is the largest video game festival in Spain and has become a point of reference within the industry. Over 25,000 people passed attended the festival last year to take part in its different activities.

The festival's mission is to recognise and promote the work of producers, directors, artists and developers of video games through a comprehensive programme that includes conferences, roundtables, networking and activities for companies as well as for the general public. Every year, the festival ends with an exclusive awards ceremony for the best video games of the year at the Guggenheim Museum.

Among the different activities arranged during the festival, there is a networking area where new relationships are established between all of the players in this industry and the promoters themselves. Many projects are usually passed through the festival, including those that have been launched, found a new path or for which new doors have been opened in this meeting place.

The festival also features a fun zone, where every assistant can play the latest new releases, be thrilled by the excitement of eSports and compete in tournaments for all types of players. Last year, the event took place at the BILBAO EXHIBITION CENTRE (BEC).

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3. WEBSITES AS A FORM OF INFORMATION SHARING OR CONNECTING

DESCRIPTION

A web portal can be the quickest way to communicate news regarding CCIs to the public at large. There can be a wide range of article topics including interviews with entrepreneurs and organisations, news about creative centres and clusters, municipal and regional policy, cultural strategies and concepts, monitoring of activities and trends, job vacancies, new opportunities, etc. Furthermore, a web portal can serve as a platform for communication or consultancy.

ADVANTAGES AND DISADVANTAGES OF THE PROGRAMME

+
Great way to make a lot on information available to people at a low cost
Platform to connect with people in similar industries but different regions
Network of professionals
It can serve for promotion of products.

-
Not enough support from public bodies
Not on regular basis
Not always connected with events/programmes

PROGRAMME CASE STUDY

CREATIVE CZECHIA

- Institution: The Arts and Theatre Institute
- https://www.kreativnicesko.cz/english

The web portal of The Arts and Theatre Institute (IDU) maps and provides information about the cultural and creative industries. The content of the website is edited by the Arts and Theatre Institute and by external experts. Articles are focused on successful entrepreneurs in the CCIs, cultural organisations, creative centres and cities and regions working on cultural concepts and strategies. The Arts and Theatre Institute continues to monitor the needs and condition of cultural and creative industries. The Creative Czechia web portal is one of the forms of communication with the public, sharing examples of good practice and reporting on trends and needs in this area. The main website sections include e.g. articles and news, a description of the CCI from the Arts and Theatre Institute for CCI researchers. One of the important tasks of the editorial team is sharing of information among the Creative Czechia partners – organisations and experts who have been cooperating with IDU since the research project Mapping Cultural and Creative Industries in the Czech Republic (2011–2015).

A British example is the website managed by the Creative Industries Council, https://thecreativeindustries.co.uk/creative-industries, which has news, research resources, facts and figures and opportunities relating to the creative industries.

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4. PROMOTION ABROAD

DESCRIPTION

Within these programmes, entrepreneurs can get a chance to showcase their work at foreign conferences, fairs, festivals, etc. The forms of support include organisational assistance, financial aid (covering conference fees, accommodation and travel costs, etc.) and some programmes may focus on promotion of SMEs' access to and presence on new international markets.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
B2B and B2C contacts	Limited number of exhibitions
Promotion for companies	Ad hoc projects
No need of special selection, no bureaucratic process	Higher costs
Public support	Support on the basis of competitive applications
Financial support	In some programmes, the grant is received after the work or activities have already been done and paid for. This can be a problem for small companies.
Non-repayable grant	
A good programme boosts and encourages small companies to go abroad and get access to new markets.	

PROGRAMME CASE STUDY

1. DESIGN FOR COMPETITIVENESS

- Institution: CzechTrade
- https://www.czechtrade.cz/programy-eu/oppik/design-(1)

CzechTrade is the national export promotion organisation established by the Ministry of Industry and Trade with the aim of developing international trade and cooperation between Czech and foreign entities. CzechTrade offers support for individual expositions at selected specialised foreign events in the form of preferential services amounting to 50% of eligible costs (in the maximum value of CZK 130,000). Companies do not receive money from CzechTrade, but rather services on preferential terms.

2. MARKET TRADER

- Institution: Creative England
- https://www.creativeengland.co.uk/market-trader/

Market Trader is an intensive programme of support designed to help producers and junior sales executives achieve success when selling their projects at film festivals. Participants develop their skills in packaging, pitching, negotiating and closing deals through workshops and tailored mentoring support. The programme culminates in a trip to an international film festival, where they put their skills

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to the test. Market Trader brings together producers, distributors and sales agents at an early stage of their career and helps them build strong networks for the future. The programme is delivered through a combination of intensive workshops, mentoring, market attendance and networking with a specific focus on EFM/Berlinale 2020. The programme will consider and contrast differing needs and perspectives from all parts of the film value chain – makers, buyers, sellers – and hone skills in pitching, negotiating and closing deals.

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START-UP SUPPORT PROGRAMMES

Types of programmes: 1. Kick-off and counselling, 2. Incubation, 3. Funding, 4. Expansion and internationalisation

These types of programmes have similar characteristics as the programmes within the Grow Talent and Business and Financial Aid pillars. However, the difference lies in the stage of the business which is applying for the programme. In this section, the programmes are aimed at start-ups. The definition of a start-ups differs in all partner countries. For the Czech Republic, the agency CzechInvest considers, for the purposes of its programmes, a start-up to be a company with a legal form that is up to three or, in some programmes, seven years old and has an innovative product.

Start-up Support Programmes		
Types of Support Programmes	**Programmes**	**Sectors**
Kick-off and counselling	CzechStarter	Multisectoral
	JIC ENTER	Multisectoral
	SETsquated partnership	Technology
Incubation	B2B Incubation Programme	Multisectoral
	Czech Accelerator	Multisectoral
	Navigation for innovators	Multisectoral
	Faschtech Accelerate	Fashion
Funding	Plan for the promotion of innovation and advanced investment	Multisectoral
	JIC VENTURES	Multisectoral
	Comprehensive programme of innovation, internationalisation and investment support	Multisectoral
	Bizkaia Creativa	Videogames, audio-visual, fashion, design
	Establishment of new innovative companies	Multisectoral
	CRAFTS	Craft
	Innobideak (Kudeabide, Pertsonak, Leiabide)	Multisectoral
Expansion	CzechMatch	Multisectoral
	CzechDemo	Multisectoral

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1. KICK-OFF AND COUNSELLING

DESCRIPTION

Within these programmes, start-ups get assistance with development of their business activities. They are provided with mentoring from experienced entrepreneurs, services from renowned consulting firms, promotion, counselling, free office space and an opportunity to build their own network. Programmes may include service offers ranging from assistance with financial plan development, relevant market segmentation, contract preparation, creation of a list of potential customers, search for partners, strategy development, etc. Some programmes help start-ups to develop their products in the prototype phase or in the proven-idea stage, or to transform a mere idea into reality.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Large choice of experienced entrepreneurial mentors	Huge administrative burden (monitoring reports, development plan)
The majority of costs for advisory services are covered, e.g. protection of intellectual property, setting up contractual arrangements, collection of evidence for market research, setting up procedures for the given company's operation.	Slow internal processes while implementing and administrating projects
It is good when all start-ups of all stages of development can apply.	Sometimes there are not recognised eligible costs related to specific services (e.g. website development, graphic design, preparation and printing of marketing materials, patent registration), which can be a burden on start-ups.
Individual approach	
Building of a group of individuals/businesses working in similar areas – they can collaborate and learn from each other (positive spill-overs).	

BEST PRACTICE ADVICE

There are many start-up programmes that foster the development of start-ups. However, they are usually not focused specifically on cultural and creative industries. Therefore, it is important to create a network of experienced professionals from the cultural and creative industries to foster further interconnections.

PROGRAMME CASE STUDY

CZECHSTARTER

- Institution: CzechInvest
- Sector: Multisector
- http://www.podporastartupu.cz/projekty/czechstarter-2-2/

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CzechStarter is a programme aimed at start-ups which offers business skills development over the course of a seven-month period. Mentoring and consultancy activities are provided with focus on experience and best practice transfer, knowledge transfer related to management, marketing, finance, leadership, investment etc. Start-ups get the chance to be interconnected with mentors and potential partners, as well as an opportunity to pitch to investors. The best start-up takes part in a two-week bootcamp in Silicon Valley, where it can explore the well-developed local business ecosystem and attend mentoring activities and networking events.

2. INCUBATION

DESCRIPTION

An incubator is an environment with the main purpose of helping newly established companies at the beginning of their business operation to come up with innovative ideas. The target group of incubator programmes comprises start-ups with interesting and innovative business ideas and motivation. Incubators provide different services ranging from seminars focusing on business- or marketing-plan development, learning from high-level professionals, usage of office space, consultations, advisory services, interconnection with other start-ups and business network and a list of investors' contacts. Moreover, incubators create a space for developing a community whose members usually face similar challenges or problems, which gives the start-ups a good opportunity to come up with an appropriate solution. The duration of such programmes is usually one year.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Personalised business development plan	Huge administrative burden (monitoring reports, development plan)
A strong network of investors and partners can be built.	The programme is available only in the capital city. The result is that, for example, the fashion industry may be heavily centred in the capital with very few businesses in the regions.
It is beneficial when the incubator is also part of a university.	

BEST PRACTICE ADVICE

Business diagnostic checks performed at the launch of incubation and then every the months over the course of its duration are a good way to measure how well the programme is working. Moreover, they give the necessary knowledge to adjust the provided incubation support according to the needs of a particular business.

PROGRAMME CASE STUDY

FASHTECH ACCELERATE

- Institution: Centre for Fashion Enterprise
- Sector: Fashion SMEs
- https://fashion-enterprise.com/programmes/fashtech-accelerate

Co-funded by the Horizon 2020 programme of the European Union

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The incubator is located within the London College of Fashion, University of the Arts, London. It supports early-stage businesses and creative talents who are fusing fashion and tech. Beneficiaries are offered free desk space in the CFE's community offices as well as tailored business support for up to 6-12 months and workshops on business planning, accessing finance, branding, e-commerce, costing, innovation, product diversification, etc. A diagnostic review of the business takes place at the start of the programme and every three months after to assess progress and tailor the programme to best suit the business. This accelerator is only open to London-based businesses.

3. FUNDING

DESCRIPTION

The programme funding aimed at start-ups can be in the forms of grants, funds, loans, incentives, etc. The ambition of a fund is to find an untapped talent and to fund new creative business ideas in order to support business growth. This can be in the form of minor seed funding for start-ups and SMEs, since it is very difficult for new and small creative companies to obtain money for their start. Furthermore, financial support can be provided to companies that are already participating in certain programmes, e.g. incubation programmes. In this case, investors are already familiar with the given company and with its business plan and products. Therefore, investors can invest in the prototype with very high potential and help SMEs enter the market.

