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4H-CREAT

Cultural and Creative Industries in the Atlantic Area: Mapping composite report

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ATLANTIC AREA PROGRAMME 2014-2020



Cultural and Creative Industries in the Atlantic Area:

Mapping composite report

Contents

4H-CREAT Project summary

4H-CREAT Mapping composite report

Introduction

Mapping report: Scotland

Mapping report: Ireland

Mapping report: France (Pays de la Loire)

Mapping report: Spain (Asturias)

Mapping report: Spain (Andalucia)

Mapping report: Portugal (Lisbon)

Mapping the CCIs in the Atlantic Area: findings and analysis

Summary



4H-CREAT: project summary

4H-CREAT is a €1.3 million ERDF funded Atlantic Area project comprising seven partners from across the Atlantic region. Glasgow Caledonian University is lead partner for the project. 4H-CREAT aims to generate transnational knowledge transfer models to enhance the sharing of results from research institutions to the Cultural and Creative Industry (CCI) SME's by developing innovative products through a transnational Quadruple Helix cooperation approach (end-user involvement and co-design). It will identify new products and services orientated to the new trends in market demand (i.e. Transmedia), by exploiting digital technology and economy. The partnership of the 4H-CREAT project includes lead partner Glasgow Caledonian University (Scotland), Limerick Institute of Technology (Ireland), Laval Technopole (France), Quimper Technopole (France), City of Aviles (Spain), University of Lisbon (Portugal) and CAMARA Seville (Spain).

4H-CREAT mapping composite report

The mapping composite report forms part of Action 2 of work package 4 (Development of transnational knowledge)

Action 2 Mapping of resources

Under the coordination of Glasgow Caledonian University (GCU), each partner will work at local level to gather homogeneous data on the existing resources within their respective territory, enabling a quadruple helix cooperation in the framework of the cultural and creative industries. The resources should cover the whole value-chain of the different subsectors, including innovation agents and actors; creators, SMEs, clusters and productive services; distribution and exhibition and, where available, consumers-linked data.

Deliverables: 4H Resources of the Atlantic Creative and Cultural Industries

Database and mapping of the existing resources of the partners' territory, following a same matrix to be developed by GCU and agreed with the partners, including basic homogeneous data useful to develop transnational cooperation among stakeholders. Joint mapping and knowledge on existing resources. Specific homogeneous knowledge and diagnosis on issues of interest to develop cooperation among 4H stakeholders, such as: Subsector, services, existing offer, equipment, human and innovation capacity, international experience and capacity, etc. A composite report on the mapping of resources across the areas /regions of 4H-CREAT partnership.



Introduction

Mapping exercises provide an overview of the situation and valuable data for creating strategies. However, the mapping of CCIs has proven to have more effects than purely statistical outcomes. Mapping is a tool for awareness-raising, both for the cultural and creative sectors taking part in the exercise, public institutions as recipients of the result and general public. Mapping also helps to create networks of cultural and creative institutions, organisations and companies being involved in the mapping studies. The process is a basis for policy formulation with the mapping study consolidating the use of definitions and terminology and creating common space for public discussion.

Defining creative and cultural industries

Creative industries are those that have their origin in individual creativity, skill and talent. They also include industries that have the potential to create wealth and job creation through the development, production or exploitation of intellectual property. Cultural industries can be defined as those industries which produce tangible or intangible artistic and creative outputs, and which have a potential for wealth creation and income generation through the exploitation of cultural assets and production of knowledge-based goods and services (both traditional and contemporary). It should be noted that the cultural and creative industries embody value that extends beyond any attributable monetary or commercial value, and hence they remain distinct from other industries and cannot be reduced to an exclusive commercial or market-specific orientation. Very often the definitions of creative and cultural industries are interchangeable. For the purposes of the 4H-CREAT project, the two sectors are combined to comprise 24 distinct industries as highlighted in Table 1.

Table 1: Creative and Cultural Industries

Advertising	Digital arts	Photography
Architecture	Events/festivals	Social media influencers
Apps development	Fine arts, antiques, sculpting	Tech designers
Broadcasting (TV and Radio)	Gaming/animation	Theatre
Crafts	Graphic design	Video, audio and film
Creative cooking	Museums and galleries	Virtual reality
Dance	Music	Web design
Designer fashion	Orchestras/conservatoires	Writing and publishing

The mapping template comprised a series of sections for partners to work through by selecting from a range of answers. The template started with the name of the organisation, country, region and city. This was followed by the 4Helix profile of the organisation including private sector, public sector, university/research, civil society and social enterprise. This was designed to offer respondents a broad range of options where CCI actors typically operate. Respondents could then select from the list of 24 CCI sectors that linked to their choice of organisation.

Much of the interest in the mapping process lay in the identification of the value chain activities of the chosen organisations in the CCIs. In particular, the four main elements of the value chain comprising content creators (creators of ideas, concepts and holders of intellectual property), content producers (developers of intellectual property and programme content), content distributors (suppliers of intellectual property and managers of distribution platforms), and end users (determines value and experience of consuming CCI outputs of products and services). A further choice was made to reflect the activity of those organisations that acted as facilitators or intermediaries in the supply chain of CCI products and services.

The mapping also contained options for detailing the website of the organisation and the use of social media. The final parts of the survey consisted of details of when the organisation was established, number of employees, the product/service/activity competence offered and if it is active internationally. Overall, the survey offered data on the type and the organisational characteristics, sector of the CCI in which it operates, supply chain role, value adding activities, main competences and international reach. Although the survey is not intended to be a comprehensive account of key players within each of the CCIs, it does offer enough scale and scope to facilitate analysis and insight into trends and characteristics evident within each of the partner regions or countries and to provide scope for comparisons to be made between those regions and countries. This report provides a composite of the data and information gained from the survey and will present analysis and findings from each of the partners before ending with a summary commentary of the findings from across the Atlantic Area.

Mapping report: Scotland

Overview

The agency which leads on support for the creative industries in Scotland is *Creative Scotland*, which was established by the Scottish Government in July 2010, taking over the functions and resources of *Scottish Screen* and the *Scottish Arts Council*. *Creative Scotland* was also given responsibility for the “creative industries” more broadly, and in particular the task of promoting and supporting commercial activity focused on the application of creative skills. Its purpose is to support the development of the arts, screen and the creative industries across all parts of Scotland. Creative Scotland coordinates Scotland’s *Creative Industries Partnership (SCIP)*, which is made up of the *Scottish Government*, *Scottish Enterprise*, *Highlands and Islands Enterprise*, *Skills Development Scotland*, the *Convention of Scottish Local Authorities*, the *Scottish Funding Council* and *Scottish Development International*.

