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# **CROSS-COUNTRY REPORT ON CULTURAL AND CREATIVE SECTOR**

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The list of the partners who contributed to this report:

FRANCE:

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## 1. INTRODUCTION

The cultural and creative sectors are a vital part of the European economy, accounting for over 3% of GDP and 11 million jobs. The sector is also an important driver of innovation, creativity, and growth.

However, the sector has been hit hard by the COVID-19 pandemic, with many businesses forced to close their doors or significantly reduce their operations. This has had a knock-on effect on employment, with over 1 million jobs lost in the cultural and creative sectors since the start of the pandemic.

In this report, we take a look at the current state of the cultural and creative sectors across Europe, highlighting the key challenges and opportunities that lie ahead in terms of entrepreneurship, training needs, digitalization, and the effect of pandemic on the sector.

In this regard, the report provides an overview of the cultural and creative sectors in Europe, covering France, Ireland, Italy, Cyprus, Bulgaria, and Greece representing the six countries in the European Union (EU).

The qualitative and quantitative data provides an overview of cultural and creative sectors across Europe. It presents a general overview of cultural and creative sector including education, employment, economic growth, the effects of COVID-19 pandemic, challenges and opportunities, required skills and digitalization across all cultural and creative sectors including but not limited to performing arts; visual arts; publishing activities; music production, sound recording and broadcasting; film production; broadcasting organizations; museum services; design activities; publishing activities; other cultural activities.



## 2. LITERATURE REVIEW

### 2.1. France

#### 2.1.1. Cultural and creative Industries

*"The cultural and creative industries are the driving forces of our culture. Architecture, books, cinema, music, audiovisual, press, radio, video games, visual arts or performing arts: the sectors they represent weigh 640,000 jobs and 91 billion euros in turnover. It is to make them fully benefit from this economic potential that we are launching, the State's General of the CCIs.*

*Franck Riester, Minister of Culture, France*

Cultural and creative industries (CCI) are the sectors of activity whose main purpose is the creation, development, production, reproduction, promotion, dissemination or marketing of goods, services and activities that have cultural, artistic and/or heritage content. The sector is recognized by several characteristics: (1) Creativity at the heart of the activity, (2) Artistic, cultural or creative content of the past, (3) The production of goods and services frequently protected by intellectual property, (4) The dual nature: economic (generation of wealth and employment) and cultural (generation of values, meaning and identity), (5) Innovation and creative renewal, (6) A demand and behavior of the public that is difficult to anticipate, (7) A sector marked by the non-systematization of wage labor as a mode of remuneration for work and the predominance of micro-enterprises.

Since Antiquity, the different powers (Kingdom, State, Church, etc.) have tried to instrumentalize arts and culture in France. And for a long time, they were reserved for the nobility and the urban bourgeoisie. Then the arts were made part of the emancipatory project of the 1789 Revolution to educate the "new citizen". The "nationalization" of the Church goods, the emigrated nobility, and the monarchy, after the insurrection of 1792 which precipitates the fall of the royalty, constituted an immense transfer of property to the nation. This was the invention of the national heritage. It gave rise to the birth of cultural institutions (libraries, museums, and archives) that materialized a political will to make culture accessible to the people.

Finally, in the 20th century, the consumer society, especially after the Second World War, offered the greatest number of people better living conditions and the possibility of access to cultural consumption. In 1959, the creation of a Ministry of Culture constituted an important step. The democratization of culture was driven under the Fourth Republic with a policy of decentralization of the theater. Then, in 1961, an ambitious program of cultural centers aimed at allowing the public and the works of art to meet. Gradually, many mediation devices were developed within cultural institutions.

The creative and cultural industries are one of the mainsprings of the French economy. Skills are key to sustaining this growth, and addressing current gaps and shortages is a priority to ensure the sector continues to thrive. Cultural and creative industries are also a key component in France's global influence and competitiveness. Despite its strong position in the economy, the creative and cultural sector<sup>1</sup> is facing a number of skills challenges, which could threaten its continued growth and prosperity.

In France, there are ten sectors identified within CCI. These are music, performing arts, graphic and plastic arts, cinema, video games, press, publishing, audiovisual, architecture, advertising, The amount of revenue generated solely by these ten leading industries accounted for more than 90 billion euros. According to France Creativa, a non-profit association dedicated to the development of CCI, this amount accounts for more revenue than the revenue generated by luxury or pharmaceutical industries. The value added of CCIs in 2017 is €47.5 billion or 2.3% of the national economy. Jobs in culture account for 3% of those of the economy as a whole. They are often characterized by a multiplicity of positions held during the year. The accumulation of employee and self-employed status is also common. In addition, CCSI supplies more than one million direct or indirect jobs.

Nowadays, the French CCIs, which cover 10 different sectors (Architecture, Art of Living, Visual arts, Gastronomy, Audiovisual media, Print media, Fashion, luxury and beauty, Heritage, Advertisement, and Live show), are experiencing a very positive growth. With 1,000 professions and 300,000 companies, organizations, and associations, they have a significant economic weight in France, and reinforce its international appeal. They have grown by 6.7% between 2013 and 2018. In 2018, they generated a turnover of 91.4 billion euros. The Ministry of Culture estimates that their participation in the country's GDP is 2.3%. Leading the way, the visual arts account for a quarter of the cultural sector's revenue.

Finally, French CCIs have a predominant place in the world with: the world's leading music production and publishing company (Universal Music Group), one of the world leaders in music streaming (Deezer), the 1st European broadcaster (TF1), the 2nd most diffused musical repertoire after the Anglo-American repertoire, the 2nd largest publishing group (Hachette), the 3rd largest video game publisher (Ubisoft), the 4th largest art market, the 3rd largest film producer, the 2nd largest film exporter behind the United States, and the 3rd largest producer of animated films in the world. The European Cultural and Creative Industries Alliance (ECCIA), is composed of the five national European luxury good organizations - Circulo, Fortuny (Spain), Fondazione Altagamma (Italy), Meisterkreis (Germany), Walpole (United Kingdom) and of course, the prestigious Comité Colbert for France with members such as:

- Haute Couture and Fashion brands - Lanvin (1889), Chanel (1912), Lacoste (1933), Pierre Balmain (1945), Céline (1945), Christian Dior Couture (1947), Chloé (1952), Givenchy (1952), Yves Saint Laurent (1962)
- Leather Goods brands - Hermès (1837), Berluti (1895), Louis Vuitton (1854), Longchamp (1948).
- Fragrance and Cosmetic brands - Guerlain (1828), Caron (1904), Parfums Chanel (1924), Rochas (1925), Lancôme/L'Oréal Produits de Luxe (1935), Parfums Christian Dior (1948), Parfums Hermès (1948), Parfums Givenchy (1957), Yves Saint Laurent Parfums (1962)
- Jewelry and Crystal brands - Baccarat (1764), Breguet (1775), Cartier (1847), Boucheron (1858), Van Cleef & Arpels (1906)
- Wine and Spirits brands - Château d'Yquem (1593), Veuve Clicquot Ponsardin (1772), Champagne Bollinger (1829), Château Cheval Blanc (1832), Champagne Krug (1843), Château Lafite-Rothschild (1855)
- Gastronomy brands - Dalloyau (1682), Hédiard (1854), Lenôtre (1957), La Maison du Chocolat (1977), Pierre Hermé (1996), Alain Ducasse au Plaza Athénée (2000), L'Atelier de Joël Robuchon Étoile (2010).
- Hospitality brands - Le Meurice (1835), Le Ritz (1898), Le Plaza Athénée (1911), Le Bristol (1924), Le George V (1928).

### 2.1.2. Definitions and concepts

European Union provides an open-ended definition of cultural and creative sectors, permitting each Member State and individual to define the sector. As an overall not strict and restrictive definition, EE distinguishes activities included values and/or artistic and other creative expressions either aiming to enter into labor market either not. In particular, cultural and creative industries includes activities which referring to architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts. In order to support and disseminate these activities, European Commission had developed 2007 European Agenda for Culture and following this; a new framework developed and in 2018 a New European Agenda for Culture had been adopted.

*Cultural industries:* The term refers to industries which integrate the creation, manufacturing and commercialization of innovative contents which can be intangible and cultural in nature. The contents are commonly covered by means of copyright and they are able to take the shape of an awesome or a service. Cultural industries usually consist of printing, publishing and multimedia, audiovisual, phonographic and cinematographic productions in addition to crafts and design (Europa Regina, n.d.).

*Creative industries:* It includes a broader variety of sports which consist of the cultural industries plus all cultural or inventive manufacturing, whether or not stay or produced as a man or woman

unit. The innovative industries are the ones wherein the service or product includes a great detail of inventive or innovative endeavor and consist of sports consisting of structure and advertising (Europa Regina, n.d.).

### **2.1.3. Education and employment in cultural and creative sector**

To develop cultural and creative industries, stakeholders in the sector must be trained as professionals for jobs in different roles such as executive management, the management of cultural and creative facilities and in technical cultural and creative professions. In France, Agence Française de Développement (AFD) strives to develop sustainable training programs while benefiting from French expertise. AFD provides technical support and offers capacity building activities to develop these sectors. In this regard, AFD sets up film schools or establishes museum and heritage training. Moreover, audiovisual activities (post-production) were delivered to professionalize image and sound production. The French film school La CinéFabrique, housed at University Lyon 2, develops experimental and innovative education that allows students to acquire technical skills to launch their career in the audiovisual arts.

There has been a 7.1% growth in the workforce between 2013 and 2018. Today, jobs in the cultural sector represent 3% of those in the economy. They are often characterized by a multiplicity of positions held during the year. The combination of salaried and self-employed status is also frequent.

1.3 million people received direct or indirect income from a cultural or creative activity in 2018. Among them, 1,043,000 people were involved in the realization of an artistic, technical or service activity that directly contributed to the creation of cultural content, and 244,000 people indirectly (distribution networks of cultural goods, sale of technological goods, music manufacturing). Music and live performance are the two sectors with the largest workforce. These two sectors cover the entire territory and include a significant number of workers in technical professions, alongside authors and artists.

There is also a great diversity of jobs and profiles in the CCIs. Feminization, multi-skilling, rejuvenation and metropolization are the main demographic markers. Indeed, a dynamic of feminization of the CCIs has brought the share of women in the cultural professions to 43%. However, it conceals strong disparities between the fields: 52% of women among journalists and publishing executives, but only 29% among entertainment technicians. Almost one out of two CCIs employees working in two professions at the same time in the image and audiovisual project writing professions. The growing film production and video game publishing sectors, whose workforces are increasing, have average ages of 37 and 32, making the CCIs workforce rejuvenate. A dynamic of metropolization, which impacts all sectors of the French economy and

tends to concentrate creative economy players in major urban centers. However, the territorial presence of CCIs remains significant in certain sectors: for example, venues for live music and variety shows are located in about 1,500 French municipalities, including outside of the major metropolitan cities.

In addition to the demographic fluctuations, CCIs are impacted by structural changes that contribute to renew the cultural professions. One of the major changes is the digital revolution, which requires professionals to continually expand their field of expertise. This is evidenced by the increased use of continuing education: the access rate to training bodies by CCI' permanent employees increased by 5.5% between 2015 and 2017.

The training assets of the CCI sector are structured in a large network that is made up of a hundred of higher education. These federate a community of more than 50,000 students (60% of whom are women), 12,000 of whom are studying for a master's degree in these institutions of excellence spread throughout the country. Many of these prestigious ICC programs are highly recognized in France and internationally such as Ecole du Louvre, Beaux-Arts de Paris, Ecole Boule, La femis, Ecole Nationale Supérieure des Arts Décoratifs, Conservatoire National Supérieur de musique et de danse de Paris, etc.

The CCI sector plays a key role in providing access to employment. Indeed, it facilitates the inclusion of the most vulnerable social groups. Creative entrepreneurship has been boosted by digital technology, which has profoundly changed the way culture is produced, disseminated, and consumed. However, it is still often hampered by problems of access to financing (AFD, 2020). In this regard, funding systems such as providing direct support for entrepreneurs and encouraging banks to invest in this sector are suggested instruments to support CCI entrepreneurship.

On the other hand, throughout COVID-19 related lockdowns all around the world, cultural and creative sector (CCS) professionals were the critical people – for human well-being and mental health at home. Online concerts, music, film, books, artwork classes, and dance gave us the energy and the resilience we had to face an unsure future. Despite this, the CCS experience a cultural emergency, today, with hundreds of thousands of CCS professionals unemployed or underemployed (UNESCO, 2021).

#### **2.1.4. Cultural creative sector in economic growth**

The French cultural creative sector is one of the most dynamic and fastest-growing sectors in the French economy. It generates annual revenue of more than €100 billion, or 3% of the country's GDP. In addition to its economic impact, this sector is also a major contributor to international competitiveness through innovation and creation in France. The cultural creative sector has a

significant role to play in the economic growth of France. It is the second biggest contributor to GDP after agriculture, employing 3% of the population and generating 7.5% of overall GDP in France. With almost 300,000 companies, it generates an annual turnover of EUR13 billion or about 1% of the total French economy.

There is a growing literature on CCS and its economic value that CCS can drive the economies at European level forward and help communities respond to the challenges of globalization (ie. KEA, 2009; EU Green Paper, 2010). French cultural and creative industries (CCI), which generate substantial export revenue, also contribute to the development of tourism in France and to the attractiveness of the French university system. (Europa Regina)

Added to this economic consideration is the issue of France's reputation and influence abroad, sustained by the soft diplomacy promoted by the French Ministry of Foreign Affairs in conjunction with the Institut Français and the French cultural network abroad. (Europe Regina)

In both the cultural creative industries and the rest of the economy, France's economic profitability is lower than that of Europe. The dominant cultural industry varies from one country to another. Just as business size, profitability and productivity varies from one sector to the another, the national structure of cultural industry production has an influence on the level of these economic performance indicators: for example, newspaper publishing companies are on average ten times larger than audiovisual production companies; therefore the average size of cultural businesses in the country where publishing predominates will be higher than that of a country where the audiovisual sector commands a comparable share. (Europe Regina) One of the most commonly used indicators of economic profitability is the profit margin, whereby the gross operating surplus is equated with value-added, i.e. measuring the percentage of value-added achieved by businesses after taking into account salary costs and taxes on production. (Europe Regina)

Across all economic sectors (industry, services, trade), the margin rate of French businesses falls below the European average. This is a well-known and enduring result, which is, on the one hand, explained by the large proportion of salaried work (in comparison with other countries such as Italy, where unsalaried employment is far more frequent in such sectors), and, on the other hand, by costs relating to production issues, both capital (through taxes on production) and labor (essentially non-salary -related costs, aimed at maintaining the French social welfare model). (Europe Regina)

The cultural industries are no exception: average French margin rates (30%) are far lower than the European average (41%). The lower performance of the French cultural industries is not down to the particular structure of the sectors in France, in which the audiovisual predominates, as the

margin rate in this sector is higher than that of other French cultural sectors. For any given sector (books and press, audiovisual, advertising agencies), the French profit margin is invariably lower than the European average, with the exception of motion pictures and television programs. (Europe Regina)

#### **2.1.5. Covid-19 pandemic impact on cultural and creative sector**

Together with tourism, the CCS are among the sectors most affected by COVID-19, regarding both the burden of the lockdown measures and the already existing fragility of the sector (European Parliament, 2021). Since November 2019 the world has been battling the pandemic caused by the Severe Acute Respiratory Syndrome Coronavirus 2 (SARS-CoV-2), also known as 'Coronavirus Disease 2019' (COVID-19) (Barrero, Bloom, & Davis, 2020). This ongoing pandemic has brought significant losses for countless businesses, leading to serious disruptions for many industries (Leite et al., 2020, Ivanov, 2020, Prentice et al., 2020, Mehrolia et al., 2021). Along with the traveling, hospitality and retail trade sectors, the cultural and creative sector have been severely affected by the COVID-19 pandemic.

The CCS, crucial for the European economy and the well-being of its citizens, has been profoundly wounded by the measures taken to fight the spread of Covid-19 pandemic. Suddenly, with the outbreak of the virus, global production has been stopped, affecting the whole value chain: events have been postponed or canceled, the related marketing, distribution and touring too. Bookshops, cinemas, concert halls, clubs, museums, theaters, heritage sites or art galleries have been closed down, and have negatively affected cultural workers, freelancers, the self-employed and other stakeholders in the creative sector. (Joffe, 2020, Ratten, 2020a, Ratten, 2020b, Ratten, 2020c, Pacella et al., 2020)

The impact of the Covid-19 crisis on the cultural sector resulted in an average revenue decline of 25% in 2020 compared to 2019. The largest effect was on the performing arts (-72%), heritage (-36%), visual arts (-31%) and architecture (-28%) sectors. In the performing arts sector, one in two companies is threatened with bankruptcy.

Movie theaters were almost empty in 2020 with 65.10 million admissions, compared to 210 million in 2019. A decline in attendance of 69.4%, reports the CNC. Dozens of releases were postponed, and the stock of films were on hold for so long it was estimated at more than 300 in January 2021. People went back to the movie theaters at the end of October 2020 with 3 million admissions recorded. But the summer 2020 had been difficult, following the reopening, with a loss of 500 million euros in sales.

In the art sector, museums lost three-quarters of their sales. Museums and monuments were closed for nearly six months, and when they were able to reopen during the summer 2020, it was with a reduced capacity. The Louvre saw a 72% drop in admissions in 2020, with 2.7 million visitors (9.6 million in 2019). The loss of revenue amounts to more than 90 million euros. A drop in attendance similar to that of other major Parisian museums such as the Orsay and Orangerie museums (by 77%), the Pompidou Center (by 72%) or the Palace of Versailles (by 75%). The national monuments welcomed 10 million visitors in 2019, only 3.5 million in 2020.

Regarding art galleries, if the year 2020 has been rough, 2021 and 2022 are simpler. The Professional Committee of Art Galleries had shown in a study a loss of at least 25% of turnover for two thirds of galleries in 2020. But the reopening was possible in December and attendance increased by 75 to 100% in January 2021.

The book market is one of the few cultural sectors not to have sunk during 2020. While for several months, bookstores were not among the opened "essential businesses", readers were out in full force at the two lockdowns. Compared to the same periods in 2019, sales were up 32% in June 2020 and 35% in December 2020. Independent bookstores have had a decline of only 3.3% of their activity according to the "Observatoire de la librairie".

some estimates provide an essential snapshot of the seriousness of damage suffered by the industry at the present moment. In France alone, the health crisis is affecting 2 000 cinemas, 3 000 bookshops, 1 200 museums, 1 000 theaters, hundreds of art galleries and live events including festivals or trade fairs. According to UNESCO, at the beginning of October 2020, only 37% of world heritage sites had completely re-opened.<sup>6</sup> The numbers are likely to decrease again due to the second wave of the virus; that would cause significant enormous economic damage both for the heritage sector and linked economies, such as tourism.

In September 2020, France unveiled a plan granting EUR 2 billion of the national recovery plan to the sector.<sup>74</sup> The French Minister of Culture then announced in October an increase in the exceptional budget already set to support cultural festivals hit by the crisis with an increase from 10 to 15 million euros over the next two years.

The global sanitary crisis is the opportunity to acknowledge the importance of CCS in nurturing social links, supporting mutual understanding and community engagement with a view to change behaviors and convince people that they are instrumental in solving problems. The pandemic has also stressed the economic importance of the sector notably festivals, live events, museums, cinemas or cultural retailing in making places and territories attractive to locals, tourists and investment



Life cultural experiences are greatly missed during the pandemic and digital streaming is a poor alternative to collective cultural gatherings. It shows that CCS plays a crucial role in the well-being of communities and social cohesion. Culture is not simply entertainment or leisure time. It contributes to collective sense-making. It helps humans define what matters as the globe is confronted with a mortal pandemic, a climate crisis and the threats of technological development to human values. Undoubtedly the pandemic will generate great art. Some theaters are 2500 years old, and citizens will always require space to celebrate culture and storytelling. Artists will capitalize on fear and neurosis. This worldwide pandemic will inspire writing, bringing new literature, new cinematography and lyrics that will question our policies, technology, science and societal behaviors (Report Council of Europe, 2020).

#### **2.1.6. Challenges/Opportunities in CCS**

As a leading sector of the French economy, the cultural and creative industries (CCI) are currently facing considerable challenges related to the digital and ecological transition and the hyper competition created by the creation of global digital players. Changes in usage, increased competition from international players, and the disruption of the modes of creation, production and dissemination are all issues that reflect common problems and invite the development of cross-cutting actions aimed at CCIs. (Ministere De La Culture). Many CCI companies are underfunded due to their limited access to mainstream services. Their model based on a prototype economy explains why they are perceived by banking actors as a particularly risky investment. Ambitious actions are now necessary to remove this obstacle to their development.

In order to structure, strengthen and transform the sector in the medium term, the State is making a massive effort of 1 billion euros around two complementary actions: An acceleration strategy for CCI innovation, financed over five years to the tune of €400 million by the 4th Future Investment Programme (AIP). Built around thirty or so devices dedicated to innovation support for the 12 CCI sectors, it constitutes a global response to the challenges of transformation of the entire sector. The first devices resulting from this approach, which concerns the financing of innovation, the development of innovative technological bricks, or the digital and ecological transition of cultural actors, were able to start deploying from the end of the first half of 2021 and resulted in the activation of €100 million of AIP credits for cultural actors. (Ministère De La Culture)

The Culture component of the France 2030 Plan, which aims to support the development of the industrial, technical and human capacity capable of producing and disseminating the cultural contents of tomorrow. Within this framework, €600m will be devoted to the development of new immersive technologies, to the facilities for filming and digital production, and to professional training.

### **2.1.7. Skills needed for CCS**

The creative industries workforce is distinctive from more conventional industries such as financial services or manufacturing because it is dominated by a high number of small-to-medium enterprises and work is often freelance or performed on a short-term contractual basis (Bridgstock, 2011). Uncertainty is deeply embedded into the nature of the creative industries, characterized by rapid technological changes where constantly new and complex knowledge is created and demanded and where underlying competencies are needed to improve the skills permanently (Kamprath and Mietzner, 2015). The creative industries are at the forefront of applying new technologies and are described as innovative and as state of the art in terms of adopting ICTs. Müller, et al. (2009) listed the three roles of creative industries in shaping an economy's innovation performance: (1) they are a major source of innovative ideas and thus contribute to an economy's innovative potential and to the generation of new products and services; (2) they offer services that may serve as inputs to innovative activities outside of organizations; and, (3) they are intensive users of technology and often demand adaptations and new developments of technology, providing innovation opportunities to technology producers. All creative industries are similar in that creative professionals are their most important asset (Bridgstock, 2011; Mietzner and Kamprath, 2013). They rely on creative professionals whose individual creativity is a key asset in responding to external changes and trends (Preston, et al., 2009). Because workers in the creative industries are intensive users of technology, technical skills are a first requirement to perform well. As a result, most studies concentrate on these skills, while the softer employee skills tend to be overlooked. Yet, the latter are required to develop the necessary innovation capabilities to handle technological and organizational changes at work (Kamprath and Mietzner, 2015). Mietzner and Kamprath (2013) studied how the digital transformation process has an impact on the working conditions and skills from the perspective of professionals working in the creative industries. Four major skill-shifts emerged: working interdisciplinary; having an open mind about the new; permanently transforming job-specific knowledge; and balancing between a specialist and generalist attitude. Referring back to the framework of twenty-first century digital skills, working in interdisciplinary teams demands considerable communication and collaboration skills from each member (Jeffcutt and Pratt, 2002). Having an open mind about the new means that workers should be able to respond to changes with flexibility, rather than perceiving them as a threat. This requires self-reflection on one's own actions, openness to change, and taking the initiative to create opportunities. The permanent transformation of job-specific knowledge requires professionals working in the creative industries to explore new opportunities, elaborate on new developments, and be creative. Finally, it is about the balance between specialists and generalists; a generalist has a basic understanding across many disciplines while a specialist is a person who has a deep understanding of a specific discipline. As a consequence, the generalist is proficient in defining

the problem and the specialist has the skills to solve the problem. Furthermore, in the creative industries the degree of specialization is high which means employers need specialists who can apply their knowledge. In fields where the degree of specialization is high, learning-by-doing is common practice to improve one's skills (Jeffcutt and Pratt, 2002).