Financial support can be aimed either at establishment of a new innovative company or at improvement of a company's competitiveness. The support of a fund can cover feasibility studies, market research, technical reports, concept development, project development, intellectual property protection, certifications, attendance of fairs, internationalisation, etc.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+
When small amounts of money are provided to the companies, funding is flexible and available.
Non-repayable grant (both external and internal costs are considered eligible)
Depending on the rating obtained during the evaluation process, 100% of eligible costs could be covered by the aid.
Free access to the services offered by the funding provider.
Small investments are included in the eligible costs.

-
Administrative burden for relatively small amounts of funding for both applicants and administrators
When the programme is applicable for companies with more employees, it can be problematic, since the CCIs consist mostly of freelancers or companies with few employees.

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BEST PRACTICE ADVICE

- It is often difficult for small businesses, especially those in the cultural and creative industries, to secure money for their development unless they rely on their founders' family or friends. Therefore, provision of a modest amount of seed funding can be changemaking.

PROGRAMME CASE STUDY

1. CRAFTS

- Institution: Bizkaia County Council, Beaz S.A.U
- Sector: Craft

This programme promotes aid for revitalising and relaunching the crafts sector in Bizkaia, encouraging the establishment of new companies, improving the training of artisans and spreading knowledge of craftsmanship.

- Beneficiary of the grant:

Aid is aimed at craft companies registered in the specific Register of Crafts Companies of Bizkaia and other associations and craftsmen with their registered office and domicile for taxation purposes located in Bizkaia.

- Eligible Costs:

Crafts Companies	Associations and Craftsmen
Establishment, expansion or renovation of craft workshops	Training
Grant of 50% of investments in equipment, tooling and computer equipment	Organisation of fairs and exhibitions
Training	Dissemination and promotion of the crafts sector of Bizkaia
Commercial promotional materials	Costs linked to improvement of the management and competitiveness of the sector
Attendance of fairs and exhibitions outside the territory of Bizkaia or those that take place at the Bilbao Exhibition Centre	
Recruitment of external professionals	
Rental costs of craft workshops	

2. BIZKAIA CREATIVA

- Institution: Bizkaia County Council, Beaz S.A.U.
- Sector: Videogames, audio-visual, fashion, design

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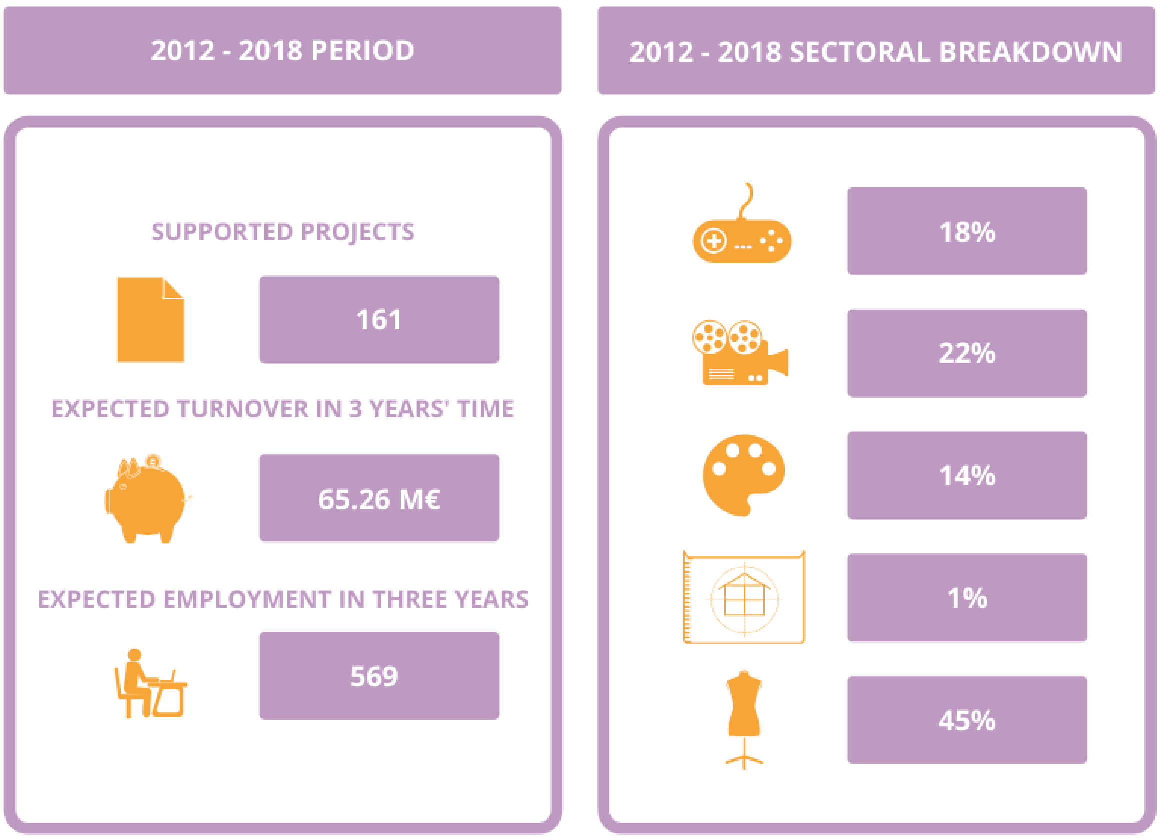

Bizkaia Creativa is a grant offered by the Biscay County Council and managed by Beaz S.A.U. It is focused on strengthening cultural and creative industries through the development of new creative projects that have an impact in terms of turnover and employment.

The purpose of the programme is:

- Establishment of new creative companies
- Creative projects that foster diversification in products, services, markets.
- Opening of new international markets
- Company acceleration projects
- Development of projects aimed at the global strengthening of the sector

The expenses covered are related to:

- Project development
- Company establishment
- A percentage of the payroll of the staff involved in the project
- Project acceleration

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4. EXPANSION AND INTERNATIONALISATION

DESCRIPTION

These types of programmes are aimed at helping businesses that are ready to scale up. They usually provide intensive support over a certain time period to help companies with high growth potential reach new markets and scale their activities. They help start-ups with expansion to international markets and with increasing their chance of finding business partners or investors. Start-ups may introduce their business activities at major international events and present themselves at well-known fairs, conferences or festivals that can provide them with a higher global profile.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Large selection of experienced entrepreneurial mentors	Administrative burden
Quick penetration of foreign markets and access to resources enabling acceleration of businesses	

BEST PRACTICE ADVICE

The programmes should ensure that the participating companies are well prepared for exhibitions (i.e. they should help improve their presentation skills, set their expansion goals, etc.).

PROGRAMME CASE STUDY

CZECHMATCH

- Institution: CzechInvest
- http://www.podporastartupu.cz/projekty/czechmatch-2/

CzechMatch is a week-long acceleration programme held abroad, packed with mentoring and networking, and culminating with a matchmaking event. During the week, the start-ups have the opportunity to present their projects, attract the attention of the investors in attendance and gain new contacts. CzechMatch gives start-ups the chance to visit attractive destinations such as Silicon Valley, London, Singapore and New York.

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FINANCIAL AID

Types of programmes: 1. Grants, 2. Incentives, 3. Creative vouchers, 4. Crowdfunding, 5. Loans

Financial Aid		
Types of Support Programmes	**Programmes**	**Sectors**
Grants	TACR ETA	Multisectoral
	Creative Europe	Multisectoral
	Seed Capital	Multisectoral
	Basque Fondo	Multisectoral
	Regional grants from the European Union Structural Investment Fund	Multisectoral
	New Ideas Fund	Screen based
Incentives	Film Incentives	Film
	Tax Certificates for Deductions	Multisectoral
	Tax incentives for the creative industries	Multisectoral
Creative Vouchers	Creative Vouchers (JIC)	Design
	Creative vouchers of the Central Bohemian Region	Design
	Prague Voucher – Creative Service	Design
	Design for Competitiveness	Design
Crowdfunding	Crowdfunder	Multisectoral
	Hithit	Multisectoral
Loans	Creative England Business Investment Programme	Multisectoral
	Ekintzaile (Luzaro-SPRI-Basque Government)	Multisectoral
	Innovation Fund	Multisectoral
	Enterprise Finance Guarantee BBB	Multisectoral

1. GRANTS

DESCRIPTION

These programmes involve financial contributions to SMEs in order to support and strengthen their business activities. There are usually specific criteria applied that must be met. Within cultural and creative industries, the purpose of providing funding and grants is especially development of competitiveness, enhancement of business skills, support for local culture and creative industries and promotion thereof, and research and development activities.

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STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Some grants are aimed at fostering cooperation between universities and creative companies, resulting in the establishment of new relationships among companies and researchers throughout the country.	Without a lot of publicity and marketing, it can be hard for companies to find out about grant opportunities.
Regional grants boost the growth of start-ups in regions that are typically underserved by private investors and accelerator programmes.	The focus of grant funding is sometimes too broad and not specific for the creative sector.
	Funding programmes are not structured for cultural and creative industries and they are often inflexible, which leads to unsuitable delivery targets and project demands.
	Companies can become dependent on (European) grants rather than developing a sustainable business financing model.

BEST PRACTICE ADVICE

- For small businesses in the CCIs, it might be very difficult (or even impossible) to obtain grants, especially if there is a criterion specifying a minimum number of employees (some companies have only one or very few employees). Therefore, this requirement should be removed. Moreover, CCI companies are not often familiar with the funding possibilities and the application processes are often difficult and time consuming. Therefore, new grants should be created that reflect the needs of the CCIs and adjust the requirements of the application process. Moreover, the grants that are based on NACE code classification of companies should include all of the NACE codes of the CCIs.

PROGRAMME CASE STUDY

CREATIVE EUROPE

- Institution: EU
- Financial allocation: €1.462 billion
- Sector and type of business: Audio-visual, cinematography, cultural and creative projects
- https://eacea.ec.europa.eu/creative-europe_en

Creative Europe is the European Commission's framework programme supporting the cultural and audio-visual sectors.

The MEDIA sub-programme supports European cinema and the audio-visual industry. The CULTURE sub-programme supports international projects in the field of cultural and creative industries.

The intersectoral part includes the Guarantee Fund, which is intended for providing loans for profitable projects in the cultural and creative sectors. The interdisciplinary section also offers the means to

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develop studies and promotes better data collection in order to improve the arguments for strategic measures and means to support pilot cooperation projects between the audio-visual and other cultural and creative sectors.