The UK and Scottish governments each produce their own figures for the number of people employed in the creative and cultural industries in Scotland. The Scottish Government puts the figure at 71,000, while the UK government estimate is 102,000. The UK government also produces figures for the ‘creative economy’ which includes creative workers who are not employed by a creative enterprise. The UK government puts the number of people employed in Scotland’s creative economy at 174,000. These differences are largely down to the different definitions used by the UK and Scottish governments, but there are a number of other issues with assessing the scale of the creative industries in Scotland including the relatively small size of many creative enterprises in Scotland where data on employment and economic factors are not always captured and recorded.

Scotland has developed particular expertise in sector development support for the creative industries with well-established organisations that benefit from a closely integrated community of small businesses, creative organisations and individuals. In terms of networks, *WASPS* provides a large network of 17 studio complexes across Scotland that house a wide range of creative businesses with over 800 tenants. In addition, the *Cultural Enterprise Office (CEO)* provides business development support for creative practitioners and micro-businesses, while *Arts and Business Scotland* acts as a conduit between the cultural and business sectors, helping to nurture creative, social and commercial relationships. There are also a series of independent creative area networks such as *Creative Dundee*, *Creative Edinburgh* and *Creative Stirling* that focus on their own distinctive aims and objectives. Although each of these area networks has comparators elsewhere, they operate in a specific Scottish context that helps them to develop methodologies and expertise specific to their area context. The creative and cultural industries in Scotland are a growing and important part of the economy creating jobs and delivering high quality outputs that attract customers from home and abroad. The Scottish government has been proactive in supporting the sector but significant challenges remain in terms of competitiveness in global markets, attracting and retaining creative talent and delivering the investment to capitalise on the innovation and creativity that underpins the success of the sector.

Mapping report: findings

There were a total of 100 responses to the questionnaire by Scottish companies in the CCI sector. The majority of companies were small scale creator of producers of creative outputs. The sample consisted of organisations from five different industry sectors as illustrated in Figure 1. There were 80 private sector organisations included; 6 civil society; 4 social enterprises; 8 public sector and 2 universities. The sample is representative of the overall distribution of organisations across the five sectors in Scotland with the private sector dominating. Although the public sector plays an important role in delivering support and funding for the CCIs, their role is not one of producing products or services. However, for many of the cultural activities such as music orchestras, dance and ballet, the public sector delivers support that the private sector would be unable or unwilling to do.

Figure 1: Sample by industry sector in Scotland

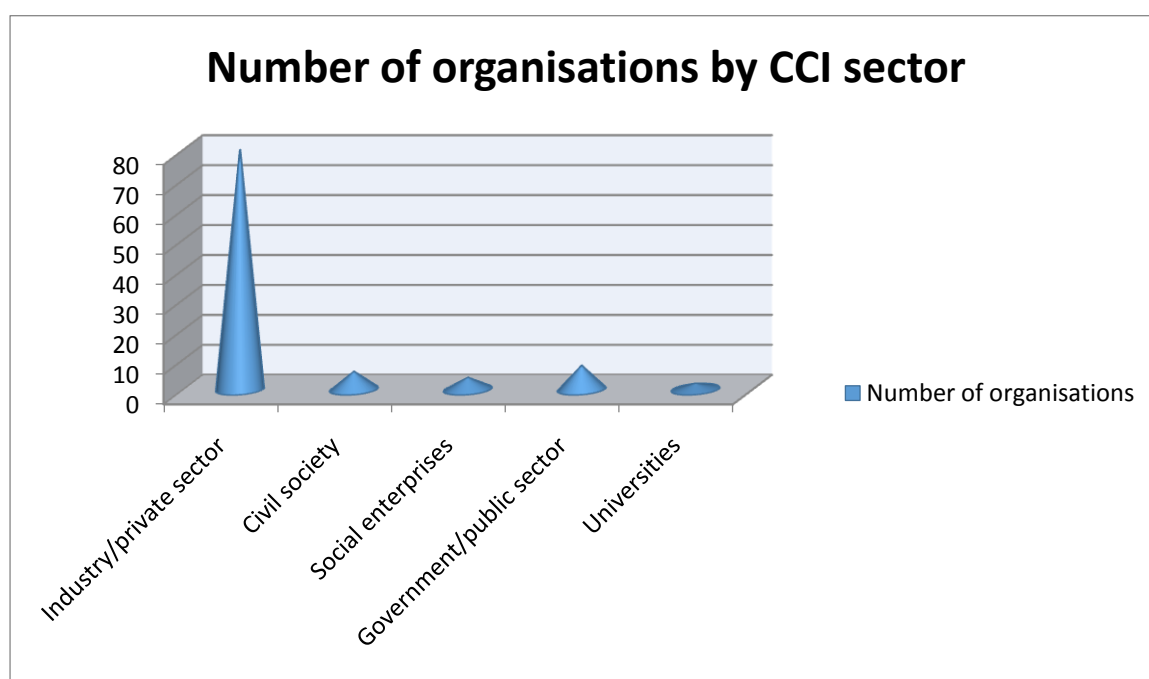


Table 1 illustrates the breakdown of firms involved in a range of CCI activities in the survey. In Scotland the gaming industry has also attracted new entrants with micro or small scale businesses creating content for this high growth market. Publishing is another activity that has been transformed by the internet with increasing numbers of writers and publishers accessing the medium for creating and distributing content or delivering bespoke and highly specialised services for others along the supply chain of publishing. Advertising is another activity that provides opportunities for small firms to deliver a range of products and services that help promote and market products across a range of client industries. One of the most vibrant of the CCI sectors is that of theatre with a range of large-scale venues as well as many small scale and community theatre groups proliferating across the country.

Table 1: Cultural and Creative Industry activities in Scotland

Activity	Number of firms
Advertising	8
Architecture	2
Dance	1
Digital arts	2
Events	4
Fashion	3
Fine arts	4
Gaming	19
Graphic design	5
Museums	3
Music	5
Theatre	10
TV/radio	5
Video/audio	6
Web design	7
Writing/publishing	16

Figure 2 illustrates the size distribution of the sample firms by employment. The survey showed that 38 of the 100 companies who responded had less than 5 employees with a further 21 having between 6-10 employees. In the sample a total of 59% had less than 10 employees making the sector predominantly populated by small or micro-sized companies. There were 2 large companies with more than 250 employees (one was a printer/publisher and the other a broadcaster and content delivery company). One company had between 100-250 employees and 4 had 31-50 employees. The sample demonstrates that the vast majority of companies operating in the CCIs in Scotland are small scale firms offering bespoke services or content.