Given the types of skills mentioned in the literature, CCI professionals should possess certain skills to increase either their entrepreneurship or their employment. According to a survey conducted by AFD (2020) on skills gap, 1 in 3 businesses reported a skills gap mostly in following areas: Business marketing and communications skills; Problem-solving skills; Vocational skills relating to business support occupations; Fundraising skills; and Social media skills. Almost all the participants neither disagree nor agree that their organization has a good understanding of what skills are required from their workforce.

Identifying and addressing skills needs in order to sustain this growth is a key priority. Evidence suggests that rapid advancements in digital technologies are breaking down barriers between creative and cultural businesses and consumers. A digitally literate workforce is, therefore, needed to capitalize on the opportunities this presents, but there are obstacles to achieving this. The evidence suggests that the creative and cultural sector has been slow to adapt to globalization and advancements in technology. There is a lack of digital capacity in both the leadership of and processes within the sector, at a time when demand for digital skills, as well as marketing and communication, and financial skills, is increasing. This is leading to a gradual intensification of skills gaps which could inhibit growth.

### **2.1.8. Digitalization in cultural and creative sector**

Undoubtedly, digital technologies have played a crucial role in the innovation of the cultural sector (Rizzo, 2016), it has significantly pushed organizations to rethink and innovate their business models. Digitalization has brought many changes into the field of culture, it has modified the relationship between artists, agents, consumers, it has changed the way culture is mediated to the audience as well as the way culture is consumed and perceived. Advancement in digital technologies might decrease the importance of intermediaries in the art sector, since artists can raise funds via crowdfunding campaigns, they can show their work on their websites or other platforms, they can publish their work online, and they can easily communicate with their audience, clients and consumers. Almost everyone can record a song or video and put it on YouTube and reach thousands of viewers. Digitalization in culture has had a strong impact on the production of cultural content and products. Due to the advancement of communication technologies, people from different parts of the world can cooperate and create content and products together. It has also changed the way cultural workers and artists can promote their work; it is much easier to reach a wider audience with the growth of social media. The change

has not appeared on both sides, demand and supply. Thanks to the digitalization, audiences and consumers have become more involved in the content creation, mainly because digital devices such as smartphones, tablets, laptops, etc. have adapted to be able to create content and passively consume. Many challenges for the cultural sector come together with digitalization, one of them is the issue of copyright, piracy and many others, therefore new models of copyright such as creative commons have appeared. But copyright is still a big challenge and raises many questions like, what is the fair usage of cultural products. Is it fair to share an ebook, CD or DVD with a few of my friends? Is it fair to share this content on the internet with thousands of people?

The Ministry of Foreign and European Affairs and the French Ministry of Culture placed the CCI at the heart of their action and cultural cooperation strategy. France attaches importance at the highest political level to digitalization, which is a challenge as well as a great opportunity to make national and European cultural heritage accessible to everyone. The digitalization of the cultural offer and cultural content is a priority because it is an opportunity for creators and for the cultural economy as a whole.

France is one of the few countries that have implemented a large-scale strategy for the digitalization of its written heritage, a strategy to which Investments for the future will make an important contribution. Indeed, an important component (€750 million) concerns the digitalization and enhancement of cultural content within the framework of the major national loan. The objective is the creation of a real digital cultural sector, a national response to the projects of major international players, in terms of legal offer and quality content, with three priorities: the development of a legal offer in the digital field; the emphasis on research and development and innovative services; the promotion of new ways of valuing cultural and artistic heritage and editorial content.

However, the effort that Member States must make to digitize their heritage, as France does, is not contradictory to financial support from the European Union to promote large-scale digitalization projects and accelerate the digitalization process across Europe. Indeed, in order to help build digitized corpora relevant to European level (for priority content or on themes with European added value), the European Commission's support for digitization operations carried out in the Member States should be strengthened. France had expressed, in its response to the "Europeana" consultation, its desire to go beyond the priorities that each State sets for its national collections and to promote the digitization of ensembles that make it possible to virtually reconstruct collections scattered by history. The digitization of such corpora to make them available on Europeana should be supported by the European Commission. France also remains the leading contributor to EUROPEANA, both in terms of content and funding (including the Netherlands and Germany).

In addition, at the Council of European Ministers of Culture in November 2009, the French Minister called for the establishment of a committee of wise men on issues related to the financing of digitalization, and more particularly public-private partnerships, in a context where Google proposed to many European cultural institutions to digitize their funds, this committee was able to issue its report on January 10, 2011, entitled "The New Renaissance".

There is a big difference in the digital transformation trajectories of the information goods and physical goods markets:

- The information goods sectors (press, music, video, films), whose content is dissociable from the physical medium, were the first to be affected by the digital transformation, notably because the dematerialization of their content made copying "easy" and peer-to-peer piracy networks proliferated on the Web, taking the vigilance of public authorities by surprise. These sectors, which have seen the value of their content drop drastically, have been forced to rethink their business models very quickly.
- Industries whose activity is based on the marketing of physical goods or on "live" events (museums, live performances) were affected later, without calling into question the very nature of their creations. However, they are not exempt from the obligation to adapt to new distribution channels (e-commerce, mobile, etc.). And although it is less visible, they are also impacted in their way of designing and manufacturing (virtual reality, co-creation, etc.).

Here are some important transformations:

- Traditional attributes of the CCIs challenged: Historically, the CCIs have based their strength on three strategic assets: their brand image, their know-how and their intellectual property rights. Assets that are now being challenged in the digital age. Indeed, their brand image is exposed to comments on social networks and subject to the risk of "bad buzz". Their traditional know-how is affected by the rise of machines and automation. And their intellectual property rights are affected by the piracy allowed by the dematerialization of content. As a result, the industry can no longer rely on its historical assets and has to reinvent itself, New business models, new products, new formats.
- Data to better identify public expectations with a risk of curbing creativity: The CCIs function as a supply-side economy where the creation of works and cultural goods does not respond to a particular demand. As a result, the sector is characterized by an overabundance of goods and a high failure rate. But digital technology, with its big data processing technologies, is in the process of overturning this paradigm: from now on, data is used even before the creation of content to identify the public's expectations as

accurately as possible and to design products that we know are already adapted to their expectations. A way to reduce the risk-taking inherent in art and creation at the risk of curbing creativity.

- With digital technology, new forms of prescription are emerging: In all branches of the CCI, from live performance to fashion to the media, there are bodies that play the role of curators, of "gatekeepers" to select the goods and works that deserve to be exhibited to the general public. This editorial function remains essential, but it is also being transformed under the effect of digital technology, with the appearance of new forms of prescription: prescription through data analysis, from peer to peer, and by the new influencers.
- The public becomes an actor of its consumption and even of the creation of products. No more top-down approach where publishers created and the public consumed. Nowadays, the public becomes an actor of its consumption and even of the creation of products. In its report, Bpifrance Le Lab identifies four types of customers in the cultural and creative industries: the ambassador customer, the creator customer, the prescriber customer and the contributor customer.

In addition, the digital revolution contributed to renew the cultural professions. There has been a diversification of cultural professions, which forces professionals in the creative economy to continually expand their field of expertise. This is evidenced by the increased use of continuing education: the rate of access to training organizations by permanent employees of CCIs increased by 5.5% between 2015 and 2017.

#### **2.1.9. Government policy**

As a leading sector of the French economy, the CCIs are currently facing considerable challenges related to the digital and ecological transition and the hyper competition created by the creation of global digital players. Changes in usage, increased competition from international players, and the disruption of the modes of creation, production and dissemination are all issues that reflect common problems and invite the development of cross-cutting actions aimed at CCIs.

In order to structure, strengthen and transform the sector in the medium term, the State is making a massive effort of 1 billion euros around two complementary actions:

- An acceleration strategy for CCI innovation, financed over five years to the tune of €400 million by the 4th Future Investment Programme (AIP). Built around thirty or so devices dedicated to innovation support for the CCI sectors, it constitutes a global response to the challenges of transformation of the entire sector. The first devices resulting from this approach, which concerns the financing of innovation, the development of innovative

technological bricks, or the digital and ecological transition of cultural actors, were able to start deploying from the end of the first half of 2021 and resulted in the activation of €100 millions of AIP credits for cultural actors.

- The Culture component of the France 2030 Plan, which aims to support the development of the industrial, *technical*, and human capacity capable of producing and disseminating the cultural contents of tomorrow. Within this framework, €600m will be devoted to the development of new immersive technologies, to the facilities for filming and digital production, and to professional training.

Following the COVID crisis, several government financial aids were also set up. The Government and the Regions have set up a Solidarity Fund for natural and legal persons engaged in an economic activity who meet the eligibility criteria, in particular artists-authors, who are able to benefit from assistance of up to €10,000 from this solidarity fund. The National Centre for the Visual Arts (CNAP), one of the operators of the Ministry of Culture's policy, created the second part of the Exceptional Fund for the guarantee of artistic income for artists-authors in the field of visual arts. This financial support is developed in order to help artists-authors facing economic difficulties during this health crisis and having not been able to benefit from other aid during the period concerned. The disciplines concerned are decorative arts, sound creation, curatorial work, design, graphic design, drawing, printmaking, engraving, film, installation, new media, painting, performance, photography, sculpture, art theory and criticism, video.

Other exceptional measures have been put in place such as: a 100 € inflation allowance, deferral of rent and water, gas and electricity bills for the artistes' professional premises, the exemption from withholding tax (payment of contributions by the publisher/client on behalf of the author), modulations of social contributions, lowering the threshold for entitlement to daily sickness and maternity/paternity benefits, the spreading of tax debts, etc.

## 2.2. Bulgaria

### 2.2.1. Cultural and creative industries

Bulgarian cultural space is constructed from hundreds of thousands of artefacts, the fruit of thousands of years of history. On the one hand, there are immovable and movable monuments of cultural heritage. On the other hand, there is the "intangible cultural heritage" and the "living" continuously creating art in its numerous genera, types and genres. Third, the products of the creative industries of the high technology age are added to this wealth. And fourth, the activities called to revive and socialise the "cultural reserves" so that they become working creative centres and mass destinations for historical, archaeological, geographical, ethnographic, and art tourism. Currently, nearly 40 thousand immovable cultural properties are protected under national

legislation, out of which seven are inscribed on the World Heritage List, and more than 7 million exhibits are kept in museums and art galleries. This enormous wealth is constantly being supplemented and enriched. As of August 2017, a total of 1,362 organisations were registered in the register of cultural organisations maintained by the Ministry of Culture.

In the Republic of Bulgaria, there is a well-developed institutional infrastructure of performing arts, including 51 state cultural institutes, 57 municipal cultural institutes, and over 150 non-governmental organisations in performing arts. In the field of theatre, there are currently 37 state theatres, ten municipal theatres and a dynamically changing number of private theatre formations. In the field of music and dance, there are 14 state cultural institutes, one municipal opera, four municipal philharmonic orchestras, seven chamber orchestras, municipal choirs, 24 brass bands and 20 folk ensembles.

Bulgaria is one of the countries with the richest cultural heritage, which provides an opportunity to use a vast and unique resource that can be the basis for developing different types of cultural and economic processes. Regrettably, this potential is still managed chaotically and inefficiently, isolated from global achievements and trends, and without a clear vision. Many state theatres, orchestras and museums are poorly funded, salaries are meagre; governance often depends on guild interests and lobbying pressure, which distorts overall cultural policy and financial support. During the different periods of its development, Bulgaria's cultural policy has undergone different experiences, some of them diametrically opposed. In the last decade, despite several attempts and changes that have taken place, Bulgarian cultural policy still does not have a clear strategic document that outlines a path for its development

### **2.2.2. Definitions and concepts**

The European Economic and Social Committee considers culture and creativity to be the cornerstone of the EU's core identity values and its social market economy model. As recognized in the Europe 2020 strategy, "Europe's cultural and creative industries play a central role in the growth, competitiveness and future of the EU and its citizens. Moreover, they create a comparative advantage that cannot be replicated elsewhere and are factors for local development and drivers of the industrial change."

As defined in the 2010 Green Paper, cultural industries are "industries that produce and distribute goods or services which, from the moment of their development, are regarded as having a specific quality, use or purpose, and which embody or convey a particular form of cultural expression, irrespective of any commercial value they may have", in line with the 2005 UNESCO Convention. While as creative industries are considered "industries that use culture as an input and have a cultural dimension, although the resulting products have primarily functional



applications", including "architecture and design, which integrate creative elements into broader processes, as well as sub-sectors such as graphic design, fashion design and advertising".

Europe's cultural heritage is a shared source of remembrance, understanding, identity, dialogue, cohesion and creativity. It encompasses a broad spectrum of resources inherited from the past in all forms and aspects. Cultural heritage is:

- tangible (castles, museums, works of art)
- intangible (songs, traditions, etc.)
- digital (born-digital and digitized)

It includes monuments, sites, landscapes, skills, practices, knowledge and expressions of human creativity. Collections conserved and managed by public and private bodies - such as museums, libraries and archives - and film heritage are also part of cultural heritage.

### **2.2.3. Education and employment in cultural and creative sector**

Secondary schools of arts and culture in Bulgaria have their own specificity, which accords them the status of cultural institutes with the primary purpose of providing occupational training and education in the field of arts and culture (Article 13 of the Law on the Protection and Development of Culture). They are situated relatively proportionally throughout the country, with some being in large cities and others in regions with strong traditions in the relevant field of art. There are twenty-three arts and culture secondary schools: 10 art schools, which educate students in the professions of artist and designer; six music schools (four on classical musical instruments, singing and classical dancing and two on folk instruments and folk singing and Bulgarian dancing); three art schools - on music, fine arts and dance; the National School of Dance Art, the National School of Ancient Languages and Cultures; the National Professional School of Polygraphy and Photography.

In 2012, 64.5 thousand people were employed in the cultural sector in Bulgaria alone, and 43.1 thousand people were engaged in artistic professions. When cultural occupations outside the cultural sector (14.3 thousand) are added to those employed in the cultural sector, the total value of cultural employment amounts to 78.8 thousand employees. In terms of the number of persons employed, the cultural sector is a more significant "employer" than other economically essential activities such as "Financial and insurance activities", "Production and distribution of electricity, heat and gaseous fuels", etc. In the cultural sector, the group aged 25-49 has the largest share of employed persons - 68.8%, while their share in total employment is smaller, or 63.7%. Those aged 15 to 24 employed in the cultural sector account for 5.3% and are smaller than those in total employment. Employees aged 50 and over have the highest percentage in the Arts and

Heritage sector (39.8%). Another important demographic characteristic of the cultural workforce is the high educational status. Secondary and tertiary graduates in the arts and culture sector have a high relative share of 14.8% and 10% respectively of the total number of graduates, and the growth in absolute numbers has been above average over the period under review.

Unfortunately, the data found in total for the cultural and creative sectors is older. According to this data, in 2009, the number of people employed in the arts, cultural and creative industries, including cultural tourism in Bulgaria, was 93 232, showing an increase in employment of 4.9% compared to 2008. The growth in these sectors is impressive compared to the growth of total employment in all economic activities at the national level - 0.1%. The specificity of work in the cultural and creative industries attributes a share of about 1/6 in the Bulgarian economy to the so-called "variable work commitments ", without an employment contract, without a permanent term of employment. Contributing to this is the predominance of project funding in the sector.

#### **2.2.4. Cultural creative sector in economic growth**

The arts, cultural and creative industries generate a significant economic output. Over the last decade, they have gained recognition as a specific economic field with great dynamism, with social dimensions creating partnership networks between the public sector and private business. The cultural and creative industries are catalysts for developing new technologies and innovations; they are an integral part of education and modern regional and urban policies.

The cultural and creative industries are proving to be a sector of significant economic importance and positive dynamism for Bulgaria. According to an EY study entitled "Rebuilding Europe. Cultural and creative industries before and after COVID-19" and carried out on the initiative of the European Group of Societies of Authors and Composers (GESAC), before the COVID-19 crisis, Bulgaria was among the countries with the highest contribution of the cultural and creative sectors to the economy - over 2% of national GDP. Moreover, Bulgaria's capital is among the top 10 European cities in terms of income generated by these industries. 7.3% of value added is from the cultural and creative industries sector, and in 2017, nearly 12% of people in the city were employed in the cultural sector. Respectively, however, the impact of the Covid crisis has also been felt most severely. The same report points out that Bulgaria and Estonia are examples of countries where the decline in revenues of cultural and creative industries in 2020 reaches 44%.

However, despite the crisis, the dynamics in the cultural and creative industries will not disappear because creative content is one of the most sought-after on the Internet. According to GESAC, to prevent the loss of talent, consumers and business confidence, the cultural and creative industries must be placed at the heart of Europe's recovery efforts - with funding, legal opportunities and their use as a "driver" for the European economy and society.

### 2.2.5. Covid-19 pandemic impact on cultural and creative sector

The global COVID-19 pandemic has had a profound impact on the arts and cultural sector around the world. The sector has seen radical disruptions to many of its routines, revenues and relationships. Physical distancing has shown all of us how much we need and value connection, culture and the arts.

A February 2022 UNESCO report shows that 10 million cultural sector jobs were lost worldwide during the pandemic, and the global gross value added of the cultural and creative sectors shrank by \$750 billion in 2020 alone.

The situation in Bulgaria is entirely in line with the general trend in the world. In the first three months of the pandemic in these sectors in Bulgaria alone, losses of nearly BGN 15.5 million were recorded. Data from the Employment Agency shows a 98% increase in newly registered unemployed in the culture, sports and entertainment sectors in 2020 compared to 2019. Additionally, the Annual Economic Survey in Bulgaria shows that the added value in these sectors fell by 15.6% in 2020 compared to 2019. The crisis has also negatively impacted industries that did not depend directly on the restrictive measures taken. For example, in the first half of 2020, sales of music on physical media in Bulgaria fell by 22% compared to a year earlier.

Although, according to many analysts, the politicians in Bulgaria did not react quickly and adequately enough at the beginning of the crisis (there was not enough funding to cover the needs of all artists and cultural organisations, parts of Bulgarian culture remained without support), subsequently, a variety of support instruments were applied to different cultural activities. Some of these instruments were a differentiated VAT rate for books, the transformation of delegated budgets in the performing arts, which provide gross remuneration for employees and ongoing maintenance considering the closure of performing arts activities or filling 30-50% of halls capacity.

The most powerful instrument for support of Bulgarian artists and cultural organizations at the national level was the National Culture Fund. According to the Ministry of Culture data, in 2020 alone, about 22.5 million BGN have been channelled into various support programmes and instruments.

Despite all the negatives that the cultural and creative industries have suffered during the Covid crisis, a talk about the positive impact on cultural processes has also started. In Bulgaria, because of the crisis, the Ministry of Culture "has noticed" the existence of independent cultural organisations and artists and has accepted the creation of specialised programmes, especially a programme for structural funding. Many efforts were also made to compensate for the hindrance

of cultural life through online forms of various cultural events. They have also proved to be a tool to expand and attract new audiences. According to some Bulgarian artists, people have returned with a greater passion for art after the pandemic, which can also be noted as a positive effect of the crisis.

#### 2.2.6. Challenges/Opportunities in CCS

There are several main groups of challenges that the cultural and creative industries face in Bulgaria. On the one hand, even before the pandemic, the general public's interest in quality cultural content was not high; the number of visits to theatres, museums, cinemas, and galleries for years was significantly lower than the EU average. The small provincial towns and villages are real cultural deserts, the community centre network does not use its potential.

In a 2019 Eurostat study (Eurostat - Culture Statistics 2019 Edition), Bulgaria's statistics show that on average, 25% of the adult population does not attend cultural events and institutions due to lack of interest, 17% for financial reasons and 10% of people do not feel any kind of closeness or involvement, including a need for culture and art. At the same time, an average of 48% of the population aged 16-74 uses the resources of the internet to access cultural content - such as music and video. Internet content creates a so-called passive consumer, for whom very much everything on the web becomes cultural content, including videos, games, visual material, etc. The same applies to those who only use TV content as a source of culture and art.

On the other hand, funding for culture and art in our country is actually scarce and insufficient. This fact is supported by another study, which points out that in Bulgaria, many financial mechanisms fail to deliver the desired results due to the lack of vision and policies in the culture sector. The data presented shows that most organisations in the cultural and creative sector have a greater preference for public funds and EU programmes than private investment (business angels and bank loans). Meanwhile, several significant problems with public funding mechanisms are reported, such as lack of sufficient transparency, minimal subsidies, and absence of sectoral policies to produce specific support mechanisms for individual sectors. According to the same survey, cultural entrepreneurs in Bulgaria rely mainly on their own funds and a well-prepared team when starting a new initiative. Only 8.3% received a loan when starting their activity, and half of them had a ready product or service. Approximately 1/3 of the respondents were able to attract donors and sponsors to invest in setting up an organisation and implementing an entrepreneurial initiative.

Finally, we should also mention the new challenges for cultural and creative organisations stemming from the widespread use of further information and communication technologies, the

growing importance of media convergence and participatory culture, and the new behaviour of audiences and/or users of cultural content in a digital environment.

While we have highlighted that funding and support for these sectors in Bulgaria are insufficient, we will point out that the possibilities for financial provision are threefold: funding from state and municipal budgets, alternative funding (projects and programmes) and funding through donations and sponsorships.

Funding opportunities from the state budget are provided mainly through the projects submitted to the Ministry of Culture and the National Culture Fund. However, there is also an opportunity to apply to various other ministries and government departments.

Within the grant policy of the National Culture Fund, 2,063 projects were approved for financial support in 2021, amounting to 25,445,122.17 leva.

In addition to the regular 11 programmes of the NFC, in 2021, an additional BGN 20,807,250 million was received for financial support of programmes and projects in the field of culture and arts, as part of the anti-crisis measures in the culture sector, with a larger share of the funds mainly directed to private cultural organisations and independent artists.

BGN 8,400,000 have been budgeted under the regular programmes of the National Culture Fund for 2022. Alongside this, funding is again provided for emergency programmes in connection with the emergency epidemic situation, namely the Creative Grants Programme amounting to BGN 7 million, the Programme for the Restoration and Development of Private Cultural Organisations - BGN 10 million, the Programme for the Restoration and Development of State and Municipal Cultural Institutes - BGN 5.5 million, the Programme for the Restoration and Development of Amateur Arts Organisations - BGN 5.5 million, etc.