The total budget for Creative Europe for 2014-2020 is €1.462 billion. The MEDIA sub-programme accounts for 56% (€818,720,000), the Culture sub-programme 31% (€453,220,000) and the inter-sectoral section 13% (€ 190,060,000).

2. INCENTIVES

DESCRIPTION

Incentives generally comprise benefits provided to companies with the aim of motivating them to behave in a certain way. They serve as a means of support to raise the level of investments in a particular sector. Incentives can be provided either in the form of direct financial support or in the form of a tax advantage such as income-tax relief. Supported areas may include development and innovation of products, technologies and production processes, purchase of certain services or products, or involvement of local producers as creative element suppliers.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
It is easier to get support for traditional sectors in the country (e.g. film).	It is easier for large companies and productions to have access to tax credits. Although statistics show that the programme helped the related sectors to grow, it helps large international productions more than small businesses.
A broad network of people can access incentives.	In order to access incentives, projects often have to be submitted online, without affording their originators an opportunity to personally explain and defend them.
Incentives provide motivation for inward investment into the country from major film and TV production companies.	

BEST PRACTICE ADVICE

- It is important to offer incentives in regions to attract investors to remote locations. Incentives are an efficient tool for supporting the production of a certain industry. It is important to adjust the criteria to the specifications of each industry, as the needs within the creative and cultural industries may differ.

PROGRAMME CASE STUDY

FILM INCENTIVES

- Institution: The Czech Film Fund
- Sector: Film
- https://fondkinematografie.cz/filmove-pobidky/

Co-funded by the Horizon 2020 programme of the European Union

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 823677.

The Czech film incentives scheme is administrated by the Czech Film Fund and offers filmmakers cash rebates on qualifying Czech and international expenditures. The incentives support feature, animated and documentary films, fictional TV content and animated series. Firstly, the incentives are in the form of a 20% cash rebate on eligible costs in the Czech Republic; secondly, a 66% cash rebate on withholding tax paid in the Czech Republic.

3. CREATIVE VOUCHERS

DESCRIPTION

The mission of the programmes is to support collaboration of SMEs with professional creatives through financial support. Companies are provided with creative vouchers which partly or fully cover the costs of services provided by creative professionals. There may even exist a database with all of the creative professionals within the given region/country. The purpose of linking a company with creative sectors is to support innovation and growth by gaining a competitive advantage, setting up a better marketing strategy, creating a PR communication portfolio, and increasing the quality of the corporate entity's products and services. Creative vouchers are designed for using specialised services in the case that it is not efficient for SMEs to provide the services by means of their own capacities.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
The only support option in the region	Lack of industrial designers in the region
Supporting tool for creative professionals	Financing is not continuous
Good opportunity for companies to improve their products and to expand in the region	Insufficient financial allocation
Suitable for companies with no business history (early stage)	Small number of CCI companies
No need for tenders	Product design only
	Limited database of designers

BEST PRACTICE ADVICE

- The problem with this programme is that access to the database of designers is usually provided only to local companies and creative vouchers are not applicable at the national level. Therefore, it would be efficient to interconnect the databases across the regions, thus creating a national database.

PROGRAMME CASE STUDY

CREATIVE VOUCHERS

- Institution: South Moravian Innovation Centre (JIC)
- Financial allocation: CZK 4.5 million (2019)

Co-funded by the Horizon 2020 programme of the European Union

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Creative vouchers are a form of one-off financial support for companies in the South Moravian Region that create products or services in the main sectors of the Regional Innovation Strategy or are part of the value chain of such a company. This support can be used on cooperation with experienced professionals from the creative database. A voucher covers 75% of the contract price, up to CZK 100,000. Companies pay the entire order and JIC then reimburses them by means of creative vouchers. The minimum total value of the contract is CZK 50,000 excluding VAT. Training seminars are also included.

4. CROWDFUNDING

DESCRIPTION

Crowdfunding is a process by which the public provides financial contributions used for project implementation, establishment of a new company or other business activities. Every individual contributes a relatively small amount of money. Within these types of programmes, companies may obtain financial capital without giving up a share of ownership and can instead present their ideas to internet-users, since the whole crowdfunding process is usually carried out on the internet. The form of crowdfunding is either quid pro quo, meaning that individuals receive a reward, usually the service or product that is being financed, or based on donations.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+
Large number of projects
Suitable for small companies
Risk free
Great market research
Fast access to money
Donations from the public sector

BEST PRACTICE ADVICE

As an open-access way to get funding for businesses, this programme helps to overcome the inequality of opportunities in the creative industries, where individuals with money and networks can start businesses more easily.

The motivation of people contributing to projects is based on their values, beliefs or interests and they are willing to finance projects without demanding a financial profit.

It is important to make a great effort to inform people about your project. The impact and the funds received are linked (in some way) to the advertising campaign.

PROGRAMME CASE STUDY

HITHIT

- Institution: Hithit
- https://www.hithit.com/en/home

Hithit is a platform that enables interconnection of creative people with those who want to support them. Creative workers, artists, designers and developers create their projects and present them on

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the platform to the community trying to motivate them to participate and to collect the required amount of funding. Projects that receive funding include film productions, software and mobile app development, manufacturing of innovative or designer products, creative projects, etc.

4. LOANS

DESCRIPTION

Loans for SMEs can comprise an essential tool for creation of a favourable environment and the right circumstances to enable creative people to realise their ideas. This type of aid for creative SMEs come in the form of no-interest loans and equity stakes to support start-up companies.

Another possible form of financial aid related to loans is a loan guarantee, which allows viable small businesses that do not have sufficient physical collateral to access conventional loans, e.g. from mainstream banks, as the national organisation guarantees a percentage of the loan. This encourages lenders to provide loans to businesses that are usually based on intellectual property.

STRENGTHS AND WEAKNESSES OF THE PROGRAMME

+	-
Creative industry loans sometimes offer flexible conditions, which is good for creative businesses whose finances are often unpredictable.	This type of client lead loan programme is often costly to carry out and requires a lot of staff time deeply assessing loans and maintaining good relationships with clients
Business loans fill the financing gap for businesses trying to access financing, as there are often not enough loan programmes for creative businesses and mainstream financing does not work for them.	Specialist 'wrap around' support is also often costly to carry out
If loans provide wraparound business support as well as money, business skills are developed, and businesses are made more sustainable.	

BEST PRACTICE ADVICE

Flexible, client-led loan financing as provided in an investment programme is crucial for creative businesses, as they often do not have the same business model as in other industries. Creative businesses at early stages of their development need flexible financial products, as well as business support and mentoring to ensure they have the right business skills to grow and the ability to access financing further down the line.

Loans guarantee in Great Britain is a government funded scheme that works well, as it encourages mainstream lenders to invest in SMEs. It is particularly useful for creative SMEs with a lot of intellectual property (IP), which are more likely not to have the physical assets to secure loans and so are often rejected by lenders. Schemes like this which encourage mainstream investors to engage with creative businesses are vital to showing mainstream lenders the potential and the commercial success of the

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creative sector. The best practice is to use more public financing to back mainstream private-sector loans and to try and change the risk perception of IP-based and small innovative businesses.

Another type of bank guarantee is the Cultural and Creative Sectors Guarantee Facility under the Creative Europe programme. It enables the access to finance for SMEs in CCIs. For more information, see the following link: https://ec.europa.eu/digital-single-market/en/financial-guarantee-facility-culture-creative.

PROGRAMME CASE STUDY

CREATIVE ENGLAND BUSINESS INVESTMENT PROGRAMME

- Institution: Creative England
- Sector and type of business: Creative and digital screen-based businesses

Creative England's financial aid for businesses offers loans up to £250,000 to SMEs outside of London. This aid comes in the form of low- and no-interest loans and equity stakes. Businesses have to meet eligibility criteria to apply and then undergo evaluation by an investment committee before receiving a loan. The loans comprise public-sector money originally received through RGF funding from the government. Once loans are paid back, they are reinvested. Creative England is one of the only financing providers – either public or private – that focuses solely on the creative industries. The programme addresses the recognised market failures involving access to financing, which means that creative businesses, especially those outside of London, struggle to secure the investment they need to grow.

A performance analysis by independent economic analysts, The Good Economy, has shown that this method of providing specialised financing and business support is very effective. Between 2012 and 2017, Creative England invested a total of nearly £20 million in 350 businesses, i.e. £67,000 per business on average. Four pounds of private capital was mobilised for every one pound of public funding that Creative England invested and 1,145 jobs were created, 45% of which in places in the UK with the highest unemployment.

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Conclusion and Recommendations

CZECH REPUBLIC

The potential of CCIs in the Czech Republic is big. We have rich historical and cultural background, cultural traditions, high engagement rate in cultural activities, wide infrastructure in terms of traditional culture. Moreover, sub-sector such as film industry has big background in the Czech Republic and for example videogames industry is successful abroad and design is on the rise. CCIs are cross-sectional and nowadays, they are often part of advanced technologies or education. Marketing and advertising are businesses which take advantage of the social and technological changes. However, there is still a long for understanding the importance of CCIs in the Czech Republic. There is a pit between politics and private sector. The intercommunication does not work properly.

There have been some of the problems and needs demonstrated in the capitol Situational framework -The Czech Republic. The needs range from the awareness and understanding of the CCIs, networking activities, educational and informational drawbacks, lack of institutional background, mapping activities, infrastructural possibilities etc.

With the ***5 steps towards cultural and creative industries,*** the actual state of the CCIs in the Czech Republic, its drawbacks and recommendation will be demonstrated.

1. RAISE AWARENESS ABOUT CCI

Despite the inaccuracy of the definition of CCIs, the term is used among either professionals who are either working in the sub-sectors of the CCIs or people working in universities and institutions that deal with cultural and creative activities on daily basis. However, the term “CCIs” is otherwise not known throughout different groups in Czech society.

Even some professionals working in the sub-sectors do not consider themselves part of the CCIs and the reason for that may be that there is still a gulf between the sectors and industries related to the further classification of the CCIs according to for-profit or non-profit organisations. The CCIs generally include both for-profit and non-profit organisations (therefore, in some definitions, including the EU’s definition, CCIs are called Cultural and Creative SECTORS). However, these two main groups can differ significantly and have different needs and demands. Therefore, it is difficult for, for example, the advertising sub-sector (for-profit organisations) to become connected with the sub-sector related to scenic art (mostly non-profit organisations).

The political establishment is also unfamiliar with the importance of the CCIs. Even though there data are being collected, mostly by the organisations IDU, NIPOS and CSU, the data are often inaccurate and are not further used for the promotion of the CCIs or for lobbying.