The CCIs in Scotland has traditionally had a large number of small scale enterprises making up the total number with only a few having over 30 employees. This reflects the nature of creativity and innovation across the sector with smaller businesses being able to specialise in specific types of outputs that are of high quality and high value. The CCI sector in Scotland generates a significantly higher GVA in relation to the average number of employees making it an attractive source of products and services for a wide range of clients. Consequently, the sector exhibits high levels of entrepreneurship and small start-up companies. Agencies such as Scottish Enterprise and the Innovation Centre have been proactive in encouraging and supporting small business across the creative and cultural industries in Scotland. Universities and research centres are similarly actively engaged in delivering support, training and incubation services for a range of small scale businesses across the sector.

Figure 2: Company size by employees in Scotland

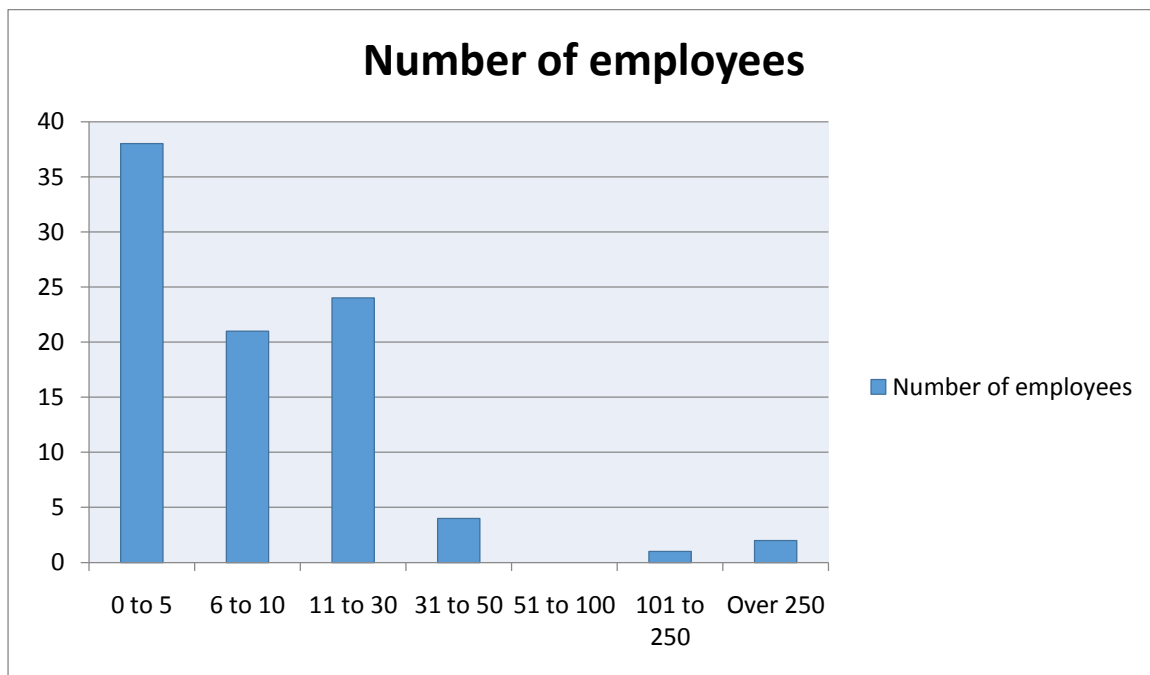
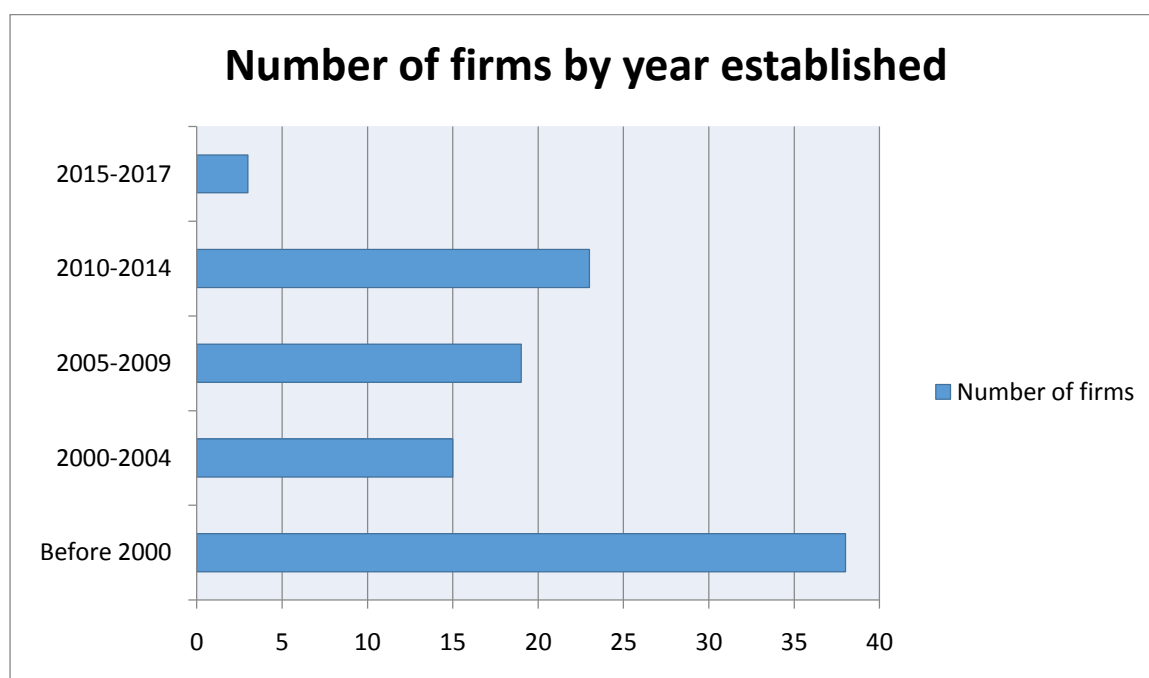


Figure 3 illustrates the number of firms linked to timeframes when they were established. The data clearly shows that the majority were operational prior to the year 2000 with 38 being registered in this category. However, there has been a steady increase in firms being established from 2000 to 2014. The data shows 15 for the years 2000 to 2004, 19 for 2005 to 2009 and 23 for 2010 to 2014. Although the final category only covered two rather than four years, there is a significant drop-off in the number of firms being established in 2015 to 2017 with only 3 being registered in the sample of 100. Many of the firms have been established for over twenty years suggesting that opportunities for entry into the CCI sector by SMEs have been evident since the digital revolution of the 1990s. From the sample it is clear that the CCI sector has a history of attracting small scale enterprises and that the numbers being established have been growing since 2000 through to the period 2015-2017.