Funding from alternative revenue sources represents, to the greatest extent, project-based applications to various funding institutions and programmes. Nationally, there has been increasing use of the various operational programmes.

Within the last two Programming Periods of the European Economic Area Financial Mechanism (2009-2014 and 2014-2021), the Ministry of Culture has operated two major operational programmes: the BG08 Programme "Cultural Heritage and Contemporary Arts" and the PA14 Programme "Cultural Entrepreneurship, Heritage and Cooperation" funded under the EEA Financial Mechanism. In the framework of its operation, Programme BG08 (2009-2014) has allocated funding of 14 000 000 EUR grant. Following the successful completion of this programme, the Ministry of Culture has prepared and negotiated a new Cultural

Entrepreneurship, Heritage and Cooperation Programme for EUR 10 000 000, with new areas of support, namely cultural entrepreneurship in cultural product/cultural institution management.

Bulgaria's participation in projects funded by the horizontal programmes of the European Commission - Creative Europe, Culture sub-programme, European Cooperation, Erasmus +, and UNESCO programmes - should also be noted.

Funding also comes from various donations and sponsorships, although to a relatively minor extent. That is where the possibilities of the Patronage Act, as well as the diligent work of the National Endowment Fund "13 Centuries Bulgaria", are to be deployed.

#### **2.2.7. Skills needed for CCS**

The demanding environment in which the creative labour force is called to respond and function presupposes that creative workers should be characterised by a large variety of skills. These skills vary from professional to digital and technical skills. There is a very interesting concept trying to describe this need. This concept is described by the term “T-shaped skills”. The vertical bar on the “T” represents the depth of related skills and expertise in a single field, while the horizontal bar represents the ability to collaborate across disciplines with experts in other areas and to apply knowledge in areas of expertise other than one’s own (Wikipedia). According to the Institute for the Future of Work, (2011), the ideal worker in the creative industries of the next decade is “T-shaped”. This means that they have a deep understanding of at least one field but have the capacity to converse in the language of a broader range of disciplines. This requires a sense of curiosity and a willingness to go on learning, far beyond the years of formal education. As extended lifespan promotes multiple careers and exposure to more industries and disciplines, it will be particularly important for workers to develop this “T-shaped” quality.

One categorisation of skills in the creative industries comes from a recent study of the Athens Chamber of Tradesmen (2015). These skills are based in the main factors that can truly accelerate the process of economic growth through creative economy (Athens Chamber of Tradesmen, 2015).

- Entrepreneurial and professional skills, such as innovative thinking, initiatives, cooperation, communication, marketing, problem solving, innovation, risk management etc.
- Digital skills, such as familiarity with new platforms and technologies, social media, work tools etc.
- Technical skills, new technical tools, new trends in the profession, etc.
- Intellectual property protection skills

- Soft skills, such as personal management, reliability, flexibility/adaptability, etc.

We should also present a recent study by NESTA (2017) that gathered data from job adverts in the UK from 2012-2016 for 30 creative occupations. The database contained thousands of job adverts and the researchers' grouped skills that contained in relevant job adverts into five key clusters.

The five key skill clusters are:

- Support skills
- Creating & design skills
- Tech skills
- Marketing skills
- Teaching skills

Finally, we will present the Skills Chart created within the Live Skills project, which aims to is to interpret, identify and document trends and skills needs in the areas of Arts Management, Digital and New Technologies and Cultural Entrepreneurship, for professions related to the Audiovisual (AV) and Live performances (LP) sub-sectors of the creative industries.

In Bulgaria, the skills listed below were identified as being in short supply despite there being a high market demand for professional competency in these areas.

Skills Gaps in Arts Management:

- project management
- arts financial management
- international and intercultural arts management
- self-management
- marketing and audience development

Skills Gaps in Digital and New Technology

- digital art and design skills
- social media and platforms
- digital marketing
- Intellectual property and piracy protection
- Sound and lighting equipment and controls

## Skills Gaps in Cultural Entrepreneurship

- idea generation and creativity
- new business models
- working with others
- planning and management skills
- negotiation skills

### 2.2.8. Digitalization in cultural and creative sector

The cultural and creative industries face a rapidly changing context, characterised above all by the speed of development and use of digital information and communication technologies (ICTs) globally. Technology and the availability of broadband infrastructure in urban and rural regions have opened new opportunities for artists to produce and distribute their work to a broader audience at a lower cost, regardless of physical and geographical constraints. ("The Green Book"). And while the process of digitisation had begun to unfold, the COVID-19 pandemic brought the need for global digital capability in the cultural and creative sectors to the fore even more. The lockdown broke new digital ground for cultural organisations in the region, with artists and cultural organisations faced with decisions about how to connect with audiences and adapt to the new changing circumstances in a creative and sustainable way, adapting business models, ways of working and how they engage and work with their audiences.

In Bulgaria, the digitalisation process is at different levels for different sectors, but overall, it is poorly developed. Various projects are under development and implementation at the local and national level, aiming at the digitalisation of Bulgarian cultural and historical heritage, as well as the adoption of new technologies and the acceleration of the digitalisation process in the cultural and creative sectors.

On 20 July 2021, the caretaker government of Bulgaria published the National Recovery and Sustainability Plan covering the period 2021-2026 for consultation. The first investment aims to build an inclusive, internationally competitive and sustainable ecosystem for the cultural and creative industries in Bulgaria, with a total planned resource of BGN 96.8 million. The second investment aims to digitalise museum, library, audio-visual and archive collections with a total planned aid of BGN 67.5 million.

### 2.2.9. Government policy

According to the established structure in the country, the state cultural policy in Bulgaria is realised on two levels - national and local. At the national level, responsibility for developing and



implementing cultural policy is divided between the legislative body, the National Assembly, and the executive body, the Council of Ministers. At the local level, cultural policy is implemented by local self-governing bodies - municipalities. The Ministry of Culture is the supreme central executive body in the field of culture with the right of legislative initiative, and it is empowered to formulate and implement the basic principles of state cultural policy and allocate funds from the state budget. Other funding allocation instruments are the National Culture Fund under the Ministry of Culture and the Municipal Culture Funds at the local level. In addition, artists themselves and NGOs working in the field of culture also emerge as direct and active participants in the cultural policy-making process.

The main priorities of Bulgaria's cultural policy are aimed at:

- Preservation of cultural memory and historical heritage,
- Creating conditions for the development and enrichment of all cultural areas as factors for sustainable development,
- Seeking an effective funding mechanism from the state and municipal budgets, as well as attracting alternative sources and forms,
- Improvement of the existing normative base in the field of culture,
- Digitisation of cultural content,
- Creating an environment that promotes and protects cultural diversity and creativity.

The main elements of Bulgaria's national cultural policy can be found in the Law for the Protection and Development of Culture, enacted in 1999. Alongside it, a number of other important legal acts are in force in Bulgaria: the Law on Creative Funds, which regulates the mechanism of financing activities in the field of culture; the Law on the National Endowment Fund "13 Centuries of Bulgaria", which strives to establish rules and mechanisms to support endowment activities; the Law on Patronage, which enshrines the principle of encouraging endowment, patronage and sponsorship in the field of culture; the Bulgarian Cultural Heritage Act; the Copyright Act and others. Several years ago, a draft proposal for a National Strategy for the Development of Bulgarian Culture was made, which unfortunately was not adopted by the National Assembly and therefore the basic principles enshrined in the national cultural policy are hardly linked to a strategic vision and goals, as well as concrete steps to achieve them.

## **2.3. Cyprus**

### **2.3.1. Cultural and creative industries**

Cyprus has a rich historical and cultural tradition, dating as far back as the earliest Prehistory and through the Bronze Ages (Knapp, 2013). Multiple civilizations, ranging from the Phoenicians,

Assyrians to the Hellenistic Dynasties, Roman and Byzantium Empires, as well as French Lusignan, Venetians (Hurlburt, 2021) and Ottomans (Hadjikyriakos , 2009) influenced the manifestation of the artistic representation of culture in Cyprus. Through a variety of processes of assimilation, exploration, adaptation, innovation and transference of artistic practices, new technologies and styles of symbolic representation, Cypriot culture stands today as an amalgamation of multi-ethnic and cross-cultural art.

The 1974 Turkish invasion alongside the preceding socio-political complexities and disturbances caused by the political upheaval of the two main religious communities on the island, had a dire effect on all sections of socio-political life in Cyprus. This impacted the way in which Culture is dealt with. After the withdrawal of the Turkish Cypriot ministers and the public servants in 1963, the functioning of the Greek Communal Assembly was suspended, and the Ministry of Education of the Republic of Cyprus was formed under Law 12 of 1965; being renamed in 1992 as the Ministry of Education and Culture (Theodoulou-Charalambous, 2014). However, the preceding socio-political warns against the reformation governmental institutions in an attempt to avoid any insinuations of a breach in the Constitution. Such an event could possibly instigate further upheaval. Although governmental governance structures have remained to an extend static, some attempts are in place to restructure the cultural governance to effectively meet the socio-economic challenges of the 21st Century (Theodoulou-Charalambous, 2014, p. 3).

Cultural policy and the responsibility for cultural heritage preservation lies primarily to the Ministry of Education and Culture (Ministry of Education, 2022) for the promotion of contemporary cultural expression in traditional and folk art. In addition, the Ministry of Communications and Public Works through the Department of Antiquities (2022) is responsible for the works of ancient, medieval and Byzantine civilizations, as well as, the culture created during the Ottoman rule, the management and operation of the Archaeological Museums, local and district museums, excavations, restoration projects and the promotion of Cypriot monumental architecture at large. The Department of Cultural Services (Cultural Services, 2022) is the main promoter of the state's cultural policy in relation to contemporary arts and plays a crucial part in shaping the cultural image of the state. The department, through several programs in the arts sector's, attempts to support and promote the Cypriot CCS. For example, the department is responsible for the coordination of Cyprus' participation in official international contemporary and visual art events. Other programs and areas of interest range from the works of the State Gallery of Cypriot and Contemporary Art, music, theatre and dance events, programs for the development of Cyprus Cinema and other festivals such as "KYPRIA" (Cyprus International Festival, 2022). However, the lack of an integrated policy for the development of the cultural industries sectors severely hampers the industries' progression, artists' livelihood and the sustainable development and longevity of the field.

### **2.3.2. Definitions and concepts**

The European Union refrains from the imposition of strict and restrictive definitions of what encompasses culture, in order to foster unrestricted opportunities and a sense of responsiveness towards local, national, and individual sensibilities (European Commission , 2022) . Nevertheless, the Creative Europe Program, the only European Union program with the sole aim of supporting and defending culture, adopts an open-ended legal definition. According to Article 2 (Schultz & Leskevicius, 2013) of the establishment of the Creative Europe program (2014 to 2020), “cultural and creative sectors mean all sectors whose activities are based on cultural values and/or artistic and other creative expressions, whether those activities are market or non-market orientated, whatever the type of structure that carries them out and irrespective of how that structure is financed.’ In this context, the development, production, dissemination, and preservation of outputs produced, as well as educational provision and management activities are all related functions of what signifies ‘culture and creativity’. The cultural and creative sectors are inclusive of “architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio, and visual arts”.

### **2.3.3. Education and employment in cultural and creative sector**

Only 3.5% of the total population in employment were employed in the cultural sector in 2017 (Compendium of Cultural Policies and Trends , 2021). 31% of which is self -employed in cultural employment, a percentage significantly higher than the 12% of self-employment in total employment (Compendium of Cultural Policies and Trends , 2021). In comparison with the rest of the 27 European Countries, the percentage of creative art workers in Cyprus is significantly low (Eurostat, 2022). These figures can be indicative of a deep-seated aversion by the public in gaining full employment in the creative sector. The absence of structured support and the meaningful creation of updated educational programs enhancing the skills needed by those individuals in the creative industries, as well as, the absence of the development of an educational ethos valuing creativity and creation, have a marked generational impact on the progression of the field.

Nevertheless, Arts Education is manifested in Cyprus in a variety of ways, all of which target the promotion and development of the CCS. The different forms of arts education range from artistic training in primary and secondary education, Higher arts education, out of school’s art and cultural education, as well as vocational and professional training. Some examples are the Museum Education programs and the establishment of two Music Schools that enhance the teaching of traditional and Byzantine music and support young people wishing to pursue a music career (Compendium of Cultural Policies and Trends , 2021).

The Higher Education System in Cyprus, although still at its infancy, aims to facilitate the connection between education and industry by aligning the curriculum to societal needs. For example, the Open University in 2014 (Open University, Cyprus ) initiated the first MA program in Cultural Policy and Development in Cyprus. Other institutions include the Cyprus Academy of Arts (University for the Creative Arts , 2022). The European University, Cyprus, in association with European partners created the EU Funded [4ArtPreneur](#) project providing online entrepreneurship courses for CCI workers in orders to facilitate career progression, sustainability and longevity (4ArtPreneur, 2021). This is an effort that will positively affect not just the career progression of individual graduates but the development of the cultural field in terms of talent acquisition, growth and its industrious ability.

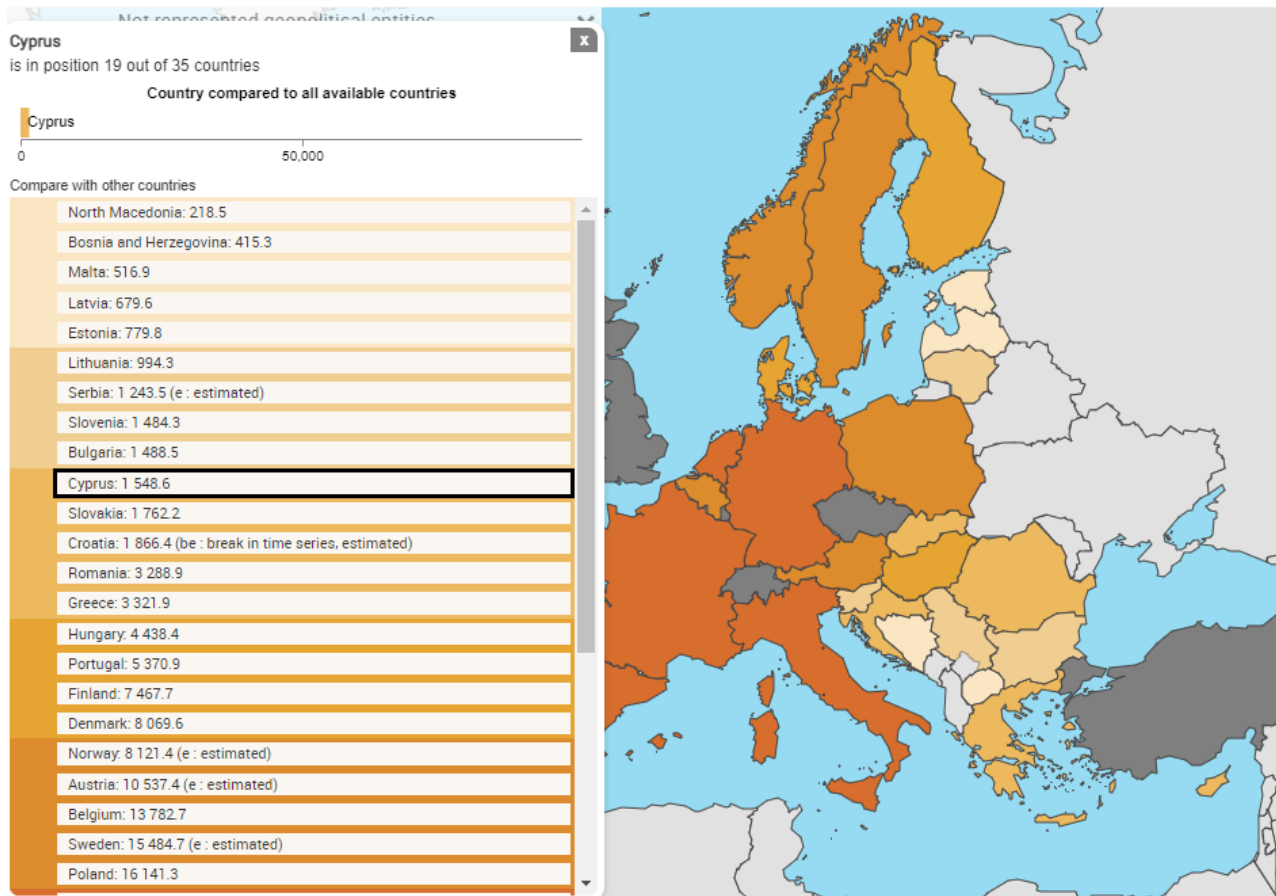
#### **2.3.4. Cultural creative sector in economic growth**

Regrettably statistical information on the cultural and creative industries in Cyprus is sparse and regularly unreliable. For example, although the EU's Cultural and Creative Cities Monitor includes cities in Cyprus in its performance map, as European Capitals of culture and cities regularly hosting two international cultural festivals, no quantitative data is outlined exploring the dimensions of cultural vibrancy, creative economy, and an enabling environment (European Commission , 2022). This on its own is indicative of a much-needed re-evaluation of the significance of culture as business and facilitator of economic growth. A business that is quantifiable and merits strategies of economic growth and sustainability.

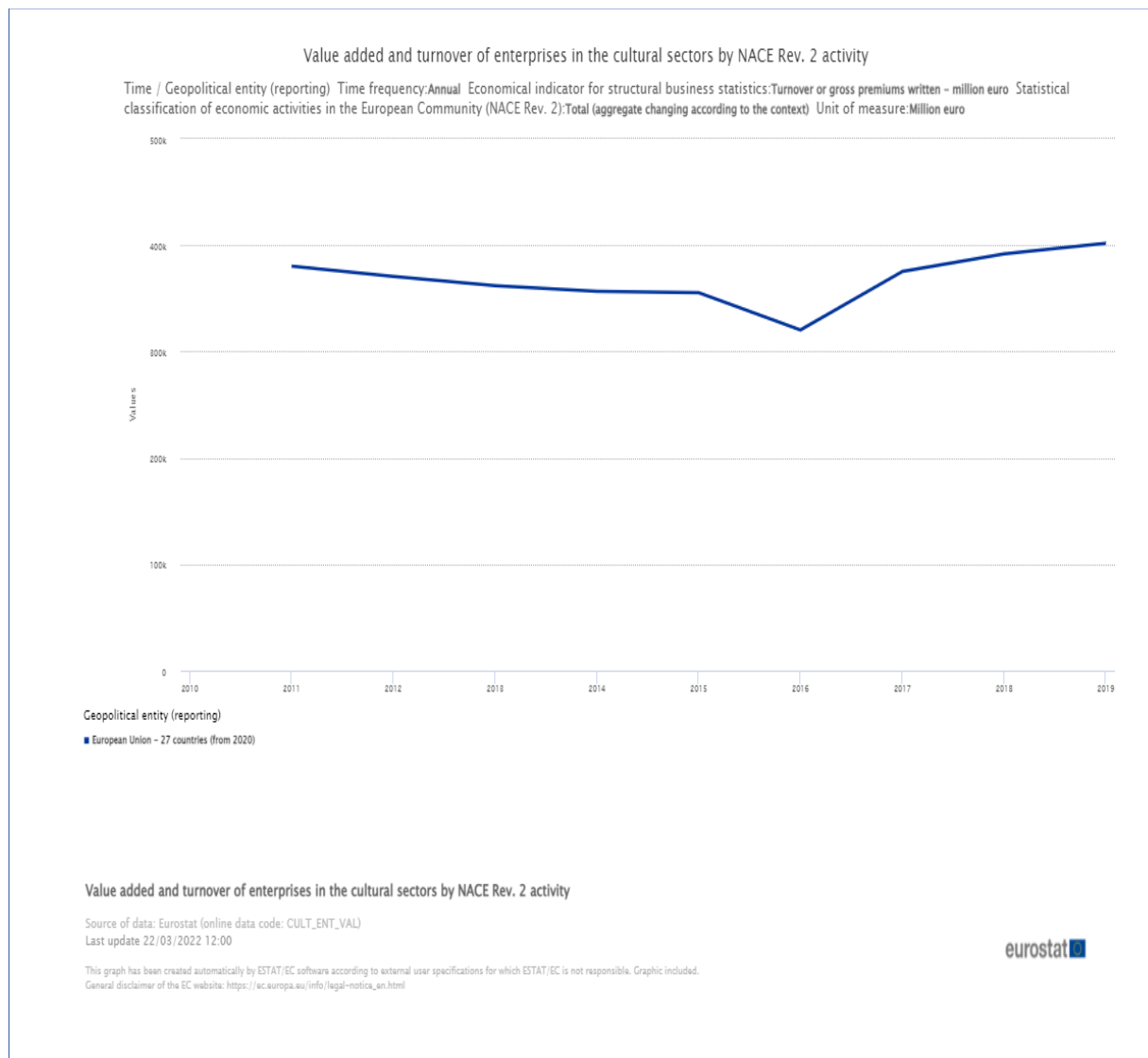
Those quantitative reports that were available in Eurostat have been identified and therefore outlined below. However, Eurostat (2022) marked those results as “estimated” or of “low reliability” and therefore care should be taken when extrapolating information from the latter. In 2016 there was an estimated 2237 cultural enterprises and businesses in Cyprus (Eurostat, 2022). The annual turnover in Cyprus in 2019 has been estimated to amount to 1548, witnessing an increase from 2015 at 819.9 (Eurostat, 2022).

The economic and social significance of the creative sectors has gained appreciation. However, the lack of reliable internationally comparable statistical information relegates the discussion about the creative industries in policy related forums for economic strategies of growth and prosperity, as an issue of lower value and priority (OECD, 2021). By 2019 the CCI have been growing steadily and in fact outpacing other growth generally in many EU countries. For example, there was over 11% increase in cultural employment between 2011 and 2019, whereas total employment was only at a 5.8% increase (Eurostat, 2022). Furthermore, the household consumption on recreation and culture increased by 20% between 2011 and 2019 in G20 countries. In contrast the final household consumption increased by 10% between 2011 – 2019 (OECD, 2021). The annual turnover of culture enterprises in 2019 of the 27 European Union

countries amounted to 401 668.4 million euros, thus witnessing a steady growth after 2017 and a sharp increase following the 2016 drastic decrease at 320 253.6 million euros (Eurostat, 2022). What is evidenced is the potential of the cultural and creative industries to be facilitators of economic growth, provide employment opportunities and create higher socio-economic mobility routes.



**Figure 1.** The annual turnover in Cyprus in the creative industries in 2019, a map provided by [Eurostat Data Browser](#) .



**Figure 2.** The value added and turnover of enterprises in the cultural sectors in the 27 EU countries, a graph provided by Eurostat Data Browser

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### **2.3.5. Covid-19 pandemic impact on cultural and creative sector**

The Covid-19 pandemic has affected and negatively impacted many economies, societies, and political systems worldwide. The assessment of the impact of COVID-19 on the Cultural and Creative Sectors in the EU's partner countries, indicated that the pandemic created unprecedented challenges and severely impacted the livelihood of the sector (Isernia & Lamonica, 2021). In fact, according to UNESCO (2021), 'the longer the recovery of artistic activities is delayed, the more lastingly they will be affected'. The restrictions on physical proximity and movement, the full lockdown measures and the complete closure of culture facilities all lead to the loss of jobs and income. Across the six cultural domains, the Design and Creative Services was the domain that experienced comparatively the least significant disruption (UNESCO, 2021, p. 15). However, the challenges faced are profound and long-lasting.