Moreover, despite the fact that within this project the main focus is on the industries (for-profit CCI organisations in general), the CCIs (CCSs) overall consist also of non-profit organisations whose value for society and the economy is greatly underestimated.

The Ministry of Culture and its contributory institutions, regional municipalities and other stakeholders and institutions related to culture itself or cultural industries are attempting to raise awareness among society as a whole. However, some of the cultural industries (such as the video-game industry) and especially the creative industries (e. g. architecture, advertising and design) do not have strategic support anywhere and awareness of their contribution is very low.

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2. STATE SUPPORT

In the Czech Republic, the main organisation responsible for the CCIs is the Ministry of Culture and its contributory organisations. However, the primary focus is on sustainment of the culture itself, particularly cultural heritage, the contributory organisations and, mainly, the non-profit sector.

In terms of cultural industries, the film industry receives most of the support. The reason for this high rate of support lies in the ability of the whole film industry to cooperate and work on legislative amendments. Of primary significance is the establishment of the Czech Film Fund, an umbrella institution that promotes the stability and interests of the film industry. In terms of other sub-sectors such as the video-game and music industry and creative industries such as architecture, design and advertising, there is a lack of strategic support. There is a fragmentary approach toward the responsibilities and support strategies relating to CCIs.

It is important to define who is responsible for each sub-sector and to pursue an effective policy in this area. It is important to set strategic goals. Moreover, despite the importance of the strategies that set the main direction, it is worth considering the establishment of a permanent team, department or institution that would ensure the fulfilment of the strategic goals and the instituted policy. The Czech Republic should take inspiration from the United Kingdom, where the responsibilities are clearly divided and there are institutions that are responsible for the development of the CCIs.

In terms of state institutions, there are a lot of contributory institutions that deal at least partly with CCIs, such as CzechInvest, CzechTrade, CzechTourism and Czech Centres. However, there is no cooperation on their activities, which leads to further fragmentation. These organisations should create a platform or working group to cooperate and set common goals in order to avoid duplicity.

3. MAPPING OF CCIs

As described in the history of mapping in the Czech Republic and demonstrated in the mapping timeline, mapping activities have been carried out since 2011. IDU, the contributory organisation of the Ministry of Culture, has carried out several thorough mapping activities since then and its methodology has been used by some, but not all, institutions when mapping the CCIs in cities.

Moreover, the annual mapping conducted by NIPOS and CSU is not sufficient and the mapping activities focused on the CCIs in the Czech Republic are still undervalued. There should be updating of the annual data collection, mapping should be carried out on a regular basis and there should be one organisation responsible for the mapping activities. Afterwards, the collected data should be properly used.

RECOMMENDATIONS
Unify the definition and classification
Unify the mapping methodology
One responsible (central) institution for annual mapping and for regional mapping
Mappings on a regular basis
Change of NACE codes – taking creative intensity into consideration
Use, dissemination and sharing of the mapping results

Another problem lies in the inefficiency of the sharing and dissemination of the collected data and the mapping activities. Currently, there are several projects that are in some way related to CCIs. However, the information is not shared and thus overlaps, and duplication occur together with wasting of time, resources and human capacity. Therefore, the fourth step involving the creation of a communication

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platform or “umbrella institution” is suggested in order to boost synergy and cooperation and share best practices from cities, institutions and companies.

4. CREATION OF COMMUNICATION PLATFORM FOR CCIs

Information transfer is important for the proper setting of conditions for the further growth and development of the CCIs. There are already functioning websites – Creative Czechia and Culturenet. However, these internet platforms serve mostly for publishing news among professionals and institutions in the area of culture. With respect to the sub-sectors, some of them have their own institutions that are responsible for lobbying and further growth. However, there is not an institution or platform that would gather all of the sub-sectors together and ensure communication between the public, the private sector and the public administration.

Some networking activities are being conducted in the regions, where representatives of each sub-sector gather together with public officials and have discussions about the needs of the CCIs. These activities are very important for the development of the CCIs and fulfil the first step related to *Raising awareness of the CCIs.* However, these activities are conducted on a random basis and there is usually no follow-up activity. The outcomes are usually not shared with other regions and, therefore, there is a possibility of duplication of the activities. Therefore, there is a need for a single umbrella institution that would ensure the transfer information and knowledge among all of the sectors and sub-sectors, provide consultancy and carry out lobbying activities.

5. SUPPORT SYSTEM DEVELOPMENT

The final step is the creation of a support system, which should include, for example, creative education; incubation of companies, whereby they can receive knowledge related to business skills or specific experience related to the particular sub-sector itself; expansion and promotion of support and financial support. In the Czech Republic, there is not a comprehensive system of support for CCIs. There is a new project managed by the Ministry of Culture called *Development and Support of the CCI Strategy*[10]*,* which will come up with suggestions for the development of the CCIs and an action plan with specific steps.

There are already some programmes aimed at financially supporting CCI companies (such as creative vouchers) and incubation programmes are arising. However, to ensure the availability of other existing programmes in which CCI companies can also participate and apply, it is important to redefine the conditions of those existing programmes and to include all of the NACE codes of the CCIs. Most importantly, the CCIs consist mostly of self-employed people and freelancers. Therefore, it is important to open up the programmes not just to legal entities, but also to natural persons.

The following are tips for the Czech Republic based on an analysis of support programmes:

<u>Grow Talent and Business:</u>

The video-game industry is emerging in the Czech Republic. It combines culture, creativity and technologies. Many Czech companies have succeeded with their products abroad. This sub-sector could be further supported by a similar programme offered by Creative England called IFEATURES FILM

[10] The realization of the project started in May 2018 and it is planned for 27 months. Available outputs: http://projektovakancelar.mkcr.cz/kkp/

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PRODUCTION LAB. The iFeatures programme combines funded project development with intensive high-level training, mentoring and dedicated support with established industry professionals to guide original new films to market. This mentoring programme could be modified according to the needs of the video-game industry and help foster further growth.

Networking Events:

One of the recommendations based on the analysis of the programmes is the EVOLVE INVESTOR NETWORKING EVENT programme provided by the United Kingdom and the institution Creative England. The event brings together speakers from the professional sphere as well as investors and the public. It promotes the CCIs as an investment opportunity and promotes their success. Since the CCIs consist mostly of self-employed people and small companies, they do not have the capacity to promote themselves. This can be an opportunity to raise awareness of the CCIs and foster their growth. One such project called **Arts for Business & Business for Arts** was organised in the city of Pardubice. The project aimed to interconnect entities in the cultural sector with the private sector by means of speed dating. The purpose was to offer a space for fostering cooperation and development of the creative environment.

See the following link: https://www.pardubice.eu/urad/radnice/pro-media/tiskove-zpravy/novy-projekt-cili-na-sblizeni-kultury-a-soukromeho-sektoru/

Promotion of the CCIs:

Further inspiration lies in the CREATECH CONFERENCE programme. It brings all of the the sub-sectors together and promotes their penetration of technology. Since the Czech Republic is a technology-oriented country, this can be a good way to promote the CCIs.

Start-ups:

Further inspiration is provided by the CRAFT programme in the Basque Country. This programme promotes aid for revitalising and relaunching the crafts sector in Bizkaia, thus encouraging the establishment of new companies, improvement of artisans' training and dissemination of knowledge of craftsmanship. Since craftsmanship has a long and strong tradition in the Czech Republic and products in this sub-sector have high value added, introduction of such a programme and support for local crafts would comprise a strategic step.

Financial Aid:

The CREATIVE ENGLAND BUSINESS INVESTMENT PROGRAMME in the United Kingdom offers loans solely to companies in the creative industries outside of London, as those companies otherwise have little chance of receiving loans. In the Czech Republic, a similar programme with interest-free credit is offered by the Czech-Moravian Guarantee and Development Bank. Reference: https://www.cmzrb.cz/podnikatele/uvery/infin/?rc

However, there are only a few companies operating in the CCIs that can submit a loan application. Loans should be made available to all of the companies with NACE codes operating in the CCIs.

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BASQUE COUNTRY

1. RAISE AWARENESS OF THE CCIs

In Biscay, industrial design has been taken into consideration and promoted for the past 35 years due to its relevance, significance, value added and contribution to the improvement of new products, processes and services.

Moreover, bearing in mind that the economy is growing with focus on digitalisation and enhancement and promotion of the creation of jobs in which new skills and abilities are required together with value added by people, creativity and creative thinking taking on greater relevance in the territory.

Therefore, public and private institutions are taking this into consideration and striving to promote the sector through aids, programmes, services, events and activities.

2. STATE SUPPORT

From the perspective of the territory and region, the value and contribution of the CCIs is very important, as they are highlighted as one of the opportunity fields and territory by the Smart Specialisation Strategy of the Basque Country RIS3. Moreover, its importance is undeniable in a transversal way, due to the generation of value and innovation in different sectors.

A regional and local multilevel model has been established with respect to the model of governance and promotion of the CCIs.

3. MAPPING OF THE CCIs

There is a uniform definition of CCIs in the Basque Country that is accepted by all institutions. The mapping activities are thus based on this definition and were first carried out thanks to the European Creadis3 project and were conducted by the Basque Government in cooperation with various public and private regional and local agents.

The key point of this aspect is to include a systematic procedure making it possible to increase the amount of available data and provide useful data and references for further analysis and conclusions in order to continue with the promotion of CCIs based on their real necessities.

4. CREATION OF A COMMUNICATION PLATFORM FOR CCIs

One of the main outputs of the thinking process and the study conducted after the mapping activities were carried out was linked to the creation of a Creative District administrated by the Basque Government.

The Basque Government has already elaborated a draft version of the content of this Creative District (ed. note: December 2019). The presentation of the initiative and the strategy will be the next step in the process in order to start its implementation. The idea is that this approach will be based on the so-called "one-stop shop model".

5. SUPPORT SYSTEM DEVELOPMENT

There are specific programmes and activities focused on the CCIs. Moreover, it must be stated that various creative-sector events are often used for promotion of the territory and to gain visibility in relation to the outside world.

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Looking ahead at the next steps, a redesign of programmes, aids and activities should be carried out, taking into account the real necessities of each sub-sector.

The aim is to design and create a tool that measures the indirect value added of the cultural and creative industries in other sectors.

The following are tips for the Basque Country based on an analysis of support programmes:

Different programmes should be focused on conducting different networking events where different investors are gathered. It is important to bear in mind that we have to raise awareness regarding specialised funds and people who really know and appreciate the real value added of the cultural and creative industries, not only in an economic way, but also in terms of the intangible value added of their solutions.