The majority of firms in the survey are engaged in content creation and content production. In some instances, small firms are solely content creators or content producers but overwhelmingly these activities are usually carried out in tandem with over 70 firms recording this in the survey. A further 17 were involved in facilitation and one for distribution. The findings suggest that there is scope for small scale businesses to enter and operate in the content creation and content production part of the supply chain.

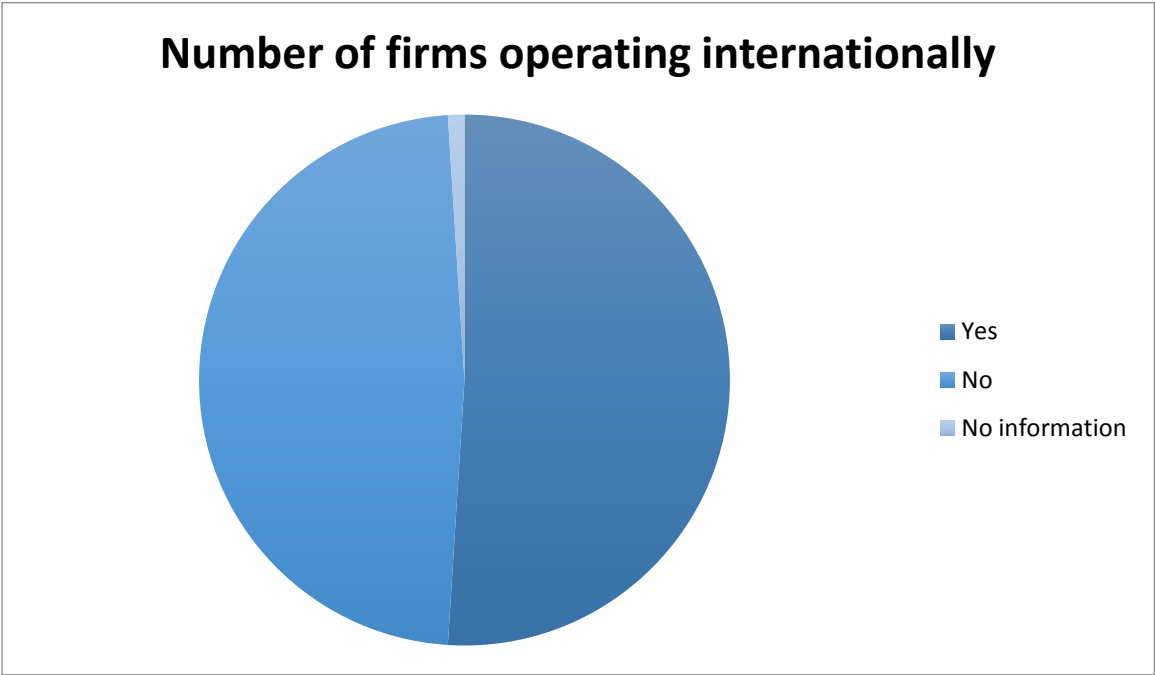
Figure 3: Number of firms by year established in Scotland



Technology has played a key role in giving more small firms access to markets as well as the tools to deliver high quality products and services for clients across the supply chain. This has been especially the case in audio and video services where access to technology has opened up the scope for small businesses to experiment, innovate and deliver added value products and services previously the preserve of large companies. The delivery of advertising services is an example of small businesses delivering specialised services to a range of national and international clients. This is reflected in the number of firms that are now active across borders with 51 firms out of 100 responding that they were engaged in international trade as illustrated in Figure 4.

The survey shows that it is possible for small scale enterprises to operate internationally and to succeed in generating revenues from both domestic and global clients. Although half of the firms in the survey noted an international aspect to their business, the data also shows that there is scope for others to extend their reach internationally. This would enhance the reputation of the CCIs in Scotland and help the sector to effect further growth in future.

Figure 4: Number of Scottish firms operating internationally



Mapping report: Ireland

Overview

The *Creative Ireland Programme* is a five-year initiative, from 2017 to 2022, which places creativity at the centre of public policy. It is a high-level, high-ambition, all-of-government initiative to mainstream creativity in the life of the nation so that individually and collectively, in the personal lives of citizens and in institutions, Irish people can realise their full creative potential. The *Creative Ireland Programme* has five implementation pillars including:

- I) Enabling the Creative Potential of Every Child
- II) Enabling Creativity in Every Community
- III) Investing in Creative and Cultural Infrastructure
- IV) Ireland as a Centre of Creative Excellence
- V) Unifying Ireland's Global Reputation

The *Creative Ireland Programme* is culture-based and designed to promote individual, community and national wellbeing. The core proposition is that participation in cultural activity drives personal and collective creativity, with significant implications for individual and societal wellbeing and development. The *Creative Ireland Programme* encourages, facilitates and supports collaboration across state agencies, organisations and local and national government, in order to cultivate a diverse, accessible and creative cultural ecosystem that sustains wellbeing for all. The *Creative Ireland Programme* is a legacy initiative, inspired by the extraordinary public response to the *Ireland 2016 Centenary Programme*. It is also the main implementation vehicle for the priorities identified in the draft policy document, *Culture 2025/Éire Ildánach*, which states that arts and culture are intrinsic to the Irish State, acknowledges the need to increase access to and participation in the arts, boost the country's creative industries and preserve Irish heritage. 2017 was the first year of the Programme and an enabling budget of €5m was allocated to its implementation.