### **2.3.6. Challenges/Opportunities in CCS**

As stated earlier the absence of any data on Cyprus' CCI sector and its actual manifestation in its' cities disables researchers and policy makers in evaluating the challenges faced by professionals and the opportunities that they can offer and make use of. Any official information on the dimension of cultural vibrancy, the extend of the creative economy and the existence or lack thereof of an enabling environment that can aid creative expression and industrious growth, would have enabled discussion and the creation of strategies for development. Of interest would be an exploration into the actual lived experiences of CCI professionals in Cyprus, looking into the challenges they faced, and their assessment of the opportunities offered.

### **2.3.7. Skills needed for CCS**

An essential precondition for cultural entrepreneurs to thrive financially in the cultural industries of the 21<sup>st</sup> century, is the continues manifestation of new ideas in new projects and productions. Such growth and expansion are depended on the intrinsic tensions of continuous innovation. Storem, et.al. (2020) research article on the tensions faced by cultural entrepreneurs when dealing with continuous innovation, outlines those managerial, entrepreneurial, innovation and network related challenges that can positively or negatively impact creative growth and sustainability.

- Managerial skills: the ability to plan according to the work at task, manage own workload and effectively execute multiple tasks.
- Financial and Economic Literacy: is an important pre-requisite of economic growth in the CCI. It is the ability to adequately evaluate resources and outputs, market needs and value and ensure financial sustainability.
- Risk-assessment management and initiative taking: the ability to correctly evaluate and recognize opportunities at hand, as well as the ability to take initiative
- Creativity: perhaps the most important skill needed by CCS employees, as it is the skill responsible for continues development and creation of exciting and new ideas.
- Vision: the ability to draw inspiration and create strategic decisions on audience engagement for the manifestation of own ideas and creations.
- Communication of ideas: the ability to communicate with diverse audiences, establish connections and disseminate ideas coherently and relatedly. This skill is especially important in the era of digitization, given the diversity of audience and target groups available, for marketing and engagement.
- Adaptability and Resilience: the ability to adapt to changing circumstances and any externally controlled forces and behaviors that could potentially negatively impact progression and livelihood, thus developing a sense of resilience in the face of adversity.
- Ethical and Sustainable thinking: an awareness of the 'self' as a construct of general societal values and in co-existence with the environment that surrounds it, in an attempt to make sustainable and ethical choices on both the work produced and the ideas disseminated in public forums.
- Network Development: the ability to build a supportive network of collaborators that could support and enhance, present and future endeavors, thus ensuring the longevity and prosperity of the individual and their micro and macro-community.

Digital Skills: the use of digital means, platforms and spaces to disseminate own work for the purposes of artistic promotion and where possible or needed the use of digital tools for the creation of new projects and pieces of work that correspond to the needs and demands of the market.

### 2.3.8. Digitalization in cultural and creative sector

Digital transformation processes are influencing the manner by which art is traded and consumed with many art organizations reconfiguring their business practices and strategies. These led to the democratization of art processes, the re-envisioning of audiences and target group with the ability to reach to consumers that would otherwise be excluded (Massi, et al., 2021, pp. 2-3). However, criticisms of the digital transformation in the art world include the added threat to



authenticity of originals and prototypes, as well as the sense of urgency by artists to re-envision themselves in a fast paced and digitized world requiring different sets of skills and abilities.

Cyprus ranked 21<sup>st</sup> among the 27 Member states in the 2021 edition of the Digital Economy and Society Index (DESI) (European Commission , 2021). An improvement in performance has been noted in almost all DESI dimensions, however in most cases individual scores are placed at below the EU average. This can be seen in the overall subpar digital presence of the Cypriot CC sector, with the digital presence of museums, artistic productions, monumental architecture and heritage sites, as well as, contemporary art works of Cypriot artists, in need of growth. This is a significant barrier to Cypriot artists and consumers in the context of digital transformation and consumption of art.

The Ministry of Education and Culture, in line with its efforts to promote the intellectual and artistic productions of Cyprus, has created the [Portal of Cultural Information](#) (Ministry of Education and Culture , 2022). This platform has been developed to not only host the national network of cultural information but to act as a communication hub for cooperation with the European Platform [Europeana](#) for the digitization of cultural heritage, as well as the Cultural Portals of all other countries of the EU. The target is the gradual incorporation of all the cultural information bodies of Cyprus creating a pan-Cyprian network representing Cyprus' culture internationally. The archive highlights artists' profiles, their creative works, critiques and articles written on the latter, and cover all areas of the Visual Arts, Cinematography, Music, Writing and Performing Arts. This is the first digital platform of its kind in Cyprus and therefore its existence and continuous development will offer networking and dissemination possibilities to Cypriot artists.

### **2.3.9. Government policy**

Cherbo and Wyszomirski (2000, pp. 14-18) identified those public and private policies and practices that directly or indirectly enhance the development of artists and artistic activity as the “creative infrastructure”. As such in an ideal scenario the artist is surrounded and supported by an infrastructure of support with resources readily available for individual growth, development, and creativity (Wyszomirski, 2004). In the case of Cyprus only 0.7% (Eurostat, 2022) in 2017 of the total Cypriot governmental expenditure was afforded to the cultural and creative industries. However, as a response to the COVID-19 crisis, the Cypriot Government in addition to the introduction of general measures in support of the labor force, introduced emergency measures providing financial support to artists and institutions to compensate for damages caused by cancellation of events and activities (Compendium of Cultural Policies and Trends , 2021). Similarly, existing programs in support of the industry were readjusted providing further funds and adding a level of flexibility in the administrative reporting of currently operating programs.

#### New Measures:

- Emergency grants at 900 EUR for professionals of the creative and cultural sector.
- An increase of 50% of the amount provided for the purchase of Art Works for the State Collection.
- Support and enhance in the screening of European and Cypriot film productions.
- Support offered to cultural entities by financing their operating expenses in order to sustain their viability.

#### Readjustment of existing programs:

- *Subsidy program*
  - Flexibility and adjustments regarding funding expenditure, administration, reporting in current program.
  - Funding for online presentation of an already approved activity.
- Partial prepayment of planned activities which will be implemented until the first semester of 2021.
- *Financial and institutional support*
  - Continuation of financial and institutional support of the operation and support of institutions that offer cultural program to the public, namely cultural centers and theatres.
- *Film production*
  - Regarding the funding of filmmakers (for films that were already granted government funding), more flexibility will be allowed on formal requirements of grant program.
  - Extension of all ongoing movie productions that have been signed with the Ministry of Education, Culture, Sports and Youth.
  - Regarding film productions that were either in the process of filming or had prepared for filming for the months of March to June 2020 and were forced to halt production:
    - A grant of a percentage of the total amount of confirmed losses due to the pandemic.

The Ministry is also in close cooperation with the Cyprus Theatre Organization to support the professionals and producers in the field of theatre.

## 2.4. Greece

### 2.4.1. Cultural and creative industries

Finds from the prehistoric and archaic period, unique works of classical antiquity, Hellenistic, medieval and Byzantine monuments, creations of popular culture, traces of the passage of other cultures and different religions coexist with today's creations, constructions and modern works of art. Greece owns a cultural heritage which is attempting to preserve, foster and improve. Recording data for CCS was extremely limited and fragmentary as no official recording of the development dimension of culture and creativity had ever been attempted in a way that is in line with international practices. Ministry of Culture and Sports assumed this recording, so that Greece, both at national and regional level, can now have a clear picture of this sector and its contribution to the economy, employment and society in general. This inventory has assisted not only on highlighting the development potential of culture and creativity, but also in designing policies that will strengthen the relevant sectors even further through targeted actions.

According to the Ministry of Culture and Athletics, several activities are organized and implemented in order to strengthen the cultural and creative sector. Activities for cultural heritage include excavations, restorations, artistic events, publications, exhibitions, archaeological conservation, educational programs and infrastructure projects. Equal importance is the encouragement and development of modern culture, so actions are conducted such as events and festivals, exhibitions of painting, sculpture, ceramics and other, state awards, major projects such as The Restoration Project on the Acropolis and other projects which include research.

The state of the art in Greece is omnipresent. Foreign and Greek artists of international fame and global visibility present their work in unique, historic, aesthetically unsurpassed, mystifying spaces. Ancient theatres, specially designed spaces for performances, industrial spaces that have been renovated, old warehouses, squares, pedestrian streets and the traditional villages of Greece. Everything is transformed into a vast pluralistic and challenging setting, where you will have the opportunity to get in touch with contemporary Greek art.

### 2.4.2. Definitions and concepts

Cultural industries, as a term introduced in the early twentieth century, originally appeared by Max Horkheimer and Theodor W. Adorno in the book "Dialectics of Enlightenment", 1947 Amsterdam. In the 1990s and 2000s definition of cultural and creative sectors came to prominence as both an academic and a policy issue.

According to UNESCO, "cultural industries are industries that produce and distribute cultural goods or services". These goods according to their use or purpose of production embody or transmit cultural expressions, regardless of the commercial value they may have. Cultural goods may be final and/or intermediate goods. Cultural goods include cultural heritage, printed matter and literature, music and the performing arts, audiovisual media, socio-cultural activities, sports and tourism.

European Union provides an open-ended definition of cultural and creative sectors, permitting each Member State and individual to define the sector. As an overall not strict and restrictive definition, EE distinguishes activities included values and/or artistic and other creative expressions either aiming to enter into labor market either not. In particular, cultural and creative industries includes activities which referring to architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts. In order to support and disseminate these activities, European Commission had developed 2007 European Agenda for Culture and following this; a new framework developed and in 2018 a New European Agenda for Culture had been adopted.

#### **2.4.3. Education and employment in cultural and creative sector**

According to research which conducted in order to improve and develop creativity in higher education, reports that statistically, while young children have a high creativity index of 98%, the same individuals as adults will develop a creativity index of only 2%. Based on the above research, the idea of creativity as an endowment is refuted and the mismanagement of creativity in the early years of children's development is highlighted, particularly by the education system, which not only does not promote creativity but also destroys it by teaching young people to follow instructions rather than to create and innovate.

Education in culture and creative sector in Greece starts from the secondary level (high school, etc.). Art Schools and Music High Schools are public schools of secondary general education with an extended program and an emphasis on Arts which provide customized curriculum on visual arts, theatre – cinema and dance, rhythm, acoustic ability, sound color discrimination and learning a musical instrument.

Regarding further education in culture and creative sector, Greece provides vocational courses offered by private educational institutions, as university and higher education level courses and art workshops/seminars.

In 2014, 57% of the country's cultural and creative sector workers were higher education graduates. This percentage increased by 23.7% (EU-28: 40%), while the number of primary educations decreased by 73% (EU-28: -24%), which highlights the increasing of the growing professionalization of the wider field of creative work and possibly the extent to which it is becoming as an attractive field of work to a highly educated workforce.

#### **2.4.4. Cultural creative sector in economic growth**

In order for Greece to obtain, both at national and regional level, with a clear and comprehensive picture of the specific sectors and to reflect their contribution to the economy, employment and, more broadly, to society, raised the need to record the development dimension of the cultural and creative sector. The overall picture of the cultural and creative industries in Greece shows that despite the huge declines they have suffered since 2008, in 2014 they are showing signs of recovery for the first time in six years. Greece ranks 11th in employment and 10th in the number of creative businesses in the EU-28.

The official mapping of the Cultural and Creative Sector in Greece recorded that in 2014, the cultural and creative sector in Greece employed 110,688 people in 46,370 enterprises, which sold symbolic goods and services worth €5.3 billion, with a value added to the Greek economy of around €2.1 billion, contributing 1.4% of GDP. The sectors with the largest contribution to value added are publishing (€371 million), software publishing and computer programming (€297 million), audiovisual (€208 million) and television, radio and communication (€203 million). Software sectors increased their value added by 16.8% and their number of employees by 0.5% while design sectors increased their value added by 27.9% and their number of employees by 0.2%. Other sectors that showed large increases in value added are audiovisual (54.8%), libraries and museums (16.8%) and television, radio and communication (15.7%). The number of employees in the cultural and creative sector in Greece was 110,688 in 2014, i.e. about 3.2% of total employment in Greece, which showed a slight increase of 0.4%. In contrast, large decreases in the number of employees in the period 2008-2014 are observed in television and radio (-53%), libraries and museums (-43.6%) and publishing (-39.2%), although these sectors show the largest increases in the number of employees in 2013/2014 (15.2%, 15.4% and 1.3% respectively). The sectors with the most employees in 2014 are architecture (21.200 employees), publishing (16.200), advertising (11.300) and arts and entertainment (11.200).

A more recently survey indicates that the main activities of Cultural and Creative Industries (CCIs) accounted for 4.4% of European GDP, with a turnover of €643 billion and a total value added of €253 billion in 2019. The figures show that the economic contribution of IPIs is greater than that of telecommunications, high-tech, pharmaceuticals or automotive jobs - as radiated by Eurostat's Business Sector Profile and the analysis by Ernst & Young - in the Cultural and Creative Industries

reach 7.6 million, in tourism, telecommunications 0.9 million, utilities 1.3 million and automotive 2.6 million.



**Figure 3.** Facts and figures in terms of economic growth in Greece.

Source: <https://news.gtp.gr/>

#### 2.4.5. Covid-19 pandemic impact on cultural and creative sector

The COVID-19 pandemic had a sudden and significant impact on the arts and cultural heritage sector (galleries, libraries, archival collections and museums). The global health crisis, as well as the uncertainty resulting from it, affected both the functioning of these organizations and their dependents (employees and partners) in all sectors. By March 2020, around the world, most cultural institutions had closed indefinitely (or suffered a significant reduction in services), while exhibitions, events and performances were cancelled or postponed most institutions around the world have suspended their operations either voluntarily or by government mandate.

In 2020 the Cultural and Creative Industries lost around 31% of its revenues. The total turnover of the CCIs in the EU-28 decreased to €444 billion in 2020, a net decrease of €199 billion from 2019. With a 31% loss of net revenue, the cultural and creative economy is one of the hardest hits in Europe, less affected by air transport but more affected by tourism and automotive (-27% and -25% respectively). The impact of COVID-19 was felt across all sectors. In more detail, the performing arts (-90% between 2019 and 2020), the music industry (-76%) which defines them as the most affected sectors. Visual arts, architecture, advertising, books, press and audiovisual activities decreased by 20%, to 40%, compared to 2019.

#### 2.4.6. Challenges/Opportunities in CCS

The Department of Journalism & Media of the Aristotle University of Thessaloniki has conducted a survey through questionnaires in which 17 possible problems and difficulties faced by visual artists in their field are included. These are issues that emerged from preliminary research and exploratory study. The most important among them were the tax regime, limited access to funding, the feeling of insecurity in artistic work and insufficient support from the state. These

findings are consistent with the responses to the questions regarding the degree of satisfaction with different dimensions of artistic work (financial remuneration, insurance, opportunities for promotion and promotion, funding, etc.). On corresponding questions, overwhelmingly high percentages (over 80%-90%) indicate high levels of dissatisfaction, while 66% also indicate very low levels of optimism about the future of the visual arts in Greece.

Challenge for CCS is that the audience in the labor market is limited and consequently only a quarter of employees in the cultural and creative sector earn a living from their artistic work, while only 47.4 % of them are engaged in other professional activities and 46,5 % work in the field of artistic education. The art market relies mainly on private individuals and much less on organizations, companies, institutions or public bodies. It is also worth noting that only 9% of respondents said that their works had also been purchased by museums. Also, the working conditions of people involved in painting, sculpture, music and theatre are not conducive as more than 60% of visual artists work uninsured as artists.

Between 75% and 91% of visual artists in Greece is currently facing severe economic shortage, while one third living in conditions of material deprivation, so 60% of them would consider emigration as the only solution. According to the above, opportunities in the cultural and creative sector are few and restricted to poor subsidies

#### **2.4.7. Skills needed for CCS**

Following skills are identified for the CCS in Greece:

- Spotting opportunities: CCS employees should recognize, size and shape opportunities in order to respond to challenges and generate values.
- Creativity: Creativity in CCS is major importance as ideas can be transformed into solutions and directly linked to improvement.
- Vision: Vision is a source of inspiration which assist on strategic decision-making, audience engagement and building of a desirable future.
- Ethical and sustainable thinking: This skill refers to awareness of choices and behaviors impact, both within the community and the environment.
- Motivation and perseverance: This is the ability of staying focus on the target and overcoming of the setbacks.
- Financial and economic literacy: Financial literacy assists on budget management, utilization of funding and planning of financial sustainability.
- Taking the initiative: CCS initiative led to value-creating activities, problem solving, appropriate use of opportunities.

- Planning and management: Competence of plan and management identifies the priorities and milestones to achieve setting goals, assists on time control and defines the guidelines.
- Coping with uncertainty, ambiguity and risk: CCS employees should be able to aware of existing risks and take the responsibility of them, recognize the effects of emotional intelligence on individuals and groups, support diversity and outline its benefits and be willing to build a team, establish new networks and collaborate with them.
- Team building: Being part of a team assist on understanding the importance of diversity in the process of idea generation and implementation, the principles of working in a group and the process of active listening.

#### **2.4.8. Digitalization in cultural and creative sector**

Digital transformation in the cultural and creative sector means simplification of services/businesses but also skills upgrading, including new technology-related skills, familiarizing with robotics and artificial intelligence and designing applications in arts, with revenue-generating art platforms, organization or business. The lack of digital skills, both at basic and higher level, remains a major obstacle for Greece in the context of digital transformation. More specifically, according to a survey, the key skills to be developed are those related to social media, digital marketing and software development technologies, as well as skills related to digital art and general design knowledge.

Greece ranks in a low level in international indicators that assess the digital maturity of countries around the world. For example, in the Digital Economy and Society Index (DESI) the country ranks 27th among the 28 EU countries for 2020. However, an increase has been observed as many artists choose digital media to promote and increase their work. Some of these activities were online concerts, digital navigation in exhibitions and museums, live streaming events, literary and cultural podcasts.

The digitization of the cultural and creative sector has both positive and negative effects. The positive effects are linked to the easy and widespread dissemination and to interactivity. Spread of technology renders digital media intimate and easily accessible which illustrates their influence on users. However, the use of these technologies requires the development of digital skills and particularly information and data literacy, digital communication and collaboration, digital content creation, awareness of digital security and problem solving.

#### **2.4.9. Government policy**



Following the pandemic and intense protests by employees in the cultural and creative sector, the government adopts a new policy to support the sector. The Ministry of Culture and Sport is allocating €15 million to the Contemporary Culture sector and also creators and professionals in order to stimulate and strengthen the resilience of contemporary culture and its creators through a comprehensive Development Measures and New Actions Plan.

The first phase of the Development Measures and New Actions Plan includes the following:

- A dedicated call, which has already been activated, for the development and funding of Digital Culture actions, with a twofold objective: On the one hand, to stimulate the market and strengthen the related professions and, on the other hand, to create a digital cultural product that can be made readily available.
- Special call for the development of (a) short films and (b) documentaries. The management of the calls and the procedure will be carried out by the Hellenic Film Centre with the allocation of the appropriate resources by the Ministry of Culture and Sport.
- Strengthening regional cultural policy and local cultural operators and creators.
- Supporting and enhancement of theatre productions in the independent theatre, especially small theatres. The primary objective is to support artists and theatre professionals.
- A dedicated call from the Ministry of Culture and Sports in the field of design, in all its facets, aiming to enhance the extroversion and promotion of Greek design and to support creators.
- A dedicated call from the Ministry of Culture and Development in the field of animation not only to support creators, but also for the extroversion and promotion of Greek animation to the international market.
- A dedicated call from the Ministry of Culture and Sports to creators of visual arts to submit proposals, with a two- or three-year horizon, with the aim of supporting research, implementation and extroversion of contemporary Greek artistic production, as well as the support and promotion of new creators.

Strengthening online literacy activities with the dual aim of supporting authors and actors-readers, but also the creation of digital material readily available.

## **2.5. Ireland**

### **2.5.1. Cultural and creative industries**

The creative industries, which can be defined as industries and occupations which focus on creativity as a means to deliver commercial success, export growth and resilient employment for Ireland including: – advertising and marketing – architecture – crafts – design\* – fashion – film, TV, video, radio and photography – IT, software and computer services – publishing – museums, galleries and libraries – music, performing and visual arts. Areas of design include exhibition / performance / games / graphic / industrial / interior / landscape / product / textiles

Cultural heritage, including: – Heritage as considered in the Heritage Act 1995 and the National Heritage Plan 2002 – Museums, archives and public cultural institutions – Library services and integrated cultural services delivered by local authorities – Built and natural heritage, including architecture, archaeology, biodiversity and landscapes – Intangible (or ‘living’) cultural heritage, including the Irish language, sport, customs and traditions – Cultural diversity and languages which have become part of Irish life in more recent years The Creative Ireland Program defines creativity as a set of innate abilities and learned skills: the capacity of individuals and organizations to transcend accepted ideas and norms and by drawing on imagination to create new ideas that bring additional value to human activity. Culture and creativity are inextricably linked: artists, designers and creative practitioners across a range of disciplines are central to the evolution of a culture of creativity. These definitions are intended as working and inclusive definitions rather than exclusive or fixed ones, recognizing that culture and creativity are by their nature fluid and evolving.

### **2.5.2. Definitions and concepts**

Culture is fundamental to human experience and to our nature as a species. It is abiding and ever-changing, universal and particular. For that reason, there are many definitions of culture. In its broadest sense culture describes everything we do as a society and how we behave. However, for the purpose of Irish Culture 2025 policy framework a more circumscribed, but still wide-ranging, definition of culture is appropriate. It includes all of the following fields:

The arts, as defined in the Arts Act 2003, meaning ‘any creative or interpretive expression (whether traditional or contemporary) in whatever form, and including, in particular, visual arts, theatre, literature, music, dance, opera, film, circus and architecture and including any medium when used for those purposes.

### **2.5.3. Education and employment in cultural and creative sector**

The purpose of Irish education system is to equip children and young people to flourish in their personal and social lives as well as in the economic and social circumstances in which they are likely to find themselves. As we begin the third decade of the 21st Century it is evident that we

are living in an age with different challenges and requiring new solutions to those that served us before. It is essential that our education system is adapted to meet these challenges so that it fosters creativity, flexible thinking and resourcefulness in our young people.