BEAZ Bizkaia would also like to comment on the UK's Screen Skills initiative. It would be interesting to promote a new programme similar to this one. We find very interesting the use of knowledge in different sectors in order to finally apply it in the cultural and creative industries and enhance within this field the careers of different professionals from other sectors.

The British CREATECH CONFERENCE programme could be inspiration for the Basque Country. It is undeniable that the real value of the cultural and creative industries needs to be related to the transversal contribution to industry, taking into account the potential of the industrial sector in Biscay and the Basque Country.

As the London College of Fashion is coming to Bilbao, future synergies will be studied.

Moreover, there are other proposals to be analysed, like a design study, in order to know what the main necessities, priorities and tendencies are and to finally attempt to implement a Design Hub.

A specific investment programme with experts on different sub-sectors in order to analyse the projects.

UNITED KINGDOM

The creative and cultural sectors are thriving in the United Kingdom. They are growing at four times the rate of the broader economy and their success is increasingly being recognised by politicians, both in the UK and on the global stage. The UK's film, music and fashion industries are world leading and there is a growing appetite for British creative products. The creative sector, as defined by the government, adds over £100 billion to the economy and generates more than 5.5% of the UK's total GVA. The broader creative economy, which comprises everyone working in creative roles in any sector in the UK, is responsible for one in every 11 jobs.

This commercial success of the creative and cultural industries was, to some extent, kickstarted by the UK government when it defined, mapped and evaluated the economic value of the sector for the first time in 1999. This provided a justification and evidence base for sustained public investment in the creative and cultural arts and positioned them for the first time as a commercially viable sector with potential for strong growth. However, the headline statistics mask some market failures within the sector and some of the barriers that it faces. The creative and cultural industries still receive significantly less government investment than traditional industrial sectors and training in creative skills is not a priority in the education system in the UK. There is also a great disparity between support for, and opportunities available to, creative practitioners in London and in the rest of the country. As

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one example, in 2016, 60.4% of creative businesses that received equity investment were based in London, yet the city only hosts 37% of the sector.

One step in the right direction was the Creative Industries Sector Deal, which published in 2017 as part of the government's new Industrial Strategy. This contained a number of commitments, agreed upon by industry and government, comprising an investment totalling £150 million and with a strong regional focus. While this was a welcome step in the right direction, investing in the future of the creative sector and job creation in that sector, other sectors such as the automotive and aerospace industries received significantly more investment in the sector deals they secured. To reach its true potential and be truly inclusive, the UK's creative sector needs more political support. More government investment is necessary, particularly to support innovation and R&D, as 95% of the creative sector is made up of small businesses that often do not have the resources needed for experimenting and innovating.

Another problem consists in equality of access opportunities and building creative careers. The UK's creative industries continue to face significant inclusion and diversity issues. Research conducted by McKinsey shows a strong relationship between workplace diversity and benefits to businesses and workers (such as improved performance, competitiveness, innovation, wellbeing and job satisfaction). In a recent study, it was found that companies in the top quartile for racial and ethnic diversity are 33% more likely to have financial returns above their respective national industry medians. Yet ONS statistics indicate that creative industries fall below the national average in the broader UK economy in terms of demographic composition – overall, the workforce is more male, whiter and better off, with fewer people with disabilities than the general population. Some creative sub-sectors are significantly more homogenous than others; for example, the IT, software and computer services sector is very heavily male dominated, and the music and performing and visual arts sector has a smaller than average employment percentage. The Creative Industries Council (CIC) recently launched a charter designed to address this issue and to spur greater diversity across the UK's creative industries.

The following three categories provide some more guidance on the state of the UK's creative sector and recommendations for its future priorities.

1. STATE-FUNDED INVESTMENT AND BUSINESS SUPPORT

As previously mentioned, state support for the creative sector in the UK is increasing, yet there is more that could be done to allow the sector to reach its full growth potential. While the sector deal was a positive first step, a more consistent mechanism of public investment in the creative sector is necessary for sustainable growth. There is currently a distinct lack of financing for early-stage businesses looking for financing to scale, which is particularly acute in the regions – Creative England's business investment programme is the only state-funded specialist creative-industries investment fund in the country. More funding for sector-specific and regionally focused business support and early-stage investment is needed in order for organisations with expertise, such as Creative England, to deliver a range of financial products targeted at the different levels of need. Providing early-stage financing on a commercial basis will support more diverse, sustainable business models and encourage further investment from the private sector, creating a more comprehensive investment offer for creative businesses.

Another issue faced by the creative business sector in the UK is low productivity. The UK's businesses are less productive than many of their European counterparts – the productivity gap between the UK and the six other G7 countries was 16% in 2016. [11] A recommendation on overcoming this productivity

[11] ONS, 2018

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challenge would be to address this issue by providing more public funding for specialised business support, such as leadership and management training, for all early-stage creative enterprises and freelancers, particularly for businesses based in the less productive regions of the UK (outside of London and the South East).

2. MAPPING OF THE CCIs: INSTITUTE REGULAR AND STANDARDISED REGIONAL MAPPING

The UK has a well-developed system of national mapping, and those working within the sector frequently use the data gathered by the Department for Digital, Culture, Media and Sport and by Nesta to demonstrate the value of the sector and build policy arguments and design interventions. As mentioned previously, an improvement to the mapping ecosystem would be to institute a system of regional mapping, so that regional clusters can be compared in a consistent way and local creative policymaking can be evidence based.

3. SUPPORTING SYSTEM DEVELOPMENT: FREELANCERS, EDUCATION AND SKILLS

Skills shortages and risks to the talent pipeline are some of the most urgent challenges facing the creative industries. The creative industries have long-standing skills shortages. These stem from inadequate training and are compounded by the ever-greater need for talent in a sector that is growing and constantly changing. There is a lack of awareness among young people and those who influence them about opportunities for work within the creative economy and how to pursue those opportunities, which has limited the talent and diversity of those entering the sector. Over the past decade, reforms to the school curriculum and funding cuts have led to fewer students taking creative and art qualification. This is also adding to the lack of class diversity in the creative sector – children from more affluent backgrounds are able to learn creative skills outside of the education system. It is important that the government redresses the mismatch between education policy and what the fast-growing creative and cultural industries need, and provide a proper career advice service that demonstrates the range of high-quality jobs that are accessible in the creative industries.

Furthermore, the freelance workforce faces constraints that reduce its productivity. Research shows that freelance workers make up 47% of the creative workforce, yet a lack of the benefits of fixed employment means they often face many barriers in their working life. For example, they can struggle to get a mortgage without proven income security, they have no safety net in terms of sick, maternity and holiday pay and they lack a collective voice to advocate for their rights as workers. One recommendation would be for the UK government to establish a future workforce commission. This would ensure that creative freelancers and future workers have every opportunity to thrive by establishing a Freelancer and Self-Employment Commissioner addressing issues such as late payment and providing broader social support.

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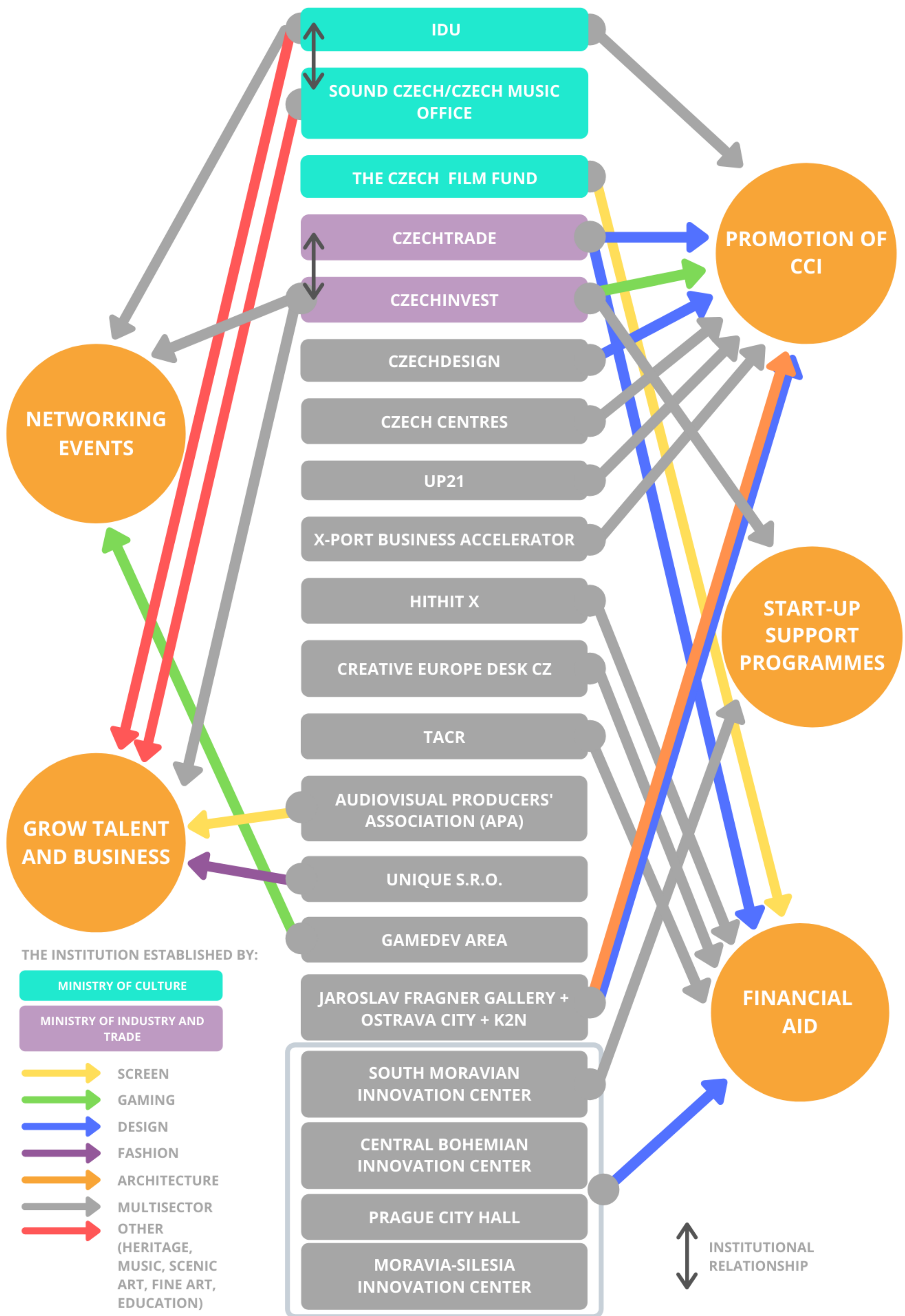
INSTITUTIONAL MAPS