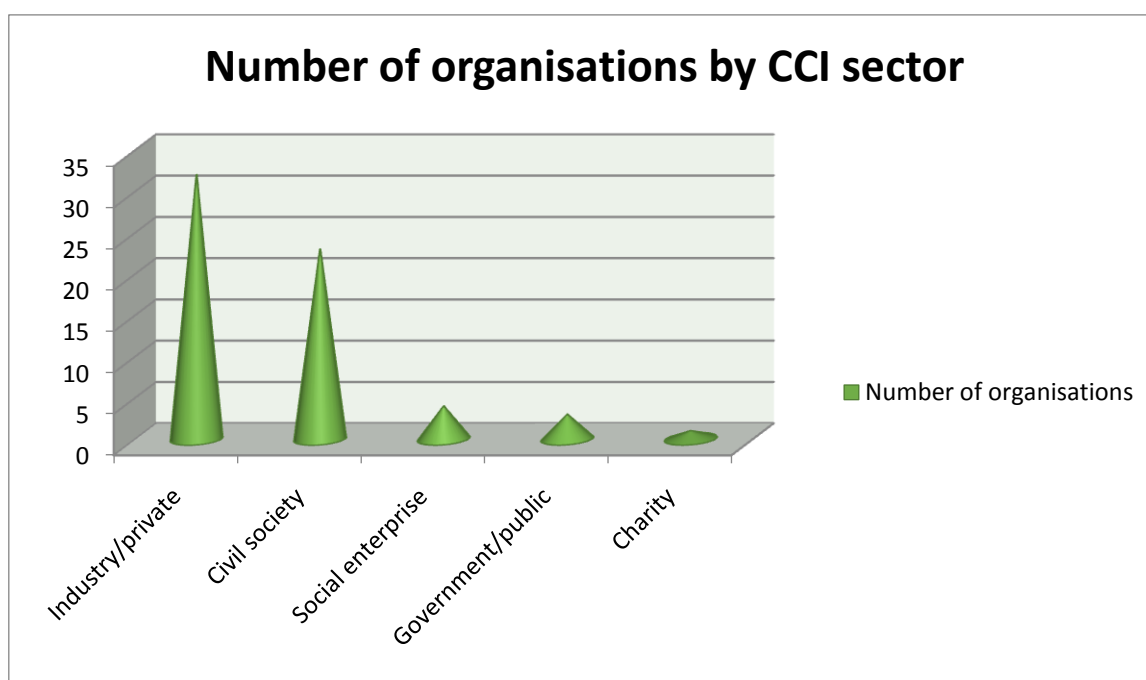
A high quality infrastructure is critical for a vibrant arts and culture sector and investment in cultural infrastructure underpins social cohesion and supports strong and sustainable economic growth. The Irish government worked closely with the *National Cultural Institutions* during 2017 to develop an overall Capital Investment Plan. This plan was developed in the context of the government's midterm review of capital expenditure and as part of the forthcoming ten-year National Development Plan. The plan was launched in early 2018. In addition, in 2017, work was carried out to develop a *Creative Ireland Programme Plan* for each *National Cultural Institution* to 2022. These plans, based on existing strategies,

set out a vision for each of the nine national cultural institutions, aligning them with the *Creative Ireland Programme* pillars and having regard to the Capital Investment Plan.

Mapping report: findings

There were 63 responses to the survey undertaken for the CCIs in Ireland with 31 featuring organisations in the Dublin area, 13 from Limerick and the remainder from across the south and west of the country. Of the 63 organisations, 32 were private sector companies; 23 were civil society; 4 social enterprises; 3 public sector and one charity. The private sector dominates the supply of CCI products and services in Ireland even though there is a great deal of civil society activity where the delivery of arts and cultural goods and services is for social benefit. Social enterprises have also emerged on to the landscape in recent years as the arts is increasingly viewed as a catalyst for change or for supporting efforts to address acute social problems in communities. Figure 5 illustrates the breakdown of the number of organisations featuring in the survey.

Figure 5: Sample by industry sector in Ireland



There were a number of different activities across the CCIs included in the survey with events, gaming and theatre being the most prevalent. The gaming industry in particular has seen a significant rise in investment and support in Ireland since the mid- 2000s with many new enterprises setting up and specific courses being run by universities and colleges in skills such as animation, software development and gaming. Small-scale enterprises also support the vibrant advertising and promotional activity for goods and services across

Ireland. Table 2 lists the number of firms engaged in CCI activities in Ireland. Most of the companies are involved in content creation and content production. Where it is often the case that these two activities work in tandem (14 companies undertook content creation and content production), in Ireland there is a majority of companies in the survey who operate as either one or the other. 17 companies were solely content creators and 5 were solely content producers. Another distinctive trend in Ireland is the proliferation of companies involved in facilitating the CCIs along the supply chain. There 38 out of a total of 63 companies in the survey that were involved in facilitation.

Table 2: Cultural and Creative Industry activities in Ireland

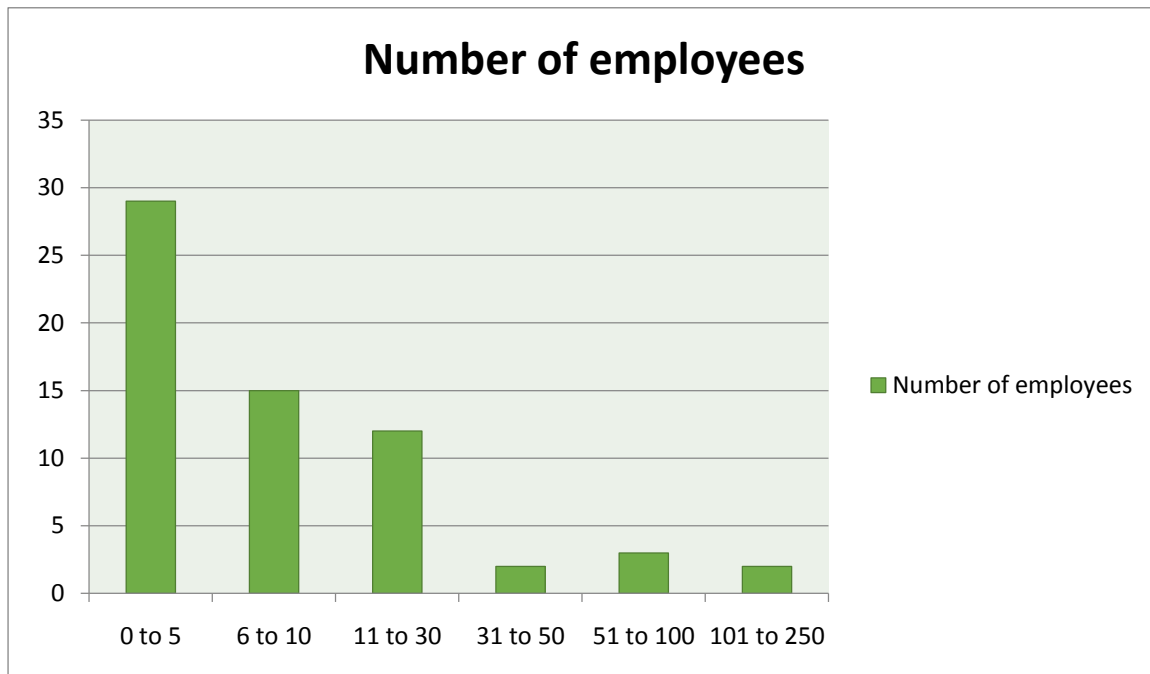
Activity	Number of firms
Advertising	5
Architecture	1
Dance	2
Digital arts	1
Events	10
Fashion	1
Fine arts	1
Gaming	10
Graphic design	1
Museums	11
Music	2
Theatre	3
TV/radio	1
Video/audio	1
Web design	3
Writing/publishing	3