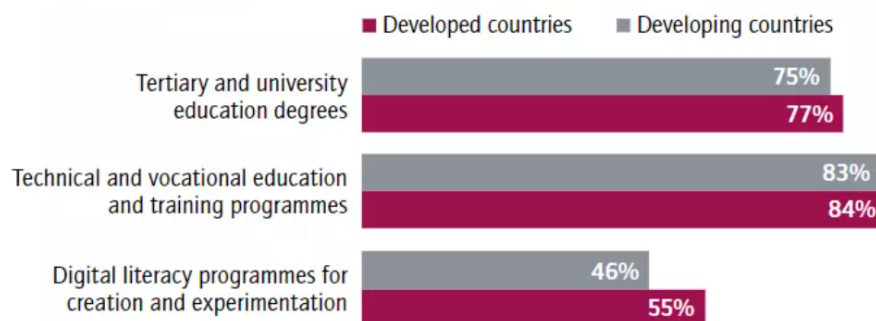
Increasing collaboration between the Departments of Culture and of Education has provided the foundation for the Creative Youth Plan, under Pillar One of the Creative Ireland Programme. That plan seeks to enable the creative potential of every child and young person. Underlying it is a firm conviction that creativity and culture should be at the heart of education for all our young people. The Creative Youth Plan underlines the importance of integrating the arts and creativity into education, not just as curriculum subjects but as resources for education and learning generally. The Plan is also committed to improving access to cultural and creative activities in the non-formal sector.

Deepening cultural engagement and promoting more creativity can broaden young people's minds and help them develop their talents for meeting future challenges. Cultural and creative education (inside and outside of school) can enable young people to explore and understand their own cultural assumptions and values, embrace cultural diversity, encourage an historical perspective, value heritage and understand the evolutionary nature of culture.

Engagement with the arts and creative practices are important for nurturing and developing creative skills and capacities. While knowledge and specialist expertise will continue to be important, what will be more important will be the ability to apply that knowledge and expertise in previously unimagined ways: to be creative and inventive, to identify problems and propose solutions, to work collaboratively and experimentally, to think conceptually and imaginatively.

While the creative sectors are disparate with differing objectives, common to all is a need to develop the commercialisation and internationalisation aspects considering the importance of maintaining and growing access of Irish products to international markets. The Western Development Commission (WDC) indicated a desire to see graduates of creative courses supplementing their qualifications with a course in entrepreneurialism so graduates can apply their qualifications to progress their artistic abilities into a product which can then be supplied to consumers both within and outside Ireland. "For the diversity of cultural expressions to thrive, culture, creativity and education must be seen as going hand in hand," the report says.

There is a mismatch between education, training and employment opportunities, it says, and calls for creative skills to be taught at as early an age as possible. In particular, it sees a need for more to be done on digital literacy.



Source: BOP Consulting (2021).

**Figure 4.** Specific education and training programs in the arts and the cultural and creative sectors by types, by developed/developing countries

Adapting to the digital environment is still a challenge for the cultural and creative sectors,” the report says, adding that future generations will need to be trained in these technologies to make progress. The report also highlights the importance of “non-formal learning”. It singles out Burkina Faso, where there is limited formal training in arts and culture, but civil society organizations regularly help artists and professionals develop their skills, with a view to helping them become professionals in their fields.

#### 2.5.4. Cultural creative sector in economic growth

On 10 January 2020, Culture Minister Josepha Madigan published Ireland’s first ever national cultural policy framework, Culture 2025 – A National Cultural Policy Framework to 2025. Culture 2025 sets an overarching vision and framework for Government policy across the cultural sector and is underpinned by a commitment to double the amount of public funding for arts and culture from 2017 levels (€288m) to €576m by 2025. Central to Culture 2025 is the recognition of the value of culture and creativity to the individual and society, the need to support creative practice and cultural participation and a commitment to Ireland’s cultural heritage.

The aims of Culture 2025 are already being progressed through current Government initiatives including the Creative Ireland Program, the 20-Year Strategy for the Irish Language, Global Ireland 2025, the National Biodiversity Action Plan and the Audiovisual Action Plan. Culture 2025 will ensure a unified approach to these cultural policies across Government and to planning and provision within the cultural sector.



**Figure 5.** Creative Ireland Data for 2021.

Source:

[https://report2021.creativeireland.gov.ie/4/?utm\\_source=CI&utm\\_medium=Button&utm\\_campaign=Rep2021](https://report2021.creativeireland.gov.ie/4/?utm_source=CI&utm_medium=Button&utm_campaign=Rep2021)

### 2.5.5. Covid-19 pandemic impact on cultural and creative sector

The current impact of COVID-19 is hard to quantify due to its rapidly evolving nature. However, the magnitude of the effect will be unparalleled, as shown by early indicators. According to the Arts Council, more than 2.4m audiences were impacted by COVID-19 in Ireland, with 91% of organizations reporting cancelled or postponed events since March 2020.

Covid-19 has caused major disruption to the entire labor market; however, some sectors have fared better than others. While hundreds of thousands of people were in receipt of wage supports such as Pandemic Unemployment Payment (PUP) and Employee Wage Subsidy Scheme (EWSS) for a significant portion of the year, total income tax receipts fell by just 1% in 2020. This can be attributed to the fact that the jobs which were impacted were primarily in lower paid sectors, including the Arts. EY estimates that approximately 57% of jobs in the arts sector were disrupted in 2020.

Cultural and creative industries (CCIs) played a crucial role in the European economy pre-Covid, employing 7.6 million people and generating €643bn across the 28 member states in 2019. While the CCIs encompass a broader range of sectors than are contained within the Arts Council remit in Ireland, it does provide an indication as to how the sector fared across many locations. EY estimates that CCIs have been the most adversely affected by Covid-19, each recording a 31% decline in turnover compared to 2019 levels. The chart below displays the change in turnover

among the subsectors of the CCIs. It would be beneficial to assess the weight and trends of each of these subsectors at an Irish level, in order to identify synergies and opportunities.

### 2.5.6. Challenges/Opportunities in CCS

Dublin: an example of the Irish creative city. According to the 'The Cultural and Creative Cities Monitor: 2017 Edition' (Joint Research Centre. European Commission, 2017), Dublin is the fifth (out of 34) most cultural and creative city in EU (in the group large cities with a population between 500,000 and 1 million inhabitants). It scored the first regarding "enabling environment", third in "cultural vibrancy", and tenth in "creative economy", according to the framework illustrated in Figure 6. This is an indication that there is a lot of room for improvement in reference to intellectual property and innovation, creation of new jobs in the creative sector and creative and knowledge-based jobs. Cork won the first place in cultural vibrancy irrespective of city size.



**Figure 6.** The Cultural and Creative Framework.

Source: From "The Cultural and Creative Cities Monitor: 2017 Edition", by Joint Research Centre (European Commission). 2017, p.15. Retrieved from <http://publications.jrc.ec.europa.eu/repository/bitstream/JRC107331/kj0218783enn.pdf>

Supporting culture and creativity in all its forms is essential to the future cultural, social and economic well-being of the country. The Creative Ireland Programme 2017-2022 recognizes the link between culture and creativity and aims to mainstream creativity in the life of the nation. The Government recognizes that arts, culture and creativity are fundamental to the public good

and that there is a need to increase access to and participation in the arts, to boost our creative industries and to preserve our heritage. The ambition is to double the amount of public funding for arts and culture from 2017 levels by 2025.

Creative Ireland is a five-year Programme which connects people, creativity and wellbeing. It is an all-of-government culture and wellbeing program that inspires and transforms people, places and communities through creativity. They are committed to the vision that every person in Ireland should have the opportunity to realize their full creative potential.

Established in 2017, Creative Ireland was born out of Ireland 2016, the hugely successful state initiative to mark the hundredth anniversary of the Easter Rising. The Programme drew inspiration from the extraordinary public response to the Centenary and the thousands of largely culture-based events exploring issues of identity, community, culture, heritage and citizenship.

Through partnerships with local and national government, cultural and enterprise agencies and local enterprise, Creative Ireland creates pathways and opportunities for people and communities to unlock their creative potential.

They believe in the power and creative potential of people, organizations and government departments working together, sharing expertise, to catalyze ideas and action. Through they focus and co-ordination to forge an eco-system of creativity. The Programme is built around key themes: Creative Youth, Creative Communities, Creative Places, Creative Nation

#### **2.5.7. Skills needed for CCS**

The Committee of HOUSES OF THE OIREACHTA recommends that a detailed skills assessment survey should be conducted by a relevant body incorporating creative economy stakeholders in order to appropriately and comprehensively identify the existing skill deficiencies in the creative sectors and identify the required training which may be provided at further / third-level education level in Ireland.

The importance of matching skills with demand for specific creative sectors is integral in the successful development of those sectors, particularly where skills shortages either arise or where stakeholders can identify a shortage is likely to arise based on certain high growth indigenous sectors, such as animation and games development. The Committee advocates forward planning as integral for this and the expansion of training initiatives merit detailed assessment in collaboration with creative businesses active in these sectors. The Committee recommends examination of the feasibility of developing a distinct model of training, specific to the creative economy, with a focus on structured specialist training initiatives rather than generalist degrees

as well as active targeting of school age and third-level age students. Connections with organisations like SkillNets should be actively utilised and explored.

The Committee recommends that, taking on board the results of the 2012 OECD PISA report on Creative Problem Solving<sup>41</sup>, the Government should examine ways to introduce enhanced creativity-based activities into the curriculum to set the conditions to promote the creative economy.

The Committee recommends that in building the economy, especially the creative economy, the Department of Jobs, Enterprise and Innovation should consider collecting data on employment outcomes to best match employees with the skills needs of employers. This process could potentially draw upon the Department of Social Protection's Activation program as an initial model and as a source of information.

#### *Building Ireland's Audiovisual Creative Economy*

The audiovisual content industry is dependent for its success on the quality of talent and skills available to it. The employment targets will depend on a significant increase in the numbers and quality of people available to the industry. The summarized recommendations of the report are:

- The IFB to take full responsibility for determining the essential creative and technical skills necessary to sustain growth and development,
- Develop Screen Training Ireland to ensure skills training is aligned with industry growth plan targets,
- Develop and plan for the existing and future skills needs of the industry and update the Forfás reports on 'Future Skills Needs',
- Develop 'on the job' training initiatives,
- Develop apprenticeships and graduate placements,
- Develop retraining opportunities from other sectors,
- Establish business mentoring and export focused program,
- Develop digital and media literacy programs for primary and post-primary education delivering the ambitions of '21st Century Schools',
- Establish an Industry and Education Forum to assist in rationalizing specific training and education at third level to eliminate duplication and waste,
- Introduce high-level international mentoring



### 2.5.8. Digitalization in cultural and creative sector

The digital age presents both opportunities and challenges for the cultural and creative sectors. Rapid developments in technology, new methods of communication and the internet have changed the way people create, access, and participate in culture. This is particularly true for young people. Technology has improved access to culture, and people can now have a much more interactive role in how they engage with culture.

This continuous revolution in the nature of cultural content and in the range of delivery platforms presents opportunities for Irish producers, but it also changes how cultural professionals attract and retain relevant audiences.

Public engagement and life-long learning can be enhanced through interactive multimedia cultural content. Advances in technology and broadband allow access to high-quality cultural material and innovative learning experiences. Digitization is a powerful means of presenting information about the activities and collections of cultural institutions to large and diverse audiences across the world.

There are opportunities to make our cultural wealth available to a wider audience through the digitization of collections, the development of new learning tools, and the development of online exhibitions and concerts. This will of course require continuous investment to ensure that the cultural sector remains at the cutting edge of digital developments. There is now an increasing appetite for free and fee-based digital cultural information. This, in turn, raises issues relating to copyright and intellectual property which will have to be addressed. The challenge is to provide consumers with greater access to cultural content while protecting the creative rights of the producers of that content. This is particularly challenging for the music industry in Ireland.

This is just one of a number of significant challenges presented by the advances in digital technology, including how we in Ireland can 'tell our story' to ourselves and to the wider world and how we can become a global hub for the production of film, TV drama and animation. Implementation of the Audiovisual Action Plan (2018) is critical to our success in meeting these identified challenges. The Government will support the audio-visual sector through financial and tax credit supports to ensure that the Irish story continues to be seen and heard, balance greater access with the protection of creative rights, enhance supports for musical creativity, support cultural institutions in the digitization and preservation of digital cultural content and develop a national digital preservation policy to bring policy coherence to this area.

According to Irish Humanities Alliance response to 'Culture 2025', it should endorse the preservation and development of traditional and established forms of cultural expression while

remaining open to new and as yet unimagined cultural forms that will emerge in the next decade. In relation to preservation, digitization is crucial to achieving the goal of preserving cultural heritage, and new technologies must be utilized; however, this work must be carried out by state archives, libraries and higher education institutions with the requisite controls, personnel and sustainability. Ireland cannot afford to become digitally invisible or underdeveloped in terms of its cultural heritage. Public policy and dedicated resources are needed to ensure that new technologies serve the best interests of the Irish public by opening up access to cultural heritage in new and exciting ways.

#### **2.5.9. Government policy**

On 10 January 2020, Culture Minister Josepha Madigan published Ireland's first ever national cultural policy framework, Culture 2025 – A National Cultural Policy Framework to 2025. Culture 2025 sets an overarching vision and framework for Government policy across the cultural sector and is underpinned by a commitment to double the amount of public funding for arts and culture from 2017 levels (€288m) to €576m by 2025. Central to Culture 2025 is the recognition of the value of culture and creativity to the individual and society, the need to support creative practice and cultural participation and a commitment to Ireland's cultural heritage. Culture 2025 is a Policy Framework that defines the scope and sets the direction for Government policy in the whole cultural field.

It sets out the current state of affairs in a broad range of categories across the cultural sector, the aspirations the Government has for those areas, and the Government's commitments to achieve those aspirations. Many of the aims of Culture 2025 will be achieved through more detailed policies and implementation plans in specific areas. The fundamental purpose of Culture 2025 is to ensure a unified and coherent approach to cultural policy across government and to planning and provision across the cultural sector. The Government's Creative Ireland Programme 2017-2022 will continue to be the primary implementation framework for the promotion and strengthening of culture and creativity throughout Ireland. Commitments to improve funding structures for the arts and heritage sectors will be upheld through the implementation of Investing in Our Culture, Language and Heritage 2018-2027. Irish culture will be supported at home according to the plans set out in Project Ireland 2040, as well as Pillar 5 of the Creative Ireland Programme. Irish culture will be promoted worldwide in line with the plans set out in Global Ireland 2025. Goals for the Irish language will be achieved through the *Straitéis 20 Bliain don Ghaeilge* 2010- 2030. Ireland's National Heritage Plan, *Heritage Ireland 2030*, will enshrine and support the vital role our built and natural heritage plays in our communities, our economy and our society. Goals regarding the natural environment, and in particular sustainability, will be achieved under the National Biodiversity Action Plan 2017-2021 and its successors.

The Audiovisual Action Plan will enable Ireland to become a global hub for the production of film, TV drama and animation Arts policy, and contemporary arts policy in particular, will continue to be informed by the work of the Arts Council, and their strategy Making Great Art Work 2016-2025. Contribution to the development of EU and international cultural policy will continue through participation in the EU Culture Council and the European Commission's Creative Europe Programme, as well as its membership of key UNESCO cultural conventions and program. Achievement of the aims of Culture 2025, as well as the Creative Ireland Programme, will be overseen by a broad-based Expert Advisory Group, comprising representatives from key public agencies as well as representatives from the broader creative and cultural sector.

The aims of Culture 2025 are already being progressed through current Government initiatives including the Creative Ireland Programme, the 20-Year Strategy for the Irish Language, Global Ireland 2025, the National Biodiversity Action Plan and the Audiovisual Action Plan. Culture 2025 will ensure a unified approach to these cultural policies across Government and to planning and provision within the cultural sector.

## **2.6. Italy**

### **2.6.1. Cultural and creative industries**

As reported from the G20 in 2021, Cultural and creative sectors are a significant source of jobs and income, and also generate important spillovers to the wider economy. They are a driver of innovation, a source of creative skills with strong backward and forward linkages in the economy, and act as a magnet that helps drive growth in other sectors such as tourism. Beyond their economic impacts, they also have significant social impacts, from supporting health and well-being, to promoting social inclusion and local social capital. However, the absence of internationally comparable statistics that reveal their full economic and social impacts also means that the sectors remain largely undervalued in the policy debate.

The promotion of cultural development is part of the 12 fundamental principles in the Constitution of the Italian Republic. In 1985, to support the arts and cultural industry, the Italian government established a fund for the performing arts called "Fondo Unico per lo Spettacolo" (FUS). In 2015, the Italian cultural and creative sector recorded a total economic value of 47.9 billion euros. 86% is direct revenues derived from activities directly linked to the creative chain such as conception, production and distribution of cultural and creative works and services. The remaining 14% comes from indirect revenues related to ancillary or ancillary assets.

In 2021, the Italian Ministry of Culture, otherwise known as Ministero della Cultura (MiC), allocated a budget of 2.9 billion euros to finance culture, heritage, and tourism. Looking at the

funds dedicated to performing arts, it was estimated that the MiC will assign the highest figure to opera foundations, followed by the live music sector, and theater. These grants did not include additional funding allocated to the arts and cultural industries during the coronavirus (COVID-19) pandemic. For this, the Italian government implemented a series of financial measures in 2020, including an emergency fund of 245 million euros for performing arts, cinema, and the audiovisual sector. Apart from these main measures, most self-employed workers in Italy received a monthly fund of 600 euros between March and May 2020.

### 2.6.2. Definitions and concepts

The concept of cultural industries is not new, and it refers, more specifically, to the creation, industrial reproduction, and mass media distribution of artistic work. The first time this definition emerged dated back to 1947 within the School of Frankfurt. With the publication of the book “Dialectics of Enlightenment”, Theodor Adorno and Max Horkheimer, philosophers and social critics, coined the term to explain the transformation of culture into commercial object to be consumed. Therefore, the meaning of CCS was all but positive in the vision of these two personalities at its first stage.

Probably the most precise definition of the concept of 'cultural industry' is the one articulated by UNESCO in 1982, which defined it as the production and reproduction of cultural goods and services, stored and distributed on an industrial and commercial scale, following strategies based on economic considerations rather than on strategies concerning the cultural development of societies. After this definition, cultural industries started to be associated with technological advances, media evolution in society, and distribution methods to reach global markets. In general, the notion refers to a wide range of cultural production, including textual, music, television, cinema production, publishing, visual and performing arts, architecture.

During the 90s, in the EU, the concept evolved towards the “creative economy”, which conceived creativity as a tool for innovation, an opportunity to open up the artistic field to technological innovation and, above all, to business development. This led to adopting the term 'cultural industry' and to conceive it today in these terms. More precisely, the United Kingdom defined these industries as “those which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation [...]” ('Creative Industries Mapping Document', DCMS, 2001). However, the definition is not unique for everyone, and it is adopted on a national level, depending on the local evaluations.

More concretely, in Italy under the CCI definition falls various fields of knowledge and practices. We hereby list ten of them with some number referring to 2015, such as Architecture (with an economic value of 2,4 mld); Performing Arts and Visual Arts which is characterized by a multitude

of artists and activities (with an economic value of 4,7 mld); Audiovisual sector (with an economic value of 14 mld); the book industry (with an economic value of 3,1 mld); the Music Chain (with an economic value of 4,7); the Advertising Industry Sector (with an economic value of 7,4 mld); the Newspaper and Periodicals sector (with an economic value of 4,7); the Radio sector ((with an economic value of 0,86 mld); and Videogame (with an economic value of 3,4 mld).

### **2.6.3. Education and employment in cultural and creative sector**

The Italian territory offers a conspicuous number of places where art and creativity are taught. In fact, there are already specialized courses with sections on visual arts, architecture, and cinema where students can be introduced to education in cultural heritage and the formation of their professional pathways.

Among these places, there are 21 academies dedicated to visual art and art history scattered in the territory, such as the one of Venice, specialized in Painting, Decoration, Sculpture, Graphic Art, as well as in Scenography and New Technologies of Art, the one of Florence, one of the most ancient of the country with a specialization in Interior design and museum education, or NABA (Nuova Accademia di Belle Arti) of Milan and Rome recognised by the Higher Education in Art and Music system (AFAM, Alta Formazione Artistica e Musicale), regulated by the Ministry of University and Research (MUR). Art History is also at the center of public and private universities providing bachelor's and master's degrees in cultural heritage and visual arts but also design, fashion, and communication. Among them, it is worth mentioning the University of Rome La Sapienza, with a programme in Historical and Artistic Heritage (public) or IED in Milan, with a programme in art, industry, finance, fashion and design (private).

Despite the high number of cultural offers into academia in Italy, the number of employments is not correlated. According to some analysis conducted by the University Consortium, five years after graduation, among second-level graduates in 2013, 11.3% of those employed work in the "cultural" field (5,571 graduates). Of these, the majority are architects/construction engineers (6.9% of the total operated). These professions stand out from all the others due to the occupational peculiarities linked to the start of a freelance career. Only 1.3% work in the tourism sector; all other professions account for less than 1%.

Among the most recent initiatives to relaunch the country, in 2021 the Italian Ministry of Culture launched a National Plan for Heritage Education focusing on the country's cultural, economic, and social recovery. The plan aims to promote the relaunch of educational actions and heritage through social responsibility and civic involvement; contribute consolidating collaborative networks inside and outside the Ministry to encourage participation and cultural sharing.

#### **2.6.4. Cultural creative sector in economic growth**

In Italy, there are 57 UNESCO World Heritage List sites, and according to various scholars, they represent only the tip of an iceberg of impressive dimensions. For years, the Italian Environmental Fund (Fai) has also been involved in surveying Italy's artistic and cultural heritage. Fai's estimates show that there are more than 4,000 museums, 6,000 archaeological sites, 85,000 protected churches, and 40,000 historic residences in Italy, not to mention the open-air art on the coasts, reserves, and natural landscapes.

Five years ago, the Court of Auditors tried to estimate the value of this asset. According to data from the State's General Accounting Department, Italy's heritage is therefore worth at least EUR 986 billion in financial and non-financial assets. Works of art classified as movable property of cultural value, libraries and archives are worth 174 billion euro (10.4% of our GDP). Despite these figures, there are significant problems in terms of employment.

According to an analysis conducted in 2019, before the pandemic, the sector involved 416,080 enterprises (6.8% of the total) which are divided between two types of enterprises. Companies with a core business in the cultural sector (291,025) and creative driven companies (125,054), i.e. those that are not part of the supply chain but use cultural and creative content and skills. Together, these enterprises employ 1.55 million people, or 6.1% of total employment, a growth of 1.5% compared to 2017.

As for the profession, according to 'Io sono cultura' 2018 data, the most common profession in this sector is that of designer (13%), followed by architects (7.1%), graphic designers or illustrators (6.6%), photographers (6.3%). Halfway down the list are event organisers (4.8%) and communicators (4.7%). Below 3% are video makers, artists, writers, authors, storytellers, directors and below 1% musicians, actors and dancers.

#### **2.6.5. Covid-19 pandemic impact on cultural and creative sector**

In the years preceding the pandemic, CCS in Italy had shown signs of growth after the complex crisis that hit the economy in 2008. In fact, The Cultural and Creative System was growing and accounted for 5.7% of Italian added value: over EUR 90 billion, or 1% more than the previous year. The Italian CCS employed more than 1.5 million people, i.e. 5.9% of Italian workers.