CZECH REPUBLIC



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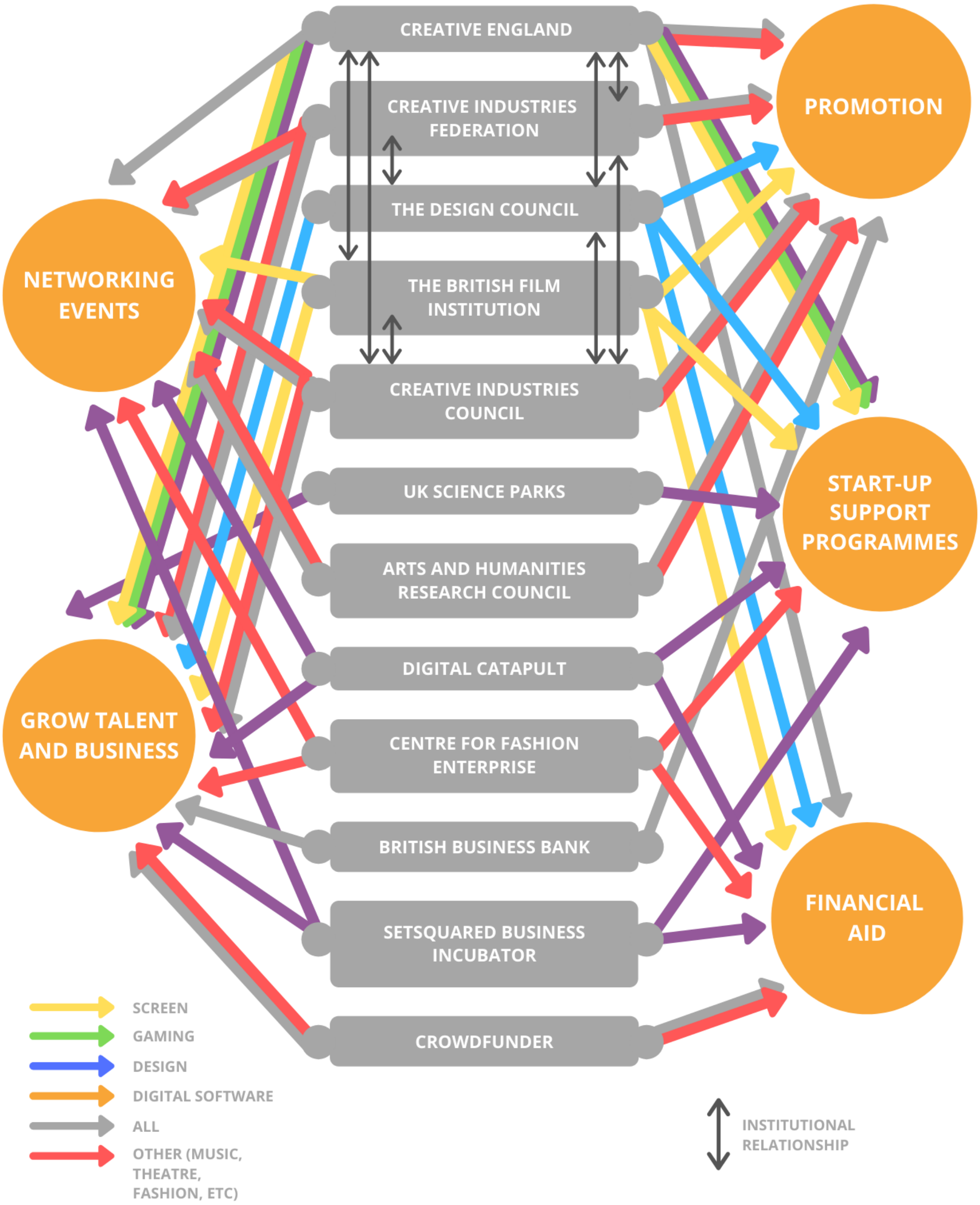
UNITED KINGDOM



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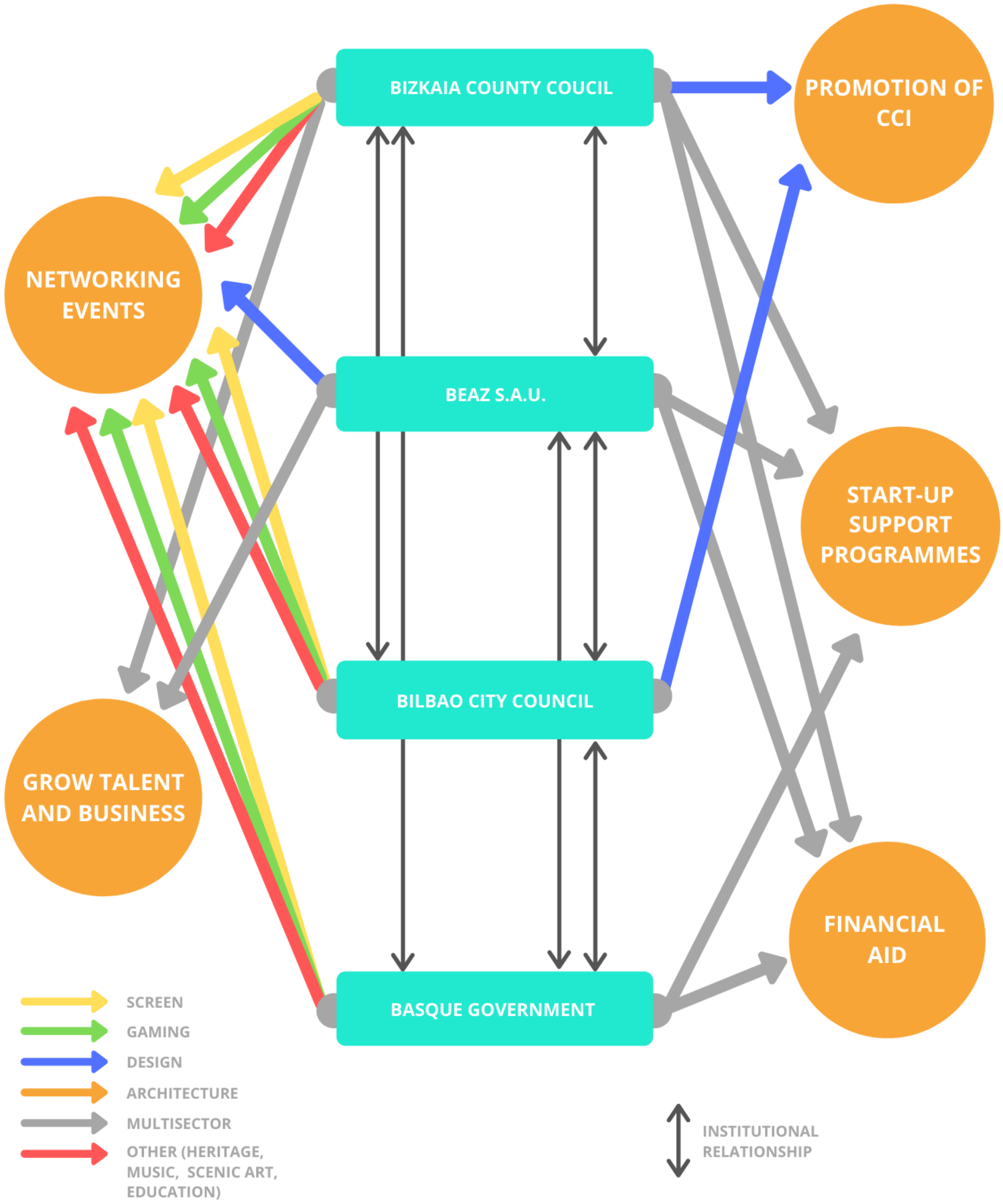
BASQUE COUNTRY



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BEST PRACTICES

CZECH REPUBLIC

BASIC DATA

Company name: RenderWaves s.r.o.
Address: Nam. Svobody 528, 739 61 Třinec, Lyžbice
Sector: Gaming industry, digital
Date of establishment: 2017
Legal form: Private Limited Company
Number of employees: 0 full-time employees, but eight people in different forms of employment

The story of RenderWaves began more than ten years ago at an elementary school in Třinec, where the members of the team first encountered programming. RenderWaves is a software company that owns a game engine – QUINE. The name RenderWaves was originally a domain purchased in 2015 by Ondřej Vaňka, who wanted to launch a web service that gathered news from the world of computer graphics and to promote his then small engine.

The technology that RenderWaves possesses is unique for many reasons, the three most important of which are the following:

- development of games on our engine is approximately 50% faster in comparison with the competition.
- created games then function also on older devices, which means a broader player base, resulting in more profit for game developers.
- our engine is the only one that is able to function in full mode on mobile telephones and tablets. We thus enable up to five billion people to develop their own games on their telephones (thus opening the way to, for example, Asian markets, where only a small number of people have computers, but many more have mobile devices).

It all began in Třinec around 2008, when Ondřej Vaňka, a secondary-school student, started developing a small engine. He later spent thousands of hours developing the program. It was truly a long march from the “Stone Age” to Silicon Valley. Along the way, there were many interesting projects such 3D Třinec and 3D Vítkovice. After leaving secondary school, Ondřej went to work for software companies in Brno. He returned to Třinec a few years later and started working with Jirka Heczko on what they are still doing today and to mentor interested people from workshops in the areas of computer graphics and programming. They also found other colleagues at the workshops.

BIGGEST SUCCESS

RenderWaves is still awaiting its greatest success, as its main product is still in the preparation phase, so there have been no successes yet in the form of large sales figures and conquering international markets. However, if we look at it from a different point of view, we can mention several successes:

With CzechInvest’s programme, we participated in a three-month acceleration programme in Silicon Valley. This participation brought us extensive valuable experience and we found there the newest member of our team, Darrell Rodriguez. Darrell has absolutely incredible experience in the gaming

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industry, having worked as a production director for Walt Disney, president of LucasArts (Indiana Jones, Star Wars, etc.) and COO of EA games (Battlefield, FIFA, SimCity).

Another tremendous success for us is working with students, as we are continuing to focus on education in the region. We teach students to program and to think in the abstract environment of the Quine game engine, and we believe we are doing a good job. Some of the students who pass through our workshop then go on to become our new employees or decide for a career in the IT (or, as the case may be, gaming) industry.

IN WHICH PROGRAMMES DID THE COMPANY PARTICIPATE?