There were 6 other public or social organisations that had creative and cultural activities.

The majority of companies responding to the survey in Ireland are small scale enterprises. Figure 6 illustrates the number of employees by company. Of the 63 companies, 29 had less than 6 employees and a further 15 had between 6 and 10 employees. Altogether, 70% of surveyed companies are small scale enterprises delivering bespoke or specialised products or services for sectors such as audio/visual, advertising or gaming. Only 2 companies had more than 100 employees and 3 had between 51 and 100 employees. Significantly, there were 12 companies with between 11 and 30 employees. This suggests that more firms are experiencing growth across the sector as this represents a relatively large size organisation in the CCI sector. The data suggests that the SME sector is growing in the CCIs in Ireland and that this is a reflection of the support offered by institutions and government agencies to help investment across the sector as opportunities become increasingly evident. The

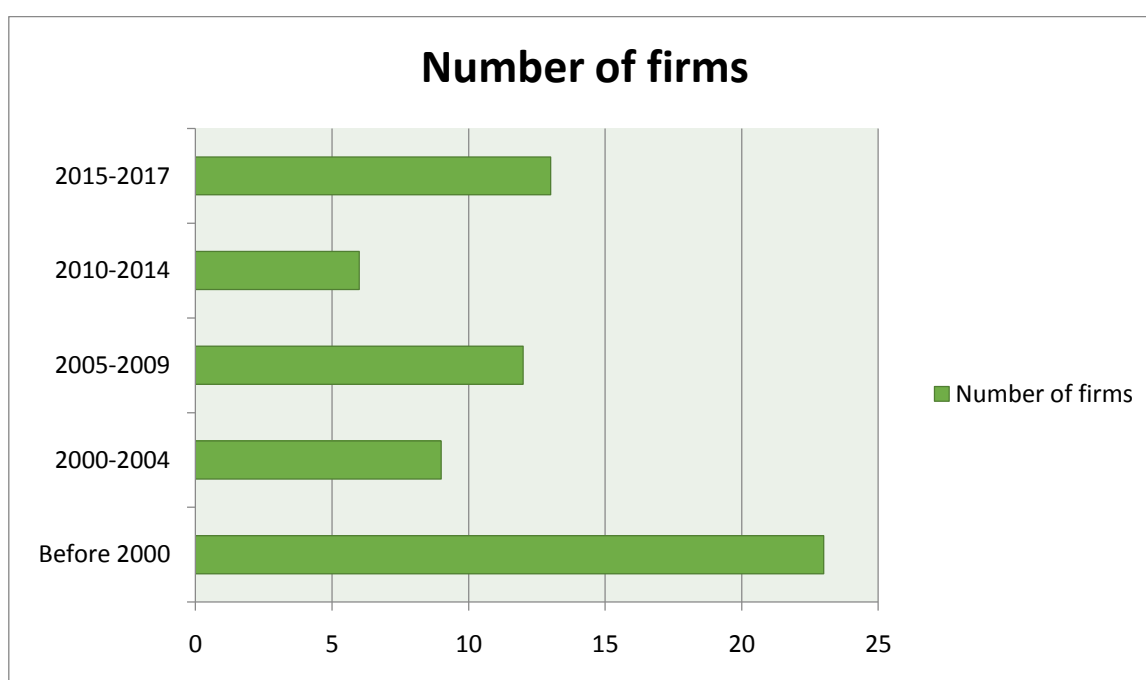
Creative Ireland Programme is an example of a distinct and targeted strategy put in place to maximise the potential of enterprises within the CCI sector.