On March 9<sup>th</sup>, 2020, Italy was the first country in Europe to go into lockdown, and from that moment on, the cultural and creative system has been profoundly affected. Museums, cinemas, theatres, concert halls, bookshops, artistic and creative spaces of all kinds have closed their doors, preventing the maintenance and production of new events related to the sector. In other words, sectors related to events and physical locations (defined as venue-based, such as

museums, performing arts, live music, festivals, cinema, etc.) were the most affected by social distancing measures. The sharp drop in revenues puts their financial sustainability at risk and has led to wage reductions and redundancies with repercussions on the whole system.

In fact, the pandemic has profoundly reduced the wealth produced by the Italian cultural system. This is what emerges from the 'Io Sono Cultura' report, which analyses the evolution of the sector in terms of wealth production and job creation. The negative effects the health crisis have on the cultural and creative system are significant. The wealth produced by the sector fell by -8.1% compared to the national average of -7.2%; employment also fell considerably, with a variation of -3.5% (-2.1% for the entire Italian economy). In both cases, core activities suffered the most, with a contraction of -9.3% and -4.8%, respectively.

### 2.6.6. Challenges/Opportunities in CCS

In recent times, foundations, banks, and energy companies have intervened more effectively to help and give support to projects and the public administration, which manages more than 3,000 of the approximately 5,000 museums, palaces and monuments that generate an annual expenditure of around 250 million euros. Sponsorship operations, for example, restored many of Italy's assets, while in other cases, they have focused on providing concrete support to Made in Italy producers.

However, during the pandemic, challenges became particularly severe, and the support provided by sponsorships and private institutions was not enough. The cultural and creative sectors are primarily composed of micro-enterprises, non-profit organisations and creative professionals that often operate on the margins of financial sustainability. Large public and private cultural institutions and companies depend on this dynamic cultural ecosystem to provide creative goods and services. Although, national and local governments around the world have introduced multiple measures to support workers and businesses in the light of the COVID-19 pandemic, many of these were not appropriate for the sector's specificities. In fact, employment and income support measures are not always accessible or adapted to the new forms of atypical employment (freelance, intermittent, hybrid - e.g. combining paid part-time work with freelance work) that tend to be more precarious and are more common in CCS.

To give support to CCS during the lockdown, the Italian Government provided direct financing and investments through the so-called "Fondo per la Cultura". "[...] A fund with an endowment of 50 million euros for the year 2020 is established in the estimate of the Ministry for Cultural Heritage and Activities and for Tourism, aimed at promoting investments and supporting other interventions for the protection, conservation, restoration, use, valorisation and digitalisation of tangible and intangible cultural heritage. A decree by the Minister for Cultural Heritage and

Activities and Tourism, in agreement with the Minister for the Economy and Finance, shall establish the terms and conditions for the operation of the fund. [...]".

### 2.6.7. Skills needed for CCS

The Ministry of Education guarantees all pupils of all levels access to Italian culture and artistic heritage through the promotion of theoretical and practical activities, as well as with workshops, linked to the themes of creativity through the educational system.

The issue of the acquisition and development of transversal skills in young people has become central in Italy with the reform of "La Buona Scuola" [Law 107/2015](#) and has been further strengthened with [Decree 774/2019](#) of the Ministry of Education with which the Guidelines on the paths for transversal skills and orientation (PCTO) were defined, in line with the European guidelines and, in particular, with the [Recommendation of the Council of the European Union of 22 May 2018 \(2018/C –189/01\)](#) relating to "key competences for lifelong learning". PCTOs are paths that aim at the development of transversal and technical-professional skills in CCS.

Some of these skills have been highlighted from the National Policies Platform of the European Union as follows:

- historical-critical knowledge, practice and conscious use of painting, sculpture, graphics, decorative arts, design, artistic craftsmanship and Italian creative productions
- Interpersonal skills: creating a good network of people working in the sector could be fundamental to generating opportunities and events.
- Communication: communication skills are critical to interact professionally and spread your content to reach the public and other people of your own sector.
- Adaptability: adapting to the changing needs of your organization and the requests of those you interact with is relevant to satisfy your colleagues and find new solutions for the project you work on.
- Creativity: with this word, we both refer to creative thinking – which is essential to raise new ideas and give shape to them into a performative sector mainly based on temporary events.
- Critical thinking: CCS employees should be aware of the difficulties and unexpected events that might show along their path and find sustainable solutions.
- Financial and economic basis: CCS initiatives require management of the budget from the employees that should be able to allocate the expenses to achieve the goals.
- Knowledge of the system: CCS professionals should have knowledge about the artistic system of their country, its main institutions, its differences, and its characteristics.



- Team building: CCS employees are almost never singular individuals. Most of the institutions, traditional or spontaneous, require the ability to listen, understand, and collaborate collectively.

### 2.6.8. Digitalization in cultural and creative sector

During the 2020s, digital channels have been the protagonists of a strong development both on the demand side - with a consumer base that has expanded at previously unknown growth rates and, on the supply side, becoming crucial tools for companies and associations in their relations with the public.

The pandemic crisis has in fact accelerated the process of digitization of the various sectors of the Italian economy; an evolution that offers users the possibility of accessing content and services in a more personalised and flexible way, making the fruition of audiovisual contents and cultural experiences more frequent and accessible. The National Recovery and Resilience Plan (PNRR) allocated 500 million euro grants to digitize public and private cultural heritage and create digital infrastructures and platforms for the preservation of and access to digital cultural resources. One of the most concrete examples is “ItsArt”, a channel promoting Italian culture, arts and creativity, presenting new talents and iconic places (<https://www.itsart.tv/gb/>).

The reception from the public was twofold. On the one hand, many initiatives related to culture were highly appreciated and saw good participation in numbers; on the other, despite the importance of digitization and virtual events, as soon as physical places started to reopen, the public preferred to come back inhabiting real areas. This is also because more and more virtual events required payment and were not for free.

### 2.2.9. Government policy

There is no doubt that Culture is one of the most critical drivers of economic growth in our country. This very important function of culture finds the necessary conditions to be expressed in the unprecedented funding and investments that the Government has put in place over the last year, especially through the PNRR (National recovery and resilience plans) that allocates 6.68 billion euros to the 'Tourism and Culture' sector, which plays a special role within the production system (tourism alone accounts for about 12 per cent of GDP).

The Plan is articulated in different missions, of which we will give a brief explanation in this section. The first mission concerns “the cultural heritage for the next generation”. In fact, 'Digitization, innovation, competitiveness, culture and tourism' are at the center of the strategy. 12 projects to increase, organize, integrate, and preserve the digital heritage of archives, libraries,

museums, and cultural sites have been approved to offer citizens and operators new ways of using them.

The second mission is about the “Regeneration of small cultural sites, religious and rural cultural heritage” to enhance the great heritage of history, art, culture and traditions in inland areas with their enormous landscape and cultural value and great potential for economic growth. Protection and enhancement of architecture and the rural landscape and programs to enhance historic parks and gardens are also included.

The third mission specifically regards the CCS and is entitled “Cultural and Creative Industries 4.0”. it encompasses investments in the film and audiovisual sector to improve its competitiveness. Enhancement of Cinecittà film studios to increase the quality and quantity of the production offer and its attractiveness for national, European and international film productions. Funds are also foreseen for Capacity Building of cultural operators to manage the digital and green transition.

## 3. BEST PRACTICES

### 3.1. France

#### 3.1.1. CASE 1: Live stand-up online during lockdown

- Organization: Barbès Comedy Club
- Type: Stand-up
- CCS Sub-sector: Live performance
- Description: During the lockdown in May 2020, the Barbès Comedy Club, a Parisian a comedy club, organized three live shows on Facebook and YouTube. And thanks to the Zoom app, comedians were able to see the reactions of a real audience. In the lockdown context of the Covid-19 pandemic which prevented any live show, all theatres and comedy clubs shut down, making it impossible for stand-up comedians and all technician (lighting, sound, stage management, stage directors, etc) and administrative professions (comedy club directors, producers, etc) around them to work. Locked up at home without work, many comedians first started to post short comic videos or mini-series on social networks. Then a comedy club decided to organize a return to a virtual stage with a real audience present from their own home. The Barbes Comedy Club organized three live shows thanks to a new live device in cooperation with Blonde Production, a video production company. The challenge was to recreate on the Internet the atmosphere of a stage, with several comedians presented in a row. On the screen, a master of ceremonies and an artist in large, as well as an audience spread out in a mosaic of small boxes. There were 100 spectators present for the live event. Their microphones were closed so that it didn't not interfere with the performance of the comedians, but they were able to see their reactions live. As a live performance, stand-up comedy, is an art depending a lot on the stage quality and the audience reaction. Having good digital and technical solutions to allow that is a real challenge. The organizers developed new types of partnerships and trained themselves on digital tools to find the best quality solutions to recreate the atmosphere and interactions.
- Reference Link: <https://www.leparisien.fr/culture-loisirs/confinement-du-stand-up-en-live-sur-internet-ce-week-end-02-05-2020-8309592.php>

#### 3.1.2. CASE 2: e-cinema organized by a movie theatre in the Basque Country during the lockdown

- Organization: Atalante
- Type: Cinema
- CCS Sub-sector: Audio-visual media

- Description: During the first lockdown in April 2020, the movie theatre Atalante organized three e-cinema sessions with the film "En politica", one of was followed by an online interview with the main character of the movie. The organization of these sessions was intended to be as close as possible to the reality of a classic movie night. It was neither Video-On-Demand nor streaming. The spectators logged in to a website to watch the movie "live" and they could ask questions via live chat during the interview after the movie. The access to the virtual cinema was delocalized, only the people located in a perimeter of 5 to 50 km around the Atalante (in Bayonne, in the Basque Country) could access it. The movie theatre had to set up a whole new technical system as they had never done e-cinema before allowing them to develop new skills and possibilities for the future.
- Reference Link: <https://www.sudouest.fr/sante/coronavirus/nouvelle-aquitaine/bayonne-l-039-atalante-propose-des-seances-de-e-cinema-1995217.php>

### 3.1.3. CASE 3: Culture Chez-Nous

- Organization: France Ministry of Culture
- Type: Public Authority
- CCS Sub-sector
- Description: During the Covid-19 Pandemic many cultural and creative organizations cancelled their activities due to the restrictions and it was impossible to reach the audiences for the CCS sector. In this situation government has focused on digitalization and tried to find digital solutions. So, Ministry of Culture set up a digital platform called Culture Chez-Nous that brings together a variety of creative and cultural resources for virtual consumption. The platform covered many areas such as Archaeology, cinema, museums, documentaries, shows, youth, heritage, dance, music archives. In each of these areas, the Ministry of Culture and its operators have exceptionally rich cultural resources, and they offered an artistic journey through all the richness of culture, bringing together in a single site the online offer of nearly 500 cultural actors. So, people can easily access all cultural and creative events online
- Reference Link: <https://www.culturecheznous.gouv.fr>

## 3.2. Bulgaria

### 3.2.1. CASE 1: The Poets

- Organization: The Poets
- Type: Art Project
- CCS Sub-sector: Performing Arts

- Description: The cultural project "The Poets" started as a video project in 2017, in which famous Bulgarian actors presented some of the best Bulgarian poems with a new and contemporary interpretation. The few recorded videos published on youtube.com have a huge viewership, and millions of viewers watch. This gave the artists the courage to separate their initiative as an independent project Poets Live, where they meet the audience with their favorite poems live. The project's aim became even more apparent - to bring people back to the way poetry was written - naturally and from the heart. Not to be recited, not to be formal, but to give new life even to words written over a hundred years ago. Though the project was rapidly gaining momentum, the Covid-19 pandemic closed the scenes. That prompted the artists to look for opportunities to continue their encounters with the public, and they realized several online performances (live stream). One of these virtual encounters is in the run-up to the Christmas holidays of 2021. This performance aimed to create a sense of connectedness, "quench" the thirst for words as only poetry can and fill the feeling of loneliness for people far from their loved ones because of the pandemic situation and the conditions of distance. The artists provide free codes/tickets for the elderly and disadvantaged to make this even more possible. Online live performances have huge attendance. Through them, poetry reaches the homes of Bulgarians from different cities, villages and different countries. Currently, the project has created its own platform, planned performances for Bulgarians in different European capitals and two published books that collect some of the poems that the audience listens to on stage. The second book, Poets and Love, contains photos from the project's events and personal messages from each of the artists who perform the poem.
- Reference Link: <https://poetite.live/>  
[https://www.facebook.com/events/390869192750431?active\\_tab=about](https://www.facebook.com/events/390869192750431?active_tab=about)

### 3.3. Cyprus

#### 3.3.1. CASE 1: Portability project

- Organisation: MYDOCUMENTA, UIC International University of Catalonia, Universidade Aberta of Portugal, European University of Cyprus, UNIVERSITAT POLITÈCNICA DE VALENCIA, MEDIA DEALS
- Type: Erasmus+ Project KA2
- CCS Sub-sector: ...
- Description: Professionals in the CCI lack adequate entrepreneurship skills. When launching a product or service, creative arts entrepreneurs are excessively concentrated on the functional features of their new idea and not so much on the business approach. CCIs also need people who have business competences, who can mobilize financing opportunities, who understand ICT. It remains difficult for CCIs to find creative arts graduates with a mix of creative and entrepreneurship skills to set-up companies. Lack of innovative entrepreneurship education for CCI graduates. Entrepreneurship training for students & alumni graduates in the Cultural and Creative Industries (CCI) sector is rarely if ever, provided during their time at university. The traditional teaching methods are inefficient in the case of this professional group. This relates to the wide variety of

artistic/creative entities and activities. In fact, the European Parliament's report on EU policy for cultural and creative industries (June 2016) recommends to the European Commission "the creation within HIE institutions of relevant joint programs between arts and culture, business and technology for the development of work-learn trajectories". Innovative entrepreneurship education for CCI graduates. Teaching innovative and collaborative thinking competences to students well beyond traditional business skills: questioning, asking challenging questions, seeking for new ideas, experimenting new options to generate novel designs, simulate the business behaviors at the university, idea networking, working together, collecting their entrepreneurship evidences providing innovative digital tools to present to the future entrepreneur, strengthening public views of entrepreneurs' contribution to EU's welfare. Understand the new SYSTEM DYNAMICS (SD) methodology and how to use it. Understand the nonlinear behaviour of a complex system over time using concept maps, associations maps, flows, feedback. Use SD models to simulate the behaviour of business topics. Students and entrepreneurs of CC degrees can learn a curriculum consisting of 3 ECTS credits focused in PBL of entrepreneurial & e-business competences. Use the eportfolio collaborative platform to evidence the entrepreneurial & digital skills acquired and transfer them to the labour market helping graduates & alumni to connect with financiers and the world of work. SD models that simulate the behaviour of business topics will be developed by the HIE creative arts professors with the collaboration of MBA professors, a pan-European CCI investor network and commercial private local working groups. A curriculum compliant with EntreComp designed specifically for the CCI with practical & useful OERs that educators can use in the classroom with a supportive guidance role. These eLearning materials are delivered and assessed by professors of CCI degrees through a competency eportfolio. Professional development of professors & HIEs institutions of CCI degrees by tackling entrepreneurship & digital competences gaps.

### **3.4. Greece**

#### **3.4.1. CASE 1: Digital concert of Dimitris Papadimitriou**

During the COVID-19 pandemic many CCS employees scheduled online performances, concerts, speeches and other digital activities. Notable is the digital concert of Dimitris Papadimitriou which implemented in the framework of an offer organized by the Precinct of Eastern Macedonia and Thrace.

Dimitris Papadimitriou has composed symphonic plays, pieces for solo instruments and combinations of instruments, music for theatre and Greek cinema for Greek television and TV series in Sweden, France, Germany and elsewhere.

This concert was intended to financially support the Alexandroupolis University Hospital, which was a reference point for the coronavirus in the entire precinct. Throughout the concert, citizens and businesses - to the extent that each and every one can offer - had the opportunity to contribute to the support of the Alexandroupolis University Hospital, with deposits through the

special account of the Pharmaceutical Association of Evros, which contributed with pharmaceutical equipment, which is essential and necessary in the days of the pandemic, since practical solidarity is valuable. The online concert was simultaneously broadcasted by other major websites and television stations.

Despite the valuable contribution of the concert, both participants and the facilitators faced difficulties regarding the digitization. Regarding the organization of the concert initially had to identify how to organize, store and retrieve data, information and content in a simple way in digital environments in order to evaluate the impact of the concert. Major importance in digital environments is the safety especially when banking transactions are to be carried out; consequently, it was essential to perform the analysis, comparison and evaluation of the credibility and reliability of the medium as well as to develop skills in order to manipulate information, data and content for their easier organization, storage and retrieval. Digital concert should be user friendly, easily accessible and effortlessly navigate, which requires effort and knowledge. To achieve the desired result, advanced technology had to be used in order to cope with the volume of monitored users. Digital barriers required digital literacy for both technicians and artists.

CCS is a sector that interacts with the public and improves their performance according to the audience feedback as most CCS employees try to understand their target audience value and fit their job into their lives, which is not feasible in digital environments. Lack of interactivity also affects the audience on the level of engagement as they are not able to communicate and give directly feedback. Moreover, many people were excluded due to not having access to the internet or low speed internet connection that covers data intensive experiences.

After the end of the concert, it is estimated that the resonance was appreciable and as a result the hospital was strengthened and was able to cope with the demands of the pandemic.

### **3.5. Ireland**

#### **3.5.1. CASE 1: Creative Ireland Programme**

The Creative Ireland Programme is the Irish Government's major five-year initiative, from 2017 to 2022, which places creativity at the center of public policy. It is an all-of government initiative to mainstream creativity in the life of the people so that individually and collectively, in our personal lives and in our institutions, we can realize our full creative potential. It is the main implementation vehicle for the priorities identified in Culture 2025, which sees a vibrant cultural ecosystem as essential to society.

The core proposition of this culture-based program is that participation in cultural activity drives personal and collective creativity, with significant implications for individual and societal wellbeing and achievement. Its main feature is the collective mobilization of Irish institutions and citizens to create an Irish cultural legacy. It brings an enhanced level of coordination, focus and leadership to existing policies and initiatives across national and local government, State

agencies, the arts and culture sector, Gaeltacht and Irish language organizations, and provides linkages to the private business and NGO sectors.

It also supports a representation of Ireland to the outside world that is well grounded, widely understood and meaningful. Creative Ireland coordinates and enables the construction of that representation, seeking coherence among all stakeholders and placing a clear focus on our rich cultural heritage and our creativity.

Under the guiding principles of creativity, collaboration and transformation, the Programme strives to

- promote understanding and appreciation of the value of creativity in all its forms,
- engage and influence decision-makers to embed creativity across public policy; and
- support and enable participation in creative industries.

The Creative Ireland program consists of five pillars.

1. Enabling the Creative Potential of Every Child,
2. Enabling Creativity in Every Community,
3. Investing in our Creative and Cultural Infrastructure,
4. Ireland as a Centre of Excellence in Media Production, and
5. Unifying our Global Reputation

Culture and Sustainability The UN 2030 Agenda for Sustainable Development and associated Sustainable Development Goals place an onus on all of us in Ireland, as individuals and as a society, to conduct all aspects of our lives in a more sustainable manner. Cultural policy and expression have an important role to play in assisting a fair transition to a more sustainable future. The policies, programs and infrastructure that underpin the cultural sector can contribute to that transition by ensuring that, through their implementation, every opportunity is taken to pursue and promote sustainable practices. The cultural sector, through its artists, performers, writers, designers, developers, educators and others, can also harness their intellectual leadership and the power of their creative expression to raise awareness of sustainability and climate threats and to promote alternate approaches to meeting the related challenges for their own sector, for the public at large, and for actions across all relevant public policy areas.

The vision Creative Ireland is the belief that participation in cultural and creative activities promotes the wellbeing of the individual, the community and the nation. They work with decision makers in central and local Government, State agencies, sectoral bodies, NGOs including community organizations, individuals, and partners to deliver creative projects that will enable our citizens to counteract isolation, create connections with the community, generate joy and above all enable all to realize their creative potential.

Culture 2025 is underpinned by certain key values:



- The intrinsic value of culture.
- The value of arts, culture and heritage to our lives and our communities.
- The right of everyone to participate in the cultural and creative life of the nation.
- The value of creativity to individual and collective wellbeing.
- The importance of the Irish language, our cultural heritage, folklore, games, music and the uniqueness of our Gaeltacht areas.
- The value of cultural diversity, informed by the many traditions and social backgrounds that constitute contemporary Ireland.
- The value of culture as a means of fostering a more sustainable future for Ireland, including through economic, environmental and social policy.
- The value of culture in presenting Ireland to the world

### 3.6. Italy

#### 3.6.1. CASE 1: Polo del 900 of Turin: a successful case of digitization

- Organization: '9centRo'
- Type: Public Organization with the support of a private Institution
- CCS Sub-sector: Archives, Libraries, History and Culture
- Description: Italian cities are dotted with several foundations, associations, bodies and more that play a crucial social, political and cultural role. Realities that are sometimes large, much more often small, if not very small, and which for this reason do not always succeed in adequately disseminating their work. But what would happen if a large number of organizations came together under one umbrella, creating a collaborative reality with a strong focus on social innovation? The answer to this question is the Polo del '900 of Turin, that can be considered a successful case study in CCS, since it collected under one digital reality, called '9CentRo', 609.501 factsheets, 556 archival funds, 74. 227 images, 20 cultural institutions, such as Politecnico di Torino, Centro Internazionale di Studi Primo Levi, Fondazione Sandro Penna/Fuori, and many others. Born in 2018, '9centRo' is the platform that collects the cultural heritage of the partner authorities of the '900 Pole: an instrument born to bring closer, interest and activate different audiences, promoting the accessibility to the cultural heritage, the activities of research and divulgation of the heritage and the cultural production. An opportunity to read up offered by the academics to the citizens that love History. How is it effected during the pandemic? Born in 2016, housed in 8 thousand square meters of the buildings of San Daniele and San Celso, supported by a public/private mix in which the municipality of Turin, the Piedmont region and the Compagnia di San Paolo foundation participate. It is supported by a public-private partnership involving the municipality of Turin, the Piedmont region and the Compagnia di San Paolo Foundation. It includes 22 20th-century and anti-fascist organizations: from the ANPI to the Piero Gobetti Study Centre, from the Associazione Nazionale Combattenti e Reduci to the Antonio Gramsci Foundation of Turin, from the Museo Diffuso della Resistenza to the Primo Levi International Study Centre and the Centro Sperimentale Cinematografia. Already in 2016, the fundamental objective was to create a digital hub.