RenderWaves has been involved in several national and local programmes. Despite that, however, the journey to Silicon Valley was demanding. On the other hand, without mentoring from GreenLight, MSIC, CzechInvest and US-MAC, we surely would not have gotten that far. GreenLight was the first point of entry into the world of start-ups and gave us basic information on everything that needs to be done in order to establish a functioning company. Thanks to GreenLight, we also learned that there are other organisations focused on supporting start-ups. At the GreenLight Startup show, where we won second place, we met Dan Zaleski, a representative of the Moravian-Silesian Innovation Centre (MSIC) in Ostrava. Our project appealed to him and he willingly came to us in Třinec and helped select the right programme that would push us forward. The MSIC began supporting us in our further development with respect to mentoring and helped with the preparations for Silicon Valley, since we knew that would be our destination. Irena Hluchníková also helped us a lot at the MSIC. She always advised us and led us through the entire PodReg (Entrepreneurial Region) programme. The day before the Start-up Show, we met with Alfred Coppola, Co-CEO of US-MAC, who liked our product, and we later initiated discussions with CzechInvest regarding the possibility of receiving support within the CzechAccelerator programme for a three-month residency in Silicon Valley. Many thanks to Karolína Krámková of CzechInvest. I have the feeling that this lady never sleeps :). We went through all possible processes – mentoring, formulation of multiple versions of business plans and presentations. There were a lot of mentors, so I suppose I won't mention them by name, but they also helped us a lot.

WHAT WERE THE PROS AND CONS OF THESE PROGRAMMES?

PROS:

- The greatest benefit of all of the programmes is the necessity of obtaining a full range of contacts across the community (start-up infrastructure). You can't get by as a start-up without contacts and when someone helps you with that, connects you to the right people, it's invaluable.
- Another benefit is definitely mentoring. We were tremendously lucky to have the mentors with whom we worked. They gave us a huge amount of information and Darrell eventually became a member of our team.

CONS:

- One of the biggest disadvantages is the usually small value of the vouchers (grants) that can be obtained within individual programmes. These amounts will support the purchase of some smaller equipment, but they won't support development itself, which is the most important thing in our case.

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- We see another disadvantage in the impossibility of adjusting the proposed budget with which you participate in the individual programmes. In the course of drawing support, many events may occur that a company, especially a start-up, cannot influence and it is thus very difficult or even impossible to adhere to a strictly set budget.
- The final disadvantage is the broad range of companies that can apply for support in connection with vouchers. It is not possible to modify (prepare) a programme for the needs of individual sectors, so it's impossible to fulfil the requirements of any of them.

WOULD YOU CHANGE ANYTHING ABOUT THESE PROGRAMMES?

If we could propose any changes, it would be good to adjust the strict rules for drawing budgets and the rigid rules of the individual programmes. Young companies develop very rapidly and undergo rapid changes. The rules do not take these aspects into account and cannot be adapted to them. Thus, for example, not all of the funding can be drawn or certain services are not used at all. A narrower specification of applicants (e.g. by sector) could also possibly help with respect to tailoring individual programmes to the needs of particular sectors. Otherwise, they are set up very well and truly help young companies.

WHAT ARE YOUR FUTURE PLANS?

We have huge plans for the future. The biggest goal is to defeat Unity Technologies, the company that developed the cross-platform UNITY game engine. Originally a start-up from Denmark, Unity is clearly our biggest competitor. We are already trying to look at their progress and development and learn from the mistakes they have made on their own journey and, conversely, to apply that which has made them successful. Another competitor we would like to surpass is the Unreal engine from Epic Games. Compared to the competition, we already have a great advantage in speed, as our engine is the fastest, as well as in the fact that our engine also runs fully on mobile devices, which opens up interesting markets and groups of potential users.

The last major goal that we have set for ourselves is to make our hometown of Třinec a smaller Silicon Valley in the Czech Republic. We are already managing to talk to potential partners about the possibilities of cooperation and about the concept. We believe we will succeed, even if it takes a lot of time and effort.

UNITED KINGDOM

BASIC DATA

Company name: Lockwood Publishing
Address: 9A Beck Street, Nottingham, Nottinghamshire, NG1 1EQ
Sector: Games
Date of establishment: 2009
Legal form: Private Limited Company
Number of employees: 86
Turnover: In 2018, turnover was £8,882,930 and profit £2,639,9684.

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BIGGEST SUCCESS

Founded in 2009, Nottingham-based Lockwood Publishing is an independent online gaming studio and the creator of the popular mobile app Avakin Life. The company originally generated the bulk of its income as a content provider to the Sony PlayStation Home Network. When this platform was closed in 2014, the Lockwood team used a loan from Creative England to develop their own content for mobile devices. They have since evolved to become one of the UK's top mobile games developers, successfully transitioning from a service business to one that creates and retains the value of its own IP.

The team has had a number of big successes. Their product is *Avakin Life,* a hugely popular 3D virtual and social world with 5.5 million monthly users and over 41 million downloads. The biggest success is winning multiple awards for this game, most recently the Game of the Year award and the Best Large Independent Studio award at the TIGA awards ceremony (Europe's biggest awards ceremony for independent games developer and publishers). Lockwood was also voted one of Deloitte's Technology Fast 50 winners and boasted a very impressive 777% growth rate in that same year.

In addition to this award success, Lockwood has been able to significantly scale up its business, opening three new offices, two in Leamington Spa and Newcastle in the UK and a European office in Lithuania.

IN WHICH PROGRAMMES DID THE COMPANY PARTICIPATE?

Lockwood received a loan from England's business investment and support programme. This meant it had a flexible, client-focused loan and access to advice and support for Creative England's expert investment team. The Lockwood team used a loan of £115,000 from Creative England to develop their own content for mobile devices. They have since evolved to become one of the UK's top mobile game developers, successfully transitioning from a service business to one that creates and retains the value of its own IP. At the time of the investment from Creative England, the company had annual turnover of £1,012,979 and net profit of £326,400. In 2018 the company reported annual turnover £8,882,930 and net profit of £2,639,964.

WHAT WERE THE PROS AND CONS OF THESE PROGRAMMES?

Pros:

- The investment programme is client led, which means Lockwood was able to have flexible loan conditions proposed by the company itself and had a good relationship with the Creative England investment team, so it could contact them and have its payment conditions altered if the company was struggling to repay the loan.
- As the loan was provided by Creative England, which comprises sector experts with extensive experience in helping businesses develop, Lockwood also received mentoring and advice, and could learn from the experience of other businesses that had participated in the programme.
- There were no specific restrictions on what the loan had to be used for, as there often is with European loans from regional development funds (e.g. for developing a new product, etc.) this meant that Lockwood was able to use the entire loan to hire three new employees, and it thus had a long-term, sustainable effect on the company's growth.
- In addition to the loan, Creative England's investment programme provided Lockwood with many opportunities to promote business, through presentations at our showcase events to

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invitations to roundtables with senior politicians. This helped them get their brand more widely recognised.

Cons:

- As Lockwood publishing are based in Nottingham, and Creative England's offices and staff are based in Bristol and Manchester, most of the contact was on the phone and not face-to-face. It meant lots of travel time when the team had to come to Creative England's head office in Bristol for meetings, taking up valuable business hours.
- Creative England's investment programme is designed for all screen-based and digital businesses, so is not specific to games developers. The company would have benefited from specific games sector expertise along with their investments.

WOULD YOU CHANGE ANYTHING ABOUT THESE PROGRAMMES?

"The programme would involve more face-to-face contact with Creative England staff and sector experts. Adding in more opportunities for us to network with private investors such as business angels and VC funds would be very useful, to help unlock future investment and create a sustainable path to finance after the Creative England business loan terminates and when companies are searching for bigger investments."

WHAT ARE YOUR FUTURE PLANS?

Lockwood's turnover is continuing to grow and the company predicts that it will be close to £19 million in 2019. The company plans to continue expanding and growing its European sales, and is currently recruiting for 25 new positions, including senior-level individuals to develop the product and expand it to new platforms. Lockwood aims to be the biggest social and mobile gaming company by making its product, Avakin Life, a collaborative, user-driven game that's used all over Europe and then around the world. The company will soon expand the product with the addition of a version available on PC platforms. Lockwood plans to continue increasing its number of employees and to open new European offices in key target markets such as France and Germany.

BASQUE COUNTRY

BASIC DATA

Company name: VirtualWare 2007 S.A.
Address: Pol. Ind. Artunduaga, 3 – M5, 48970 Basauri, (Bizkaia)
Sector: Video games
Date of establishment: 2003
Number of employees in 2018: 45
Turnover: In 2018, turnover was €4,715,393.00

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ORIGINS OF THE COMPANY: WHERE DID THE INITIAL IDEA COME FROM? WHICH MARKET NEED WAS INTENDED TO BE MET?

Virtualware was in 2004 as the result of an idea that three computer science engineers came up with between the 2001 and 2002. Their intention was to include immersive technologies (technologies that we are still passionate about) in various fields that differed from the ones used at that time. Proceeding from a technical and emotional viewpoint, rather than from than from the business perspective, we decided to establish company in order to make an effort to bring the technology that we were passionate about into a different world. That was the vision that we had from the beginning of the company and it we still have the same vision, as we continue to believe in it and to develop it as part of our daily routine, which is to say that we are continuing to strive to add value for the different customers and the sectors in which we are immersed, making use of these novel technologies.

WHAT HAS THE COMPANY'S EVOLUTION BEEN LIKE SINCE ITS ESTABLISHMENT AND THROUGHOUT ITS GROWTH? WHICH CHANGES HAVE HAD THE GREATEST IMPACT (E.G. CHANGE OF BUSINESS MODEL, DIVERSIFICATION OF THE PRODUCT/SERVICE OFFERED, ACCESS TO NEW SECTORS, INTERNATIONALISATION)?

Well, it has been a long time since the company was established and there have been a lot of different tiny changes…but we tend to say that the company's growth could be closely linked to diversification, the markets we address, etc.