Figure 6: Company size by employees in Ireland



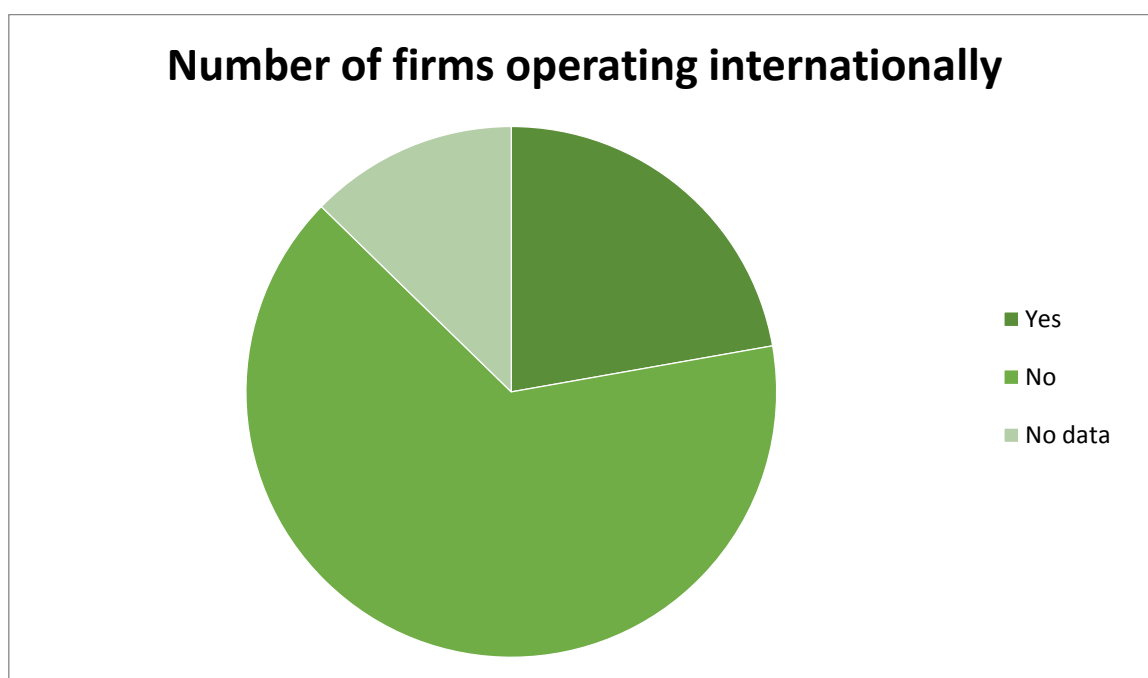
The proliferation of small scale enterprises across the CCI has been evident for a number of years as easier access and new technologies allow more entrepreneurs to operate in the sector. Figure 7 illustrates the trends in the number of firms being established across different timeframes. There has been a steady rise in the number of firms being established between 2000 and 2009 across the sector with 23 companies in the survey having been established prior to the year 2000. Although the period 2010 to 2014 saw slight decline in new firms being established, by the period 2015-2017 the situation had recovered 13 out of 63 firms being established in that period. This clearly suggests that Ireland remains a vibrant environment for setting up small scale enterprises across the CCI. The delivery of services such as in the events management sector has been particularly evident in the survey with numerous firms involved in production support, logistics, backstage, and promotional activities. This trend reflects the strong cultural environment in Ireland with music, theatre, live arts, museums and galleries providing experiences for citizens and clients alike. The *Creative Ireland Programme* is design to capitalise on this trend to help companies deliver added value products and services to a diverse marketplace.

Figure 7: Number of firms by year established in Ireland



Where the domestic market remains the focus of attention, there is scope for Irish companies to look outwards towards international markets. Figure 8 illustrates the number of firms operating internationally. From 63 firms in the sample, only 14 operated across national boundaries with 41 registering that they did not operate internationally. A further 8 gave no data leaving the possibility that over 75% of companies surveyed did not operate outside Ireland. This suggests that many companies are missing out on market opportunities and that more needs to be done to reach out to global customers for products and services. The overall trends for Ireland demonstrate a general increase in the number of firms entering and competing effectively across a range of activities in the CCI with small scale enterprises dominating. There is evidence of activity extending beyond content creation and production to incorporate the service sector and especially that of facilitation. It is necessary for Ireland to more fully engage with opportunities in EU and global markets. The Creative Ireland Programme is an important strategic plan to address some of the issues that are relevant to growing the CCI in Ireland and features specific aims for increasing the reach of the sector beyond domestic markets to further exploit Ireland's global reputation in a number of creative and cultural activities. The implementation of the strategy will be the critical phase in the development of the CCI in Ireland as the intension is not only to deliver the infrastructure that supports the growth of the sector but also to help exploit the talent to deliver truly excellent products and services on a global scale.

Figure 8: Number of Irish firms operating internationally



Mapping report: France (Laval)

Overview

The French phrase "cultural industries" commonly refers to the content that industries produce, that is, the goods and provide services based on prototypes and which are reproducible, and to the transmission and distribution industries such as publishing (books, press, records, computer games etc), broadcasting (cinema, video, television, radio) and information departments of news agencies. This notion differs from the English definition of cultural industries, which encompasses a slightly broader range of activities. that the ESSnet-Culture network defines 'cultural industries as follows (cf. "Concepts for the Statistical Framework on Culture", *Culture-Méthode* n° 2011-3, DEPS-Ministry of Culture):

- a "culture industry" (CI) defines an independent economic segment within the culture sector;
- this economic segment groups together all businesses and independent traders that are involved in the creation and distribution of artistic products and services in the market;
- cultural businesses and self-employed artists are either market-oriented or commercial in nature because they are predominantly financed by the market, by selling their works, products or services at market-driven prices;
- the CI are represented by commercial or market-oriented sub-sectors of the culture sector in each of the 10 cultural domains: heritage, archives, libraries, books and press, visual arts, performing arts, audio-visual and multimedia, architecture, advertising, and crafts;
- self-employed artists and those working in the CI occupy a special position because they often interchange between market and non-market-oriented activities and can therefore be stakeholders in both profit and non-profit markets; and
- the CI do not include non-profit businesses, organisations or associations, which are predominantly funded by public authorities or private donors (civil society). The main purpose of these institutions is not fetching market-driven prices or generating income to ensure their existence.

National bodies were created to support the economy of the cultural industries through a system of tax-redistribution, as for example the National Book Centre (Centre National du Livre), the National Centre for Cinema (CNC - *Centre National du Cinéma et de l'Image Animée*) or the National Centre of Song, Popular Music and Jazz (Centre National la Chanson, des Variétés et du Jazz). These bodies manage special accounts fed by levies and fees on purchases, entrances, or others: National Book Fund, State Support Fund for the Cinematographic Industry and Broadcasting Industry, and the Support Fund for Song, Popular Music and Jazz. These funds support measures in these sectors (either selective or automatic such as, for example, "advance on takings" financing (*avance sur recettes*) to support films that are ambitious from an artistic standpoint, but facing difficulties in finding funding. In 1983 the *Institut pour le financement du cinéma et des industries culturelles* was created (IFCC). This non-departmental public body, attached to the Ministry of Culture and

the Ministry of Finances, facilitates access to bank credit for cultural industries. The CNC backs the territorial authorities' expenses for cinema and broadcasting, based on agreements signed between these authorities and the State (DRAC). Such agreements involve 40 territorial authorities.