During the creation of virtual activities such as podcasts, online projects, sharing of new research funds by CCS scholars. For this reason, we can consider it a virtuous case that reacted wonderfully during the impact of Covid-19. Challenges/Barriers to reach the audiences: The immense archive of the Polo del '900 thus becomes the starting point from which artists, writers or performers can produce shows, creating, for example, graphic novels with a historical theme or experimenting with artificial intelligence: 'The archive becomes the lymph to generate new imagery and new languages,' Alessandro Bollo continues. "But the desire to invest in our archive is also shown by its digitization and the integration of our assets within a single platform, characterized by a very simple interface. A sort of Google of our archive, which allows you to navigate through some 400,000 objects that can be consulted". Today, in the changed context of resources, consumption and policies, a profound reflection is required on how to operate and dialogue with civil society - especially young people and new citizens on the themes of memory, democracy and citizenship, in order to overcome the mere preservation of memory and the exclusive dialogue with restricted groups of scholars and enthusiasts. The result is not a mere cohabitation, but a spatial and functional integration that, starting from the heritage of documentation owned by each institution, with an insufficient critical mass, has led to the establishment of a system pole for the dissemination of the themes of democracy and citizenship and for the protection, preservation and digitization of archives and libraries, giving rise to an innovative and sustainable cultural and management model that is unparalleled in Italy and among the first in Europe. Given the vast number of documents collected and digital initiatives, the audience is very wide and refers not only to young scholars and researchers, but also to curious citizens and culture enthusiasts of more mature age that since 2018 use the virtual platform. Developing necessary digital and entrepreneurial skills: This is how in 2018 '9centRo' was born, a platform that has made this archival heritage accessible to everyone: "Think that before digitization, these archives were used by very few people. In the last three years, however, we have had 56,000 visits and thousands of users, 62% of whom were from outside Turin", continues Bollo. These are important numbers for an archive that obviously houses materials of a certain type and shows what results a push towards innovation can bring. From this point of view, the Coronavirus pandemic played a crucial role. Not only did force everyone to speed up their digital skills, but it also forced a space like the Polo del '900 to rethink the planning of events, including streaming activities on demand, podcast and interactive documentaries. It is a point of reference for research and studies on the twentieth century designed for scholars, archivists and students, but also for those approaching it for the first time: enthusiasts, the curious, artists and, of course, teachers who can use the archival sources and multimedia paths created by the Pole's organizations to support teaching. In addition, the new entry of the archives of the Politico di Torino has been accompanied by a graphic and structural restyling of 9CentRo, which now has a new version that makes searching through the vast amount of content more intuitive and dynamic, easy to access and to develop necessary digital skills. Experimenting with non-traditional physical distribution formats such as digital solutions: During the pandemic, in fact, '9centre' has allowed the continuity of research and cultural growth, providing remote access to a very wide audience, and enabling the consultation of materials that

would otherwise have been impossible to analyse during the lockdown. For this reason, in 2020, with 9centRo, the Polo del '900 won the Gianluca Spina Award for Digital Innovation in Cultural Heritage and Activities, promoted by the Osservatorio Innovazione Digitale nei Beni e Attività Culturali of the Politecnico di Milano. The culture of the Italian 20th century has thus been transformed into something digital and made available through documentaries, thematic paths, image galleries, biographical insights into historical figures, podcasts and much more, radically transforming the way to conceive the CCS and its material.

- Reference Link: <https://archivi.polodel900.it>

## 4. METHODS

### 4.1. The aim of the research

The DiGiPORT project aims to equip adult trainers and adult education organizations in order to enable them support CCS professionals and artists with developing the necessary digital and entrepreneurial skills that will allow them to ensure their sustainability and, also, to enhance their resilience towards similar challenges and crises. Moving onwards from the competences' development, the DiGiPORT project aims to develop and establish a pan-European online platform that will allow CCS professionals and artists to establish their own digital pop-up shops, through which they will be able to promote and disseminate their work and reach out to their target groups. The desk research analysis aims to provide background information to shape the innovative training materials and development of DIGIPORT Project results. The desk research report seeks to identify the particular characteristics of, and challenges faced by the CCI sector in relation to skills needs, education and training, economic sustainability and Covid-19 pandemic impact. It will also include insights gathered from the CCS professionals / artists.

In short, the overall objectives of the research:

- To define a broad overview of the CCI sector in the context of the DIGIPORT project.
- To develop a needs analysis on the digital and entrepreneurial skills mismatches and gaps of CCS
- Provide information on the CCS in terms of economy and labor market including challenges and opportunities
- Analyze the data gathered from CCS professionals / artists via interviews and surveys

### 4.2. Methodology and Scope

The study employed a mixed research methods to gather data from CCS professionals / artists and adult educations. First, literature review was conducted on CCS in partner countries (France, Ireland, Italy, Cyprus, Bulgaria and Greece). Secondly, qualitative data was collected from the sampling group in each country. Thirdly, quantitative data was collected from the same sampling group. At last, the data was collated into one big report.

### 4.3. Sampling

The sample of the quantitative study was determined by random sampling technique. The sample group consists of 120 professionals working in one of the fields of cultural and creative sector. Demographic information about the participants is presented in Table 1.

**Table 1.** Demographic information of the participants to the quantitative research

Variable	n	%
Country		

	France	20	16,13
	Bulgaria	20	16,13
	Cyprus	20	16,13
	Greece	21	16,93
	Ireland	23	18,55
	Italy	20	16,13
Gender			
	Female	83	66,94
	Male	38	30,65
	Non-binary	3	2,41
Age			
	18-24	24	19,35
	25-34	56	45,16
	35-44	19	15,32
	45 or older	25	20,17
Marital Status			
	Single	69	55,65
	Married	41	33,05
	Separated	1	0,81
	Divorced	6	4,84
	Widowed	1	0,81
	Cohabiting	3	2,42
	Civil Union	3	2,42
Number of Children			
	0	40	32,26
	1	24	19,35
	2	16	12,90
	3	6	4,84
	No answer	38	30,65
Highest Level of Education			
	PhD	6	4,84
	Master's degree	47	37,90
	Bachelor's degree	45	36,30
	Diploma	12	9,67
	High School	14	11,29
Degree in Information Technology/Computer Science/Software			
	Yes	32	25,80
	No	92	74,20
Having an extra job at the same time			
	Yes	77	62,10
	No	47	37,90
Self-employment			
	Yes	55	44,35
	No	69	55,65
Experience in job			
	1-3 years	31	25
	4-7 years	40	32,26
	8 or more years	45	36,29
Motivations to start a business (n=147)			
	To make money	25	17
	To be famous	3	2,04
	To make a difference	30	20,42

To be my own boss	44	29,93
To support family	25	17
Have a job	19	12,93
I do not have my own business	1	0,68
Description of your main activity		
Advertising and marketing	12	9,68
Architecture	5	4,03
Arts and crafts	25	20,16
Design, product, graphic, fashion	14	11,30
Film, TV, Video, Radio, and Photography	13	10,48
Information Technologies, Software	6	4,84
Publishing	3	2,42
Museums, Galleries, Libraries	8	6,45
Music, Performing and Visual Arts	13	10,48
Other	25	20,16
Status in creative industries		
Working full time	22	17,74
Volunteer	12	9,68
Traditional Skills actor	4	3,23
Freelance	29	23,39
Artists	11	8,87
Stakeholder	7	5,65
Student	15	12,09
Teacher or working in education institutions	13	10,48
Unemployed	5	4,03
Other...	6	4,84
Had to shut down company/own business during the pandemic		
Yes	35	28,23
No	88	70,97
Lose your job temporarily or permanently during the pandemic		
Temporarily	43	34,68
Permanently	10	8,06
n/a	71	57,26
Suffer any loss of income during the pandemic		
Yes	66	53,22
No	58	46,78
Access to digital tools (designing, communication, etc.) which are necessary for your work/job during the pandemic		
Yes	99	79,84
No	25	20,16
<b>Total</b>	<b>124</b>	<b>100</b>

The sample of the qualitative study was determined by purposive sampling method. The sample group consists of 20 professionals working in one of the fields of cultural and creative sector. Demographic information about the participants to the qualitative research is presented in Table 2.

**Table 2.** Demographic information of the participants to the qualitative research

Participant	Country	Age	Gender	Job
P1	France	43	M	Graphic designer

P2	France	-	F	Director of a cultural coop.
P3	Bulgaria	51	F	Music teacher
P4	Greece	-	F	Teacher
P5	Ireland	33	F	Working in event industry
P6	Italy	43	F	Project manager
P7	Cyprus	27	F	Freelance illustrator

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#### 4.4. Data collection tools

##### ***Personal Information Form***

It is a form prepared by the project team, which includes questions about obtaining information about the participants' gender, age, country of origin.

##### ***Survey on the Needs of Professionals in Cultural and Creative Sector***

A survey was prepared by the members of the project team, which includes 18 questions about entrepreneurial skills and competences, and the effect of COVID-19 pandemic.

##### ***Structured Interview Form***

The form included questions entrepreneurship, digital skills, and the effects of COVID-19 pandemic on the participants.

## 5. FINDINGS

### 5.1. Quantitative Findings

In this section, in line with the purpose of the research, the entrepreneurial skills of those working in the cultural and creative sector and their level of exposure to the COVID-19 pandemic in the countries where the institutions involved in the DIGIPOINT project are determined.

#### 5.1.1. Entrepreneurial Skills and Competences

According to Table 3, 43.55% of the 124 respondents confirmed that their formal education prepared them to earn a living from their practice. However, 45.16% of them answered that their formal education did not. 11.29% are not sure if their education prepares them to earn a living.

**Table 3.** Whether formal education prepare to earn a living from the practice

Variable	n	%
Did your formal education prepare you to earn a living from your practice?		
Yes	54	43,55
No	56	45,16
Maybe	14	11,29

Table 4 shows that 56.45% of the participants reported that they were working in the same position in which they were trained. However, 32.26% answered 'no' and 11.29% are not sure if they are working in the same field they graduated from.

**Table 4.** Relatedness of job-position with educational background

Variable	n	%
Is your job-position in line with your educational background?		
Yes	70	56,45
No	40	32,26
Maybe	14	11,29

Table 5 shows that formal education prepared the participants mostly for working with other (63.71%), written communication (58.87%), planning and management (34.68%), and digital skills (31.45%).

**Table 5.** Categories that formal education prepare

Variable	n	%
Which categories did your formal education prepare you?		
Written communication	73	58,87
Working with other	79	63,71
Taking the initiative	31	25
Digital skills	39	31,45
Planning and management	43	34,68
Coping with the change	18	14,52



Spotting opportunities	18	14,52
Finances and budgeting	20	16,13
Protecting ideas	26	20,97
Obtaining funding	8	6,45

Table 6 shows that 66.13% of the participants have participated in any informal training program in the past.

**Table 6.** Participation to any informal training program in the past

Variable	n	%
Have you participated in any informal training program in the past?		
Yes	82	66,13
No	42	33,87

Table 7 shows that 35.48% of participants attended non-accredited workshops; 25.81% attended individual courses; and 23.39% attended conferences.

**Table 7.** Kinds of training that attended

Variable	n	%
Which kind of training have you attended?		
Non-accredited workshops	44	35,48
Individual courses	32	25,81
Conferences	29	23,39
Vocational Education Training	24	19,35
Online courses (MOOC)	27	21,77
Formal college education	1	0,81
Other	4	3,23
n/a	26	20,97

Table 8 shows that the trainings that participants had attended included mainly digital skills (29.03%), language training (22.58%), and entrepreneurship (20.97%).

**Table 8.** Areas covered by the training that attended

Variable	n	%
What areas were covered by the training you've attended?		
Digital skills	36	29,03
Social media	10	8,06
Marketing	15	12,10
Entrepreneurship	26	20,97
Finance	7	5,65
Human resources	11	8,87
Language training	28	22,58
Business skills	20	16,13
I have not accessed additional...	28	22,58
Project management	1	0,81
General conference about diff...	1	0,81
Other	11	8,87

Table 9 shows that the participants almost equally need all the skills/competences offered as options in their creative works.

**Table 9.** Skills/competences needed in the creative work in terms of management area

Variable	n	%
Which skills/competences do you need in your creative work in terms of Management area?		
Strategic planning	68	54,84
Project writing	48	38,71
Project management	63	50,81
Internal organization	54	43,55
Stakeholder/people management (network building)	54	43,55

Table 10 shows that CCI workers primarily need to develop their skills in communications (58.87%), online promotion (54.03%), public relations (52.42%), and social media/network (50%) in terms of marketing area.

**Table 10.** Skills/competences needed in the creative work in terms of marketing area

Variable	n	%
Which skills/competences do you need in your creative work in terms of marketing area?		
Communication	73	58,87
Public relations	65	52,42
Online promotion	67	54,03
Social media/network	62	50
Brand development	48	38,71
Digital marketing	45	36,29
Knowledge of foreign languages	39	31,45
Storytelling	36	29,03

Table 11 shows that CCI workers primarily need to develop their skills in budget writing for project financing (54.84%), and business development (50.81%) in terms of finance.

**Table 11.** Skills/competences needed in the creative work in terms of finance

Variable	n	%
Which skills/competences do you need in your creative work in terms of finance?		
Business development	63	50,81
Fund raising	57	45,97
Budget writing for project financing	68	54,84

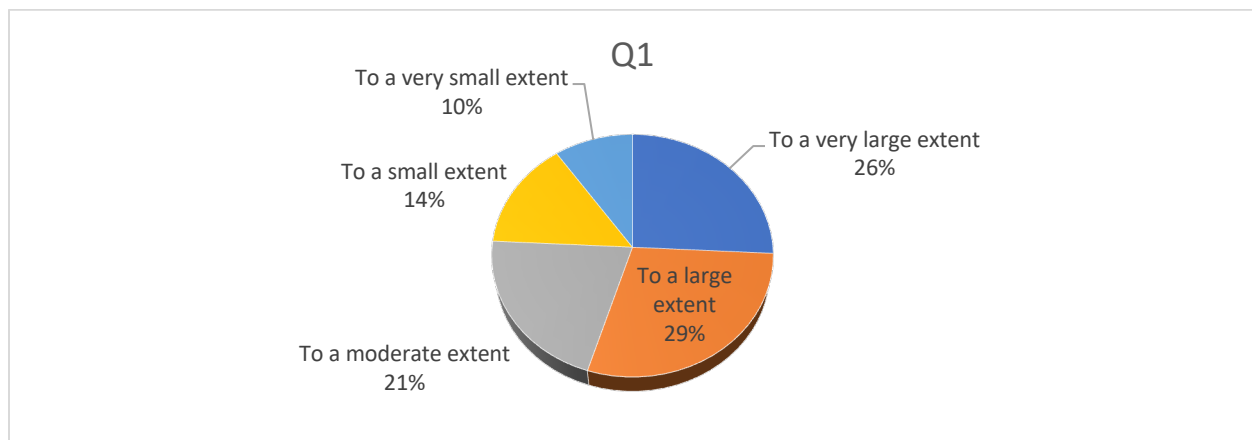
Table 12 shows that CCI workers primarily need to develop their skills in entrepreneurship (56.45%), flexibility and adaptation (50%), and creative and conceptual skills.

**Table 12.** Transversal skills/competences needed in the creative work

Variable	n	%
Which transversal skills/competences do you need in your creative work?		
Team building	39	31,45
Leadership	33	26,61
Entrepreneurship	70	56,45
Communication skills	54	43,55
Presentation skills	53	42,74
Flexibility and adaptation	62	50
Working independently	41	33,06
Problem solving	47	37,90
Creative and conceptual skills	58	46,77
General audience engagement	44	35,48
Specific audience engagement	34	27,42
Experience/emotion creation	32	25,81

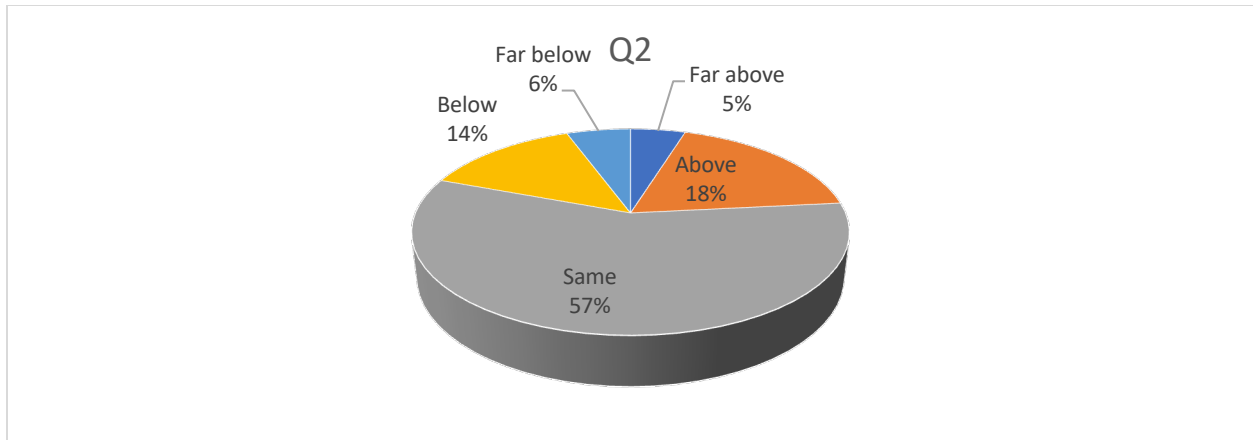
### 5.1.2. The Effect of COVID-19 Pandemic

According to Figure 7, 55% of participant companies/institutions are dependent or very dependent on physical activity at their venues and locations. Meanwhile, only 24% are barely dependent on physical activities at their venues and sites.



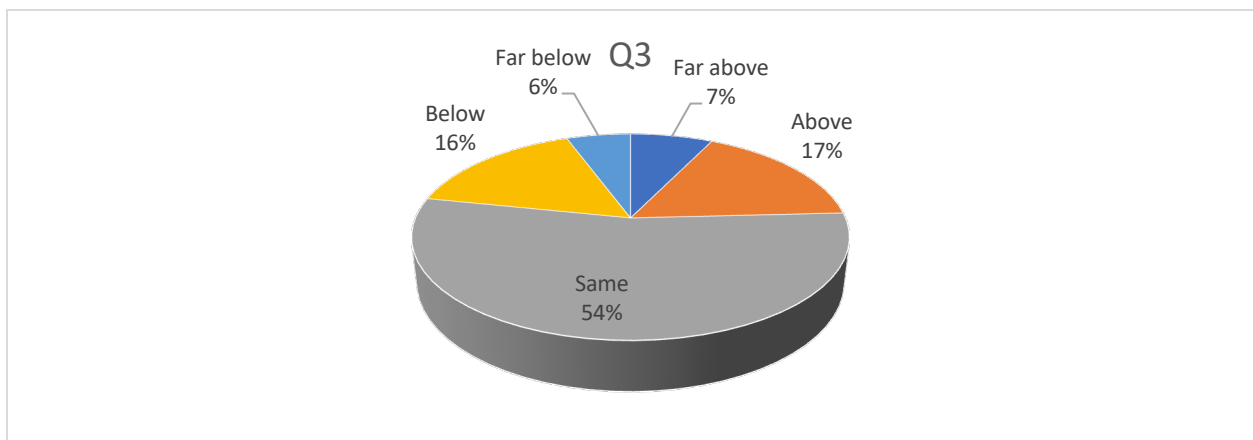
**Figure 7.** Extent of your company/institution depending on physical experiences/activities at venues and sites

According to Figure 8, 57% of participants indicated that the current gross value of their company or their own company has not changed compared to the gross value before the pandemic.



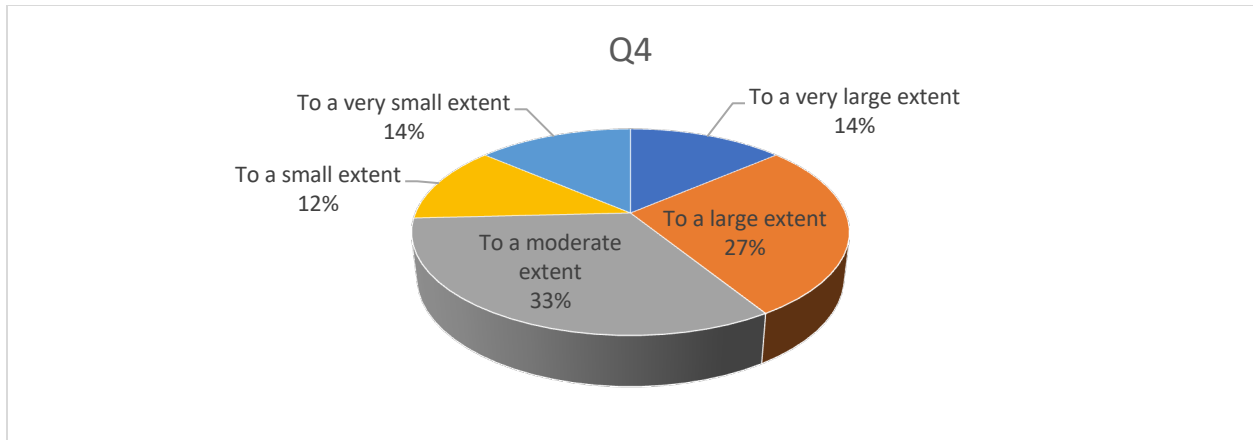
**Figure 8.** Your company/own business' current gross value as compared to its gross value before the pandemic

According to Figure 9, 54% of participants reported that the overall performance of their company or their own company remained the same during the pandemic compared to companies outside the cultural and creative sector.



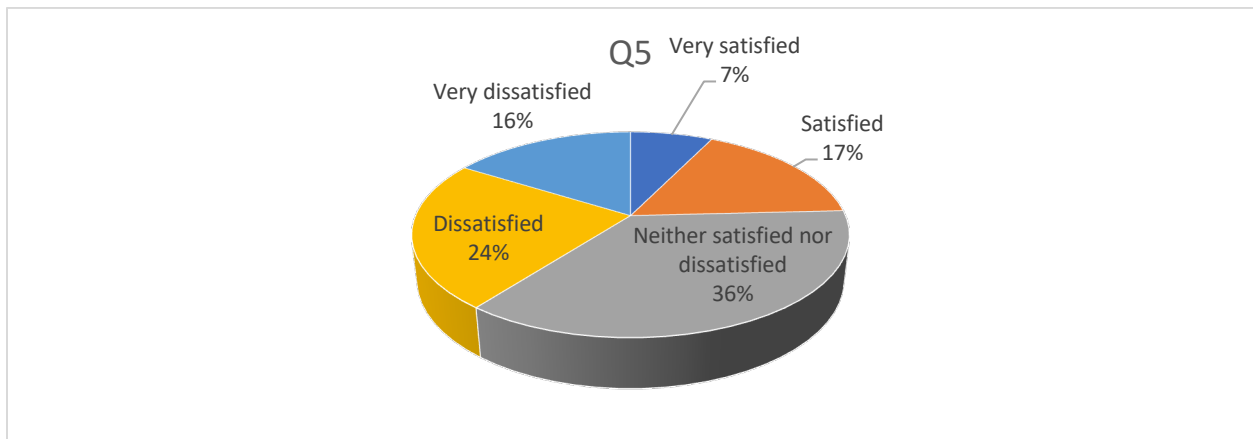
**Figure 9.** Your company/own business' overall performance as compared to businesses other than Cultural and Creative Sector during the pandemic

Figure 10 shows that 41% of participants reported that the amount of their salary/income was affected either very much or a lot during the pandemic.