At the beginning and particularly during the early years of the company (2004-2006), our business was focused on the architecture, engineering and building sectors, and the so-called real estate and building sector, where we began to work with different customers. Once we began working and had different projects in those areas, we decided as a company to look for new niche markets, where we thought we could contribute with our knowledge in different areas. In this way, we decided to begin with our diversification, especially when we received positive feedback from the market in the real estate area. That decision, which was related more to the way we understood the company and maintaining the aim of adding value to the sector, led other companies in our sector to cease operations, whereas we managed to move forward. That was a good point to bear in mind and we are still a diversified company in the sector where we are introducing our technology. This milestone, undoubtedly, made us stay and maintain our position in the market and, moreover, it is a part that defines how Virtualware is nowadays and the type of company we are. Regarding other important milestones, there are two that need to be highlighted: one that occurred during 2008 related to different decisions we made regarding the structure of the company, and the other related to the professionalisation of the company's management. I don't know if professionalisation is the correct word to be used, but we geared up with different capacities and structure relating more to the generation of culture in the company and its management, rather than being linked to sales, production and project implementation. This change occurred in 2008 and started to bear fruit really fast and we can now confirm that fact is a key point that maintains Virtualware and its success. The third element that I consider to be another key point, was the one related to the beginning of our internationalisation. This decision and reflection began between 2010-2011, when we started implementing our first actions. In 2013, we established our first subsidiary in Mexico. This was an important milestone with huge relevance for our business in Mexico, as it enabled us to maintain our business as a global company while some of the sectors in which we had been working in Spain disappeared. Finally, beyond all the opportunities we have had and our efforts to penetrate different

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countries where we didn't meet our expectations and things even went wrong, I believe that just the process of internationalisation, of going out, and the experience we have gained and the vision of the world we have (beyond the fields and areas where we feel more comfortable) have enabled us to learn more about the process and have enabled us to gain a lot of knowledge, regardless of our success.

BIGGEST SUCCESS

I would say that our biggest success is closely linked to our capacity to generate a business culture based on different values that we considered to be key to maintaining our position in the market. This is an issue that we started considering in 2008-2010. We decided to generate our own business culture with regard to different fields and matters like innovation, while at the same time establishing our own way of making and fulfilling our commitments. Everything has been focused on creating and developing a business with a high capacity to move, innovate and stay up to date. This is a fact that enables us to stay in the market, especially taking into account the special characteristics of our sector. It is a sector where things change abruptly and where different figures and actors appear and disappear continuously, new enterprises arise covering new, unforeseen fields, etc. Establishing this culture in our company has been our biggest success. This aspect has led to having people with that capacity, and we have to bear in mind that those capacities are obtained thanks to working environments that enhance and promote the acquisition of those abilities. At Virtualware, we promote and foster a working environment where everyone has the freedom to try new things. Moreover, we assume that sometimes we will create and develop things that will not work in the end, while bearing in mind that we mustn't be afraid to try to develop new aspects or things. We use working methods aimed at developing innovation capacity in every field and stage of the company. I believe that, thanks to this way of thinking and acting, we are now at this stage, because we are now able to develop projects that we couldn't have undertaken three years ago, and in the future we will probably conduct and develop other projects that we currently don't have the capacity and knowledge to do. This aspect is one of the key points that enables us to maintain our position and market.

IN WHICH PROGRAMMES DID THE COMPANY PARTICIPATE?

We have been involved fundamentally in aids and programmes closely related to innovation. On the one hand, we have received support through aids and grants linked to product innovation and new products and product lines that we continuously develop for our customers. On the other hand, not only have we participated in programmes related to technological innovation of products, but we have also been involved in process innovation. The great majority of the aforementioned development of the type of business culture and the management system established in our company has been carried out due to the support received from aids and programmes linked to process innovation. Not only have we been supported by those programmes, but our activity has also been enhanced by different methodologies proposed by the Bizkaia County Council, which has suggested interesting methodologies to bear in mind and implement in companies including SMEs. We have also been supported by aids focused on, among other things internationalisation, access to new international markets, search for new suppliers and distributors, and research of commercial agents that allows us reach new markets. These have been the main key pillars in which we have received support thanks to aids and programmes promoted by the Bizkaia County Council.

WHAT WERE THE PROS AND CONS OF THESE PROGRAMMES?

I think the advantages of these programmes are….well, as I mentioned before, there are two aspects to bear in mind, one related to the main characteristics of those programmes and aids and, on the other hand, there is another aspect of those characteristics that could also be considered a drawback.

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Anyway, I think that one aspect of those aids that should be highlighted is their incentive effect on the company. The incentives motivate companies to perform and carry out different aspects that, in some way or in some cases, we wouldn't have conducted due to lack of knowledge. Perhaps if we didn't have that incentive or support, we wouldn't feel confident enough to undertake them. In this way, I think that this aspect is an advantage of these kinds of initiatives, programmes and aids. I believe that in this way, in some cases and with specific aids, the fact that the companies are informed about different methodologies that are being enhances and promoted by the Bizkaia County Council is a positive aspect, as these are methodologies that are usually proven and contrasted in other fields. Moreover, these methods have usually been tested in other fields with positive results and maybe in some cases it is difficult for SMEs to become familiar with them (as we are immersed in the daily routine and in other fields and we don't know and don't have information about them). Therefore, I believe that these kinds of aids and programmes enable us to implement these kinds of tools. I would say that there could be two main advantages. With respect to drawbacks, I believe that in some cases they are linked to the management of the funds and the way these aids are being funded. The way in which the economic part of these aids arrives to the company can in some cases be a limiting aspect depending on the size of the company.

Virtualware now has significant size and resources, so this aspect could not be a limiting one for our company. Nevertheless, for smaller companies and especially for the creative sector, the fact of receiving money after a period of time when you have already undertaken all the actions and investments (a short period or a longer one depending on the type of aid) could be considered a limitation of the incentive effect. This drawback is an important aspect of the supporting programmes and aids that perhaps makes the incentive aspect an option only for medium-sized companies and not for smaller ones.

IS THERE ANYTHING YOU WOULD CHANGE ABOUT THESE PROGRAMMES?

Well, I would obviously try to find different mechanisms that could also be alternative or complementary funding mechanisms to the ones currently available, that could be focused on closing the gap between the period of time between the moment that an activity is undertaken and the moment when the company receives the funding. Furthermore, this idea could be raised in different ways depending on the size and resources of the company. It would be quite logical that this gap would be necessary only for a particular size of companies. Therefore, the aim would be to encourage smaller companies to apply to these programmes with different funding mechanisms, so as to promote and enhance them and enabling them to become medium-size companies (that could be the key point). I think the Public Administration and, in this case, the Bizkaia County Council, have been taking into consideration other issues and topics, as well as other aids and programmes that have also evolved and adapted based on the feedback received from companies and from the industrial sector. Certain types of aids is specific areas were initially designed for the industrial sector and were focused on the promotion of issues related to investments, etc. From my point of view, these aids have evolved in the past few years.

At least here, we can now find aids and programmes that have expanded their scope and are now focused on other necessities, like the specific requirements of the creative industries or other technological fields. This could be the main element to work with.

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WHICH PROGRAMMES OR SERVICES OFFERED BY THE BIZKAIA COUNTY COUNCIL WOULD YOU CONSIDER THE MOST USEFUL ONES DURING THE EVOLUTION OF THE COMPANY?

That is a difficult question. I believe that there have been different valuable programmes, especially if we take into consideration their incentive quality and character. Nevertheless, we believe that if, behind all these programmes, there is not a strong commitment of the company and there is not any kind of strategy behind the initiative and the project, that the incentive and support do not make sense. In other words, there is no single agent that makes the project go ahead.

Bearing in mind all the issues and aspects that I previously mentioned, I would highlight the area of innovation focused on the process. Every work we undertook in relation to process innovation, new management systems and the participation of every member of the company in the process was a critical feature that helped us to initiate, activate and incorporate an innovative culture among the members of our company. This is a factor that enables us to react quickly and a factor that we consider to be one of the biggest successes. From my point of view, this is one of the most interesting tools we have worked with.

We currently offer a product and a technology that have already been patented and on which we are basing the future of the company. Virtualware has wagered on that product and technology, and we have also received support from Bizkaia County Council through aids and programmes intended for the promotion of innovation and technological development. Therefore, we consider the support of the Public Administration to be an important enhancement that allowed us to be more intensive and to develop a bigger commitment in the development of this technology. Otherwise, it is likely that we wouldn’t have been so intensive in the process. This has led us to be in the position that we are in with this technology (we have set great expectations for this type of technology). These could be considered the main areas and fields where we have had the greatest impact.

WOULD YOU CONSIDER THE COMMITMENT TO INNOVATION AND COMPETITIVE AWARENESS TO BE ONE OF THE MOST RELEVANT MILESTONES DURING THE GROWTH AND DIVERSIFICATION OF THE COMPANY?

We consider innovation to a capacity rather than a milestone. Due to the type of company we are, Virtualware wouldn’t be positioned as it is now if we considered innovation to be an objective and not a capacity, as we do. We need every person in the company think continuously of different and new ways of applying technology, solving customers’ problems in new ways, etc. The key point for our company to be competitive is to be up-to-date in the latest technologies of the industry and our sector. Therefore, we understand and consider innovation to be an element that enables us to survive and stay in the market rather than a fact that makes us more competitive.

If we didn’t have this innovation capacity in every member of our company and in our organisation itself, we would no longer be in the market. Therefore, innovation and competitive awareness are considered to be a tool and an indispensable element to stay where we are. It is not that this capacity puts us in a better or worse position in the market, but it is true that if we didn’t have it, and I am sure that if we lose that capacity as a company (taking into consideration the strategy and the vision that we now have), we wouldn’t be able to remain in the market. This is an issue that we understand quite clearly.

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WHAT ARE YOUR FUTURE PLANS?

As for the future, we are already taking part in a good number of projects/plans in Europe and the United States, where immersive technologies and immersive companies are becoming commonplace, and we very much want to work on that area. The present background is quite a favourable context, as a brand-new technology made a solid appearance in the market and we have been involved in that technology for 15 years. We have made great efforts to “spread the message”, to convince companies about the value added of those technologies, and, luckily, companies are now beginning to require these types of technologies. This fact also implies a different context, as there has been very little competence in the past, whereas at present the demands are explicit and competence is thus growing higher.

We find ourselves in a time of stronger growth; the company intends to keep growing as it has been doing in recent years, which is to say that we are willing to continue with the strategy of developing extremely innovative and value-added solutions for our clients. Virtualware will keep growing in that culture and will certainly keep doing things as it has been doing until now. As for markets, we know which ones we are determined to tackle. Our focus lies in Europe, in places such as Germany, France and the United Kingdom, as well as the domestic market in Spain. We are now taking our chances in accessing the US market. We are part of several associations and have taken part in some events in the US; we even have some American clients. So, we would very much like to see that a very important part of our company operates in the US market.

When it comes to solutions and products, we are currently investing our efforts in the development and creation of rooms such as the ones Virtualware has for big companies and rooms developed on the basis of the new patented technologies we set into motion a year ago and the software platforms we have built. These platforms provide our clients with virtual-reality rooms so that they can work on topics such as training, engineering and marketing. These are our main areas of activity. Virtualware envisages a growing business scenario for the coming three years, as we expect to double our turnover beyond what is in our current strategic plan.

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