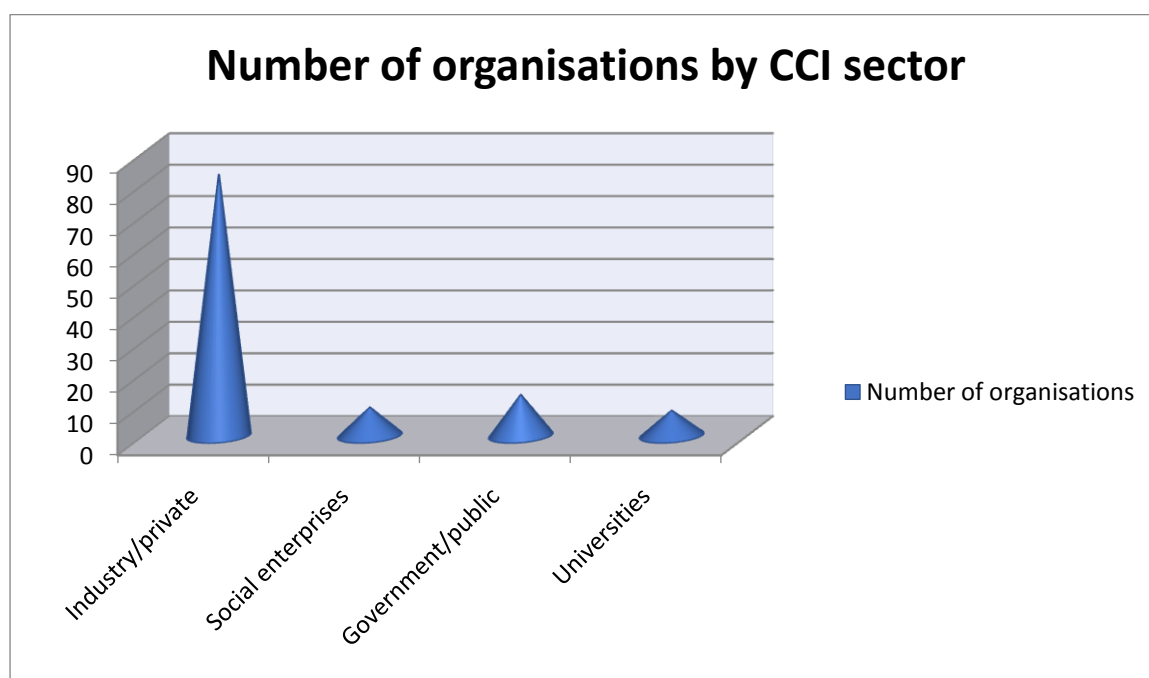
There is specific aid (DRAC, territorial authorities) for small local or national cultural industries that have little commercial activity. This is the case for small labels, of contemporary or "current music" (*musique actuelle*). It is also the case for small booksellers, small publishers, for the cinema of art and the local theatres in medium and small cities, or rural areas. Local authorities often complement the national instruments and set up their proper support schemes and structures. There are around twenty Regional Centres of Literature (*Centres régionaux des lettres*, CRL) that coordinate their actions within the Interregional Federation of Book and Reading (FILL); around forty regional and local film and cinema agencies (*commissions régionales et locales du film*), which are set up for the purpose of attracting, co-producing and circulating films shot in the regions, and are federated in the network *Film France*.

In 2013, the Ministry published a guide about the different schemes that can support the creation and development of enterprises in the cultural industries (<http://www.culturecommunication.gouv.fr/content/download/67306/515895/file/130516-web-2.pdf>), and set up a database on the different public measures in favour of media and cultural industries at local, national and EU level (<http://deps2.customproject.fr>). The culture industries have undergone a series of major changes over the last twenty-five years. The range of products is continually expanding (books, records, films, then video, compact discs, CD-ROMs, DVD, online or e-products and so on). Their production and distribution has become more centralised and internationalised, and trading policies have become much more sophisticated. In the face of highly competitive markets, government initiatives aim to guarantee diversity with a broad range of cultural productions and to distribute them as widely as possible.

Mapping report: findings

For Laval in the Pays de Loire region of France there were a total of 113 responses to the questionnaire by companies in the CCI sector. Of those 79 are content creators and 72 content producers. Overwhelmingly these companies operate as creators and producers with only 17 companies operating as creators solely and 9 producers solely. The synergies and economies of scale for small enterprises result in most businesses being creators and producers in the supply chain. The sample consisted of organisations from five different industry sectors as illustrated in Figure 9. There were 83 private sector organisations included; 9 social enterprises; 13 public sector and 8 universities. The sample is representative of the overall distribution of organisations across the five sectors in France with small scale private sector dominating. There is a strong public sector aspect to supporting the CCI in the region and a growing number of social enterprises supporting efforts to tackle social issues through the arts.

Figure 9: Sample by industry sector in France (Laval)



There were a broader range of activities recorded in the France (Laval) survey than others, 19 in total ranging from technical services and professions such as architecture and cultural management to the cultural arts such as dance and music. Table 4 illustrates the breakdown of firms involved in a range of CCI activities in the survey. In the pay de Loire region of France architecture and fashion design feature heavily along with fine arts, web design and writing/publishing. A key trend is the relatively higher prevalence of activities around the cultural aspect of the CCI with fine arts in particular featuring prominently. These have attracted a number of small scale enterprises offering support services and content for a highly developed domestic market. There is also a vibrant publishing industry in the region with companies involved across the supply chain from content to sales and promotion. Advertising has also attracted a number of small enterprises that support a wide range of industry sector including the CCI. As a region of high cultural awareness the Pay de Loire hosts numerous events on an annual basis and this is reflected in the number of events management companies that support this along with expertise in cultural management.

Table 3: Creative and Cultural Industry activities in France (Laval)

Activity	Number
Advertising	11
Architecture	21
Cooking	1
Crafts	4
Cultural management	1
Dance	5
Designer fashion	13
Digital arts	1
Events	7
Fine arts	8
Graphic design	3
Music	5
Social media	2
Technical services	4
Theatre	2
TV/radio	3
Video/audio	6
Web design	8
Writing/publishing	8

The size distribution by employees of the sample firms in France (Laval) is illustrated in Figure 10. The survey shows that 65 of the 113 companies who responded had less than 5 employees; 17 have between 6-10 employees and 16 have between 11 and 30 employees. In total, 87% of companies have less than 30 employees with the majority being small or micro sized companies. There were 2 large companies, one with between 100 and 250 employees and one other with over 250 employees. The sample demonstrates that the vast majority of companies operating in the CCIs in the pays de Loire region are small scale firms. The cultural industries in the region feature more prominently compared to the other regions of the Atlantic Area participating in the survey with creative cooking, dance, fine arts, music, cultural management and crafts accounting for 24 (21%) of the total surveyed. This is a reflection of the high regard the cultural arts have across society in the Pays de Loire region. Also, the broad range of different activities suggests that the region serves numerous different types of demand across