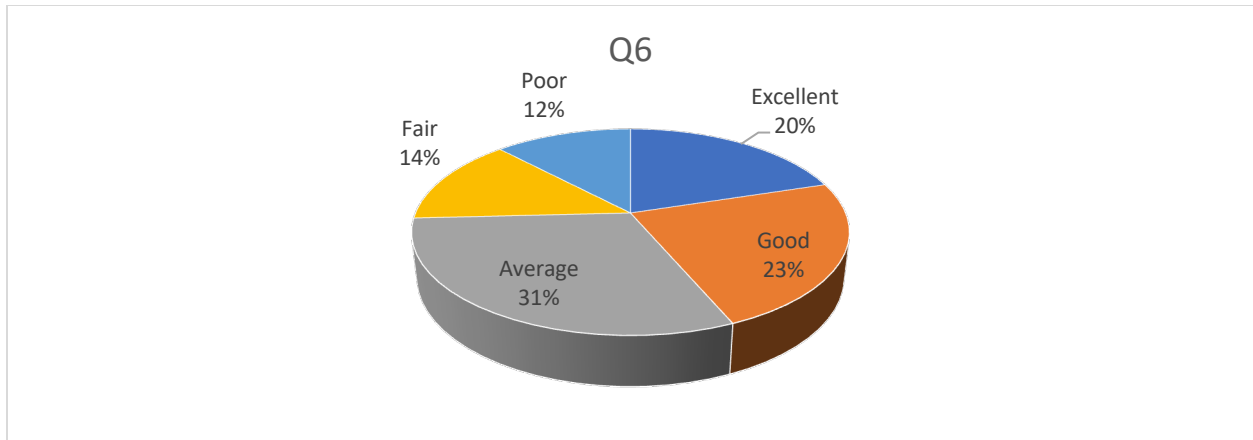
**Figure 10.** The level of salary/revenue affected during the pandemic

According to Figure 11, most of the participants (40%) were dissatisfied with the aid provided by the government during the pandemic. 36% was neither satisfied nor dissatisfied with the support provided.



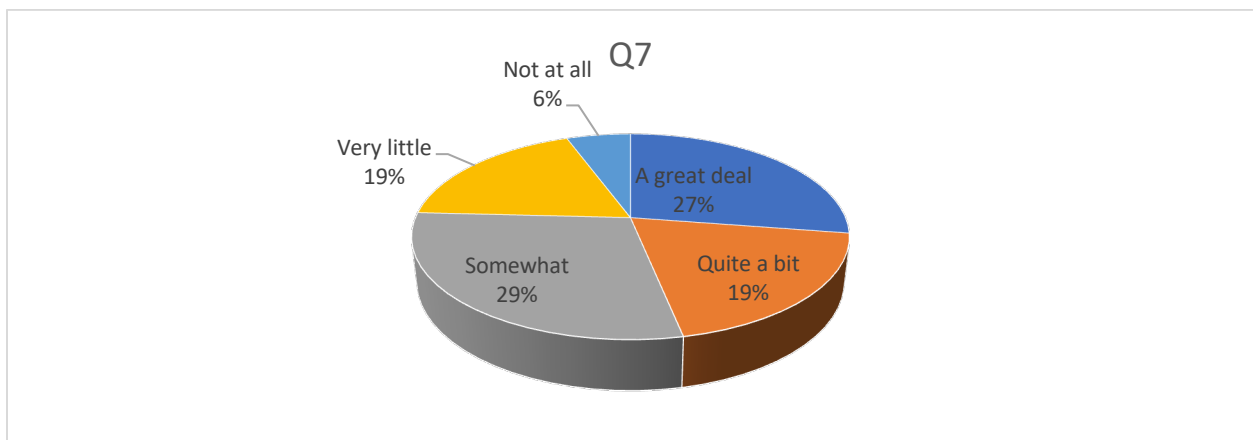
**Figure 11.** Satisfaction with the aid provided by your government

Figure 12 shows that 43% of the participants' companies successfully adapted digitally to the pandemic conditions. However, it should be noted that 26% struggled to adapt digitally.



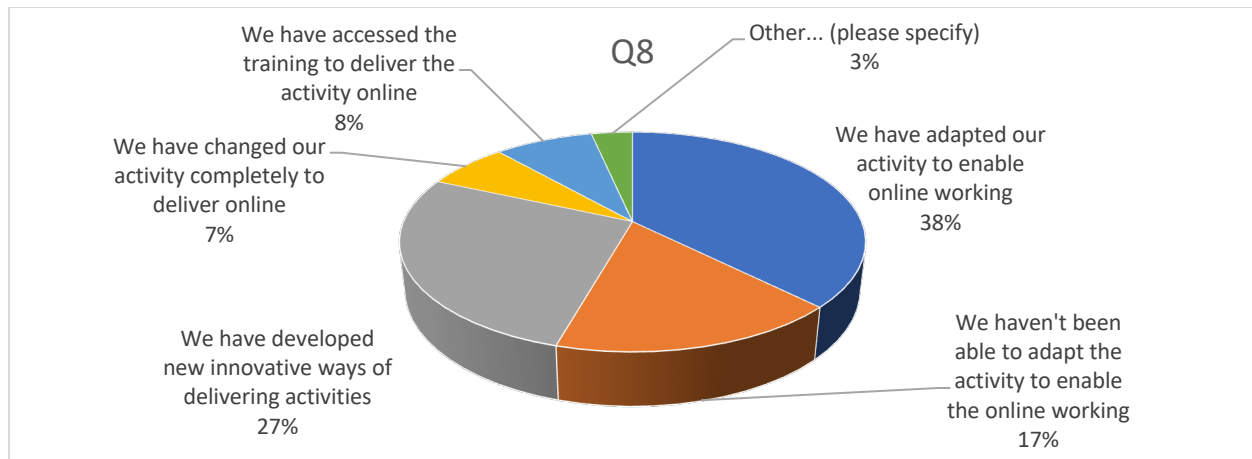
**Figure 12.** Your/your company's digital adaptation during the pandemic

Figure 13 shows that the COVID-19 pandemic affected almost half of the participants' business activities.



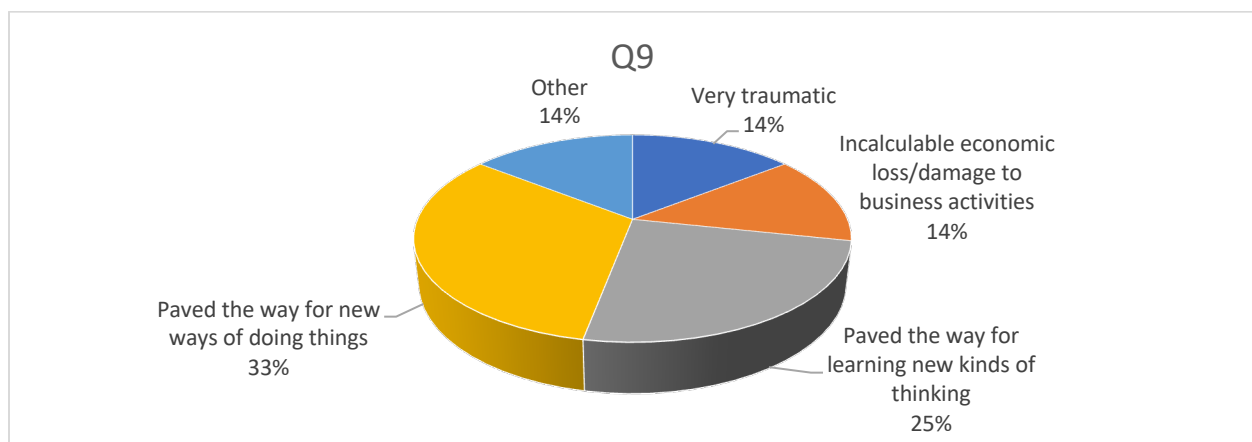
**Figure 13.** How Covid-19 Pandemic affect your activity

Figure 14 shows that ...



**Figure 14.** The changes in your activities due to the Covid-19 Pandemic

Figure 15 shows that the discontinuity in the work of the participants' sector/company led to positive outcomes such as "new ways of doing things" (33%) and learning new kinds of thinking (25%). However, the pandemic posed incalculable economic loss/damage to business activities (14%) or it was a very traumatic (14%) experience for the companies.



**Figure 15.** How discontinuity in the work of your sector/company affect you as a professional during the pandemic

## 5.2. Qualitative Findings

Three superior themes were emerged from the qualitative data collected from the participants in six different countries across Europe. The themes are (1) entrepreneurship, (2) digitalization, (3) the effect of COVID-19 pandemic.

### 5.2.1. Entrepreneurship

The participants were asked to define cultural and creative entrepreneurship, most of the participants thought that entrepreneurship is creation of new things, promoting oneself, making things profitable and accessible, and *"the ability to align business aspects with a cultural and/or creative proposal"* (P6, 43, F, Project Manager, Italy).

*"it is to create something new and that should be appreciated by the sector itself and by its consumers, I mean the people in general. For example, you establish any specific activity of business in the cultural and creative sector, let's take our business as an example. You bring to market new products and services and of course these should have the potential to generate financial revenues."* (P1, 43, M, Graphic Designer, France)

*"...lack of such skills and they may need help in promoting themselves and their work."* (P7, 27, F, Freelance Illustrator, Cyprus)

*"...all the actions that make culture and creativity more accessible to as many people as possible, as well as the actions, ways and means by which they become more profitable."* (P3, 51, F, Music Teacher, Bulgaria)

In addition, participants were asked to define the ways in which their work could be promoted. Necessary skills mentioned by participants ranged from digital skills, networking and communication skills, social media skills, human resources, business skills, interpersonal skills, to audience engagement skills.

*"They need to be more flexible and adaptable to new ways of communicating. They need to start using social media to a greater extent, because young people get the most information from them. It is also important to train and use different platforms in which they can promote their creativity as advertising."* (P3, 51, F, Music Teacher, Bulgaria)

*"Events are a good way for artists to promote their work especially community events or B2B or B2C trade shows and exhibitions"* (P5, 33, F, Working in Event Industry, Ireland)

*"...to have an open approach to learning about communication, marketing, organization, use of social media, audience engagement and so on. Acquiring a mastery of multimedia languages and knowing how to manage communication, especially digital communication, enables them to reach a wider audience through reasoned paths to building their own identity"* (P6, 43, F, Project Manager, Italy)

*"...there has been a big change recently (about 5 to 7 years ago), the students are much more familiar with social networks than the teachers. For example, Instagram is the most used network"* (P2, ?, F, Director of a Cultural Cooperation, France)



*"To me, artists should stop thinking in a self-centered way and try to be constantly informed, to be open - minded and to follow the developments not only in their field but also what is happening in the world in general." (P4, ?, F, Teacher, Greece)*

Participants felt that by possessing the above skills, CCI employees would also improve their employability.

To have such skills, CCI workers should receive tailored courses or training to develop their skills. Participants from different countries indicated different training content and needs. French participants mentioned self-motivation, Cypriot participants mentioned social media, marketing, financial and digital skills, and Bulgarian participants mentioned entrepreneurship, communication, and project management as important skills. Similarly, Italian participants cited financial skills, educational skills, entrepreneurial skills, IT skills, teamwork skills, and project management skills. Irish participants referred to project management, communication, and digital marketing skills, while Greek participants emphasized that they take a very clear approach to communicating a step-by-step process of their work to their audience.

### 5.2.2. Digitalization

Digitalization is one of the most important trends in the cultural and creative sector across European countries. It is changing the way we create, consume, and share culture and creativity.

In this regard, we asked the participants from six different countries about the digitalization of their businesses in order to assess the impact. Most of the participants stated that digitalization changed everything around us, leading to major changes in all aspects of life including the CCS.

*"...digitalization changed everything in which we communicate, interact, and engage with one another. It also improved access to services and enhanced our connectivity. It transformed our societies. More importantly, it supports our economic growth by generating business and employment opportunities" (P1, 43, M, Graphic Designer, France)*

*"The last decade has seen a growing phenomenon of digital transformation in all areas of cultural and creative production." (P6, 43, F, Project Manager, Italy)*

Few participants drew our attention to positive and negative impacts of digitalization in CCS. In terms of positive effects, participants remarked various significant contributions of digitalization such as popularity of the artists, reaching the audience easily.

*"I believe that digitalization has an impact on artists' visibility. Artists now can promote their work much easier, faster, and effective." (P7, 27, F, Freelance Illustrator, Cyprus)*

*"It has extended the audience reach and promotes inclusivity by transferring text and pictures into a digital format." (P5, 33, F, Working in Event Industry, Ireland)*

*the digitization of cultural and museum heritage and the increase in the production of digital content, allowing for a broadening of audiences and experimentation with new ways of remote access" (P6, 43, F, Project Manager, Italy)*

*"Through our forced adaptation, we were given the opportunity to communicate our art around the world, for example I was known by people in America while I was in Larissa (Greece). I am now able to take classes online without affecting the proper completion of my work. I basically found another way and adapted to the new conditions." (P4, ?, F, Teacher, Greece)*

*"the creative use of digital tools increases revenue growth, workplace productivity, and competitiveness while fostering innovation and employment throughout the economy. All in all, digital skills have become a key element for facilitating employment opportunities. ... We are interested in this digitalization because it is a space to approach for critical thinking or to confront one's art and find one's path as an artist in these digital behaviors." (P1, 43, M, Graphic Designer, France)*

*"Digitalization has influenced CCS on the one hand in terms of the way information is disseminated, on the other hand in creating the works of art themselves. For example, in music, more and more digital programs are used in composing, with the help of which many different instruments can be added (which saves time, money, effort and people) and at the same time through these programs you can listen to and adjust the party. the individual instruments, as well as the overall sound of the work." (P3, 51, F, Music Teacher, Bulgaria)*

One of the participants shared her account about a makeup artist, which clearly depicts the effect of rapid digitalization on the artist.

*"Many people consider them [makeup artists] not being artist like the rest of us. I am not sure if this is an effect of rapid digitalization, or it is since most of them focus on the beauty aspect. MUAs managed to use social media to promote their work very successfully. I remember my mother 15 years ago when she wanted to get a makeup, she was going to the same MUA who was located at her hairdresser's salon. She was always complaining about this MUA's work. Few were the times that she liked what he did. But due to the lack of social media she knew no one else to visit. Since social media's outbreak MUAs became very successful by promoting their work correctly. If my mother or anyone else wants to change their MUA, the only thing to do is to open Instagram or TikTok and search for a new MUA." (P7, 27, F, Freelance Illustrator, Cyprus)*

While some participants underscored the positive impacts of the digitalization, rest indicated the negative sides.

*"The big change is in social networks, such as Instagram or Pinterest, because they are becoming the center of artistic research and, as a result, art history is being undermined by these networks, which are becoming the reference or the reference tool for research, to the point of questioning or even challenging the advice and proposals of the teachers and artists involved." (P2, ?, F, Director of a Cultural Cooperation, France)*

*"The problem here is that people in Cyprus are not aware and not interested too." (P7, 27, F, Freelance Illustrator, Cyprus)*

To challenge the rapid digitalization, the CCS responded and adjusted itself in several ways. Participants stated that they increased working hours; tried to motivate their employees; and support them by providing training.

*"We provide computers equipped with up-to-date creative software to all the students, which they can buy at the end of their schooling, and we have a team that manages the evolution of digital tools, which monitors developments and updates the tools accordingly." (P2, ?, F, Director of a Cultural Cooperation, France)*

*"As far as my current work situation is concerned, the languages and tools for dialogue with the target group of our initiatives are constantly adapted to technological and social changes. In the same way, both the project lines of action and the communication channels are adapted according to the needs of the sector." (P6, 43, F, Project Manager, Italy)*

*"I first must provide them with the necessary motivation to engage with arts. Sometimes this can be through the projection of videos to the students, sometimes it can be entirely away from any digital tool." (P7, 27, F, Freelance Illustrator, Cyprus)*

However, a participant from Bulgaria stated that the digitalization is not yet fully developed in the country.

*"...the process of digitalization in Bulgaria is still poorly developed. Educational and cultural institutions generally lack training with such a focus. There is still a lack of trained specialists to train young professionals." (P3, 51, F, Music Teacher, Bulgaria)*

### 5.2.3. The effect of COVID-19 pandemic

The effects of the pandemic in Europe will persist for years across that region. The most productive sector has been heavily impacted by event cancellations and the decline of tourists, due to a lack of safety measures. This is deeply damaging for European economy as a whole. In this regard, we asked the participants to discuss the effect of COVID-19 both economically and professionally. Most of the participants faced common challenges such as follows:

*"We increased the time we allocate to work. We continued to provide services at prices below the cost. We tried to survive with creative ideas suitable for the pandemic" (P2, ?, F, Director of a Cultural Cooperation, France)*

*"For many months I had to cancel the lessons that I was teaching in the school. Since many students are at the ages of 5 or 6 and they may not be familiar with laptops, tablets, zoom, skype, etc. they could not attend our classes. This meant that a significant part of my income had been shortened. For a few who could still attend the classes, I had to adapt the teaching methods. This meant that many students had to transfer the workshops to their own places. This was the most challenging part professionally, to keep the students motivated even though they were not in a place that reminded them of our atelier." (P7, 27, F, Freelance Illustrator, Cyprus)*

*"I would like to point out that digitalization is not always useful. For example, during the pandemic we had to teach art online. I do not think this was appropriate and useful in our case. It is difficult to teach dance this way." (P3, 51, F, Music Teacher, Bulgaria)*

*"I was reduced to a 4-day work week." (P5, 33, F, Working in Event Industry, Ireland)*

*"The emergency has changed work rhythms and patterns, resulting in a reduction in personal income and purchasing power, and compromising the possibility of professional mobility within the sector." (P6, 43, F, Project Manager, Italy)*

*"Children were in front of a computer all day because of school activities, therefore a lot of parents refused to allow their children to sit in front of a screen in order to attend a dance class. They could not understand that the child is not a passive receiver but is watching the teacher and participating by copying the movement. On the other hand, those children who participated in the class by having at least online contact with the fellow dancers felt the revitalization and socialization that dance delivers." (P4, ?, F, Teacher, Greece)*

However, one participant from France indicated that their high digital skills and readiness did not badly affect their response to COVID-19 pandemic.

*"What was great was that we were ready because teachers and students were already equipped, we didn't stop the pedagogy, we were even able to give the diplomas, which was not done without efforts to adapt and invent a few tricks for the 100% online. Then half in video and half in workshop for the 2nd confinement in 2021."* (P2, ?, F, Director of a Cultural Cooperation, France)

Another important aspect to assess the negative impact of the COVID-19 pandemic, we asked the participants about how pandemic affected the business model in CCS.

*"The fact that not enough financial support provided by the state in this regard has put a lot of pressure on us. We got staff support. We received part-time work support. With the VAT reduction, However, its positive effect was very limited."* (P1, 43, M, Graphic Designer, France)

*"COVID 19 has really damaged the finances and the enthusiasm for practice."* (P2, ?, F, Director of a Cultural Cooperation, France)

*"The unfortunate thing is that not many museums and facilities in Cyprus have adapted to the new reality. I have seen perhaps 1 or 2 museums digitalizing their exhibitions and providing online tours. And these museums are the two most famous ones in Cyprus. The rest of the museums, and specifically the state-funded ones had shut down and remained closed, up until a year ago. The saddest thing is that since adult people are not interested in visiting museums, the state funded museums have usually 3-4 employees and they do very little promotion."* (P7, 27, F, Freelance Illustrator, Cyprus)

*"...the pandemic has had a very bad effect on people with creative professions, especially for those involved in performing on stage. Still, people were trying to adapt. They were looking for new ways to implement. Some of them used the time to write books, others created music, others organized and conducted online concerts, theatre productions, etc."* (P3, 51, F, Music Teacher, Bulgaria)

*"All were events cancelled or postponed."* (P5, 33, F, Working in Event Industry, Ireland)

*"With regard to the organization of work, human resources and activities, there has certainly been a shift in weight and balance. Objectives have changed, but also the instruments for achieving them. For a long period of time, opportunities for face-to-face relations were interrupted and thus interpersonal exchanges were compromised, if not mediated by technology. This has certainly complicated strategic planning and operations. Moreover, while there have been savings due to low mobility and the reduction of some costs, there have been fewer opportunities to raise funds in the light of the economic crisis affecting the cultural sector. Most of the activity was carried out by the staff in smart working modality*

*(compulsory by law during the emergency period), the offices were closed for long periods or with limited access, which certainly affected the dynamics of relationships but also the organization of daily work. With regard to ongoing projects, all operations have shifted to the digital and remote level.” (P6, 43, F, Project Manager, Italy)*

*“However, given the possibility of the unexpected there is a tendency for flexibility. In my own case this adaptability has helped immensely. For example, if someone is ill or for some reason has not been able to be physically present in class, he/she connects online and attends the class. Moreover, by using a large screen that I have placed in the dance hall there is a sense of physical presence even though it is absent.” (P4, ?, F, Teacher, Greece)*

## 6. CONCLUSIONS

The current state of the cultural and creative sector across European countries is one that is in a constant state of flux. With ever-changing funding structures, it can be difficult to keep up with the latest developments. However, by working together and sharing information, we can ensure that the sector remains strong and vibrant. In this regard, this report aimed at presenting a general overview of cultural and creative sector including education, employment, economic growth, the effects of COVID-19 pandemic, challenges, and opportunities, required skills and digitalization across all cultural and creative sectors.

Our discussion centered upon entrepreneurship, digitalization, and the effect of the pandemic while discussing the CCS across Europe.

There is no doubt that entrepreneurship is a key driver of innovation and economic growth. And the cultural and creative sector is no exception. Across Europe, there are many examples of entrepreneurs who have taken an idea and turned it into a successful business. In recent years, there has been a growing interest in the role of entrepreneurship in the cultural and creative sector. This is due to the recognition of the sector's potential for economic growth and job creation. In addition, the cultural and creative sector is well-suited to entrepreneurship because it is often based on individual creativity and innovation. There are many challenges associated with entrepreneurship in the cultural and creative sector. For example, many cultural and creative businesses are small and medium-sized enterprises (SMEs) which can lack the resources of larger businesses. In addition, the regulatory environment for cultural and creative businesses can be complex, with different rules applying in different countries. Despite these challenges, there are many opportunities for entrepreneurship in the cultural and creative sector. For example, the internet and digital technologies have created new opportunities for businesses to reach a global audience. In addition, there is a growing appetite for new and innovative products and services, which provides a great opportunity for entrepreneurs.

Secondly, digitalization is one of the most important trends in the cultural and creative sector across European countries. It is changing the way we create, consume, and share culture and creativity. Digital technologies are making it easier for people to access and create cultural content. They are also changing the way we interact with each other and with the cultural institutions that produce and curate culture. Digitalization is having a profound impact on the business models of cultural organizations, as well as on the employment prospects of those working in the sector. The cultural and creative industries are undergoing a period of major transformation, and Europe must adapt if it is to remain a world leader in this field. The European Commission has published a report on the current state of digitalization in the cultural and creative sector across Europe. The report highlights the need for greater investment in digital infrastructure and R&D, as well as for more support for SMEs operating in this field. It also calls for greater cooperation between Member States in order to ensure that Europe remains at the forefront of digital innovation in culture and creativity. This is the motivation that this project stemmed from.

Lastly, the pandemic has had a devastating effect on the cultural and creative sector across European countries. The sector has been hit hard by the closure of cultural venues, the cancellation of events and the loss of tourists. The impact of the pandemic is expected to be long-lasting, with many businesses struggling to survive. The cultural and creative sector is a vital part of the European economy, and its recovery will be crucial for the continent's future.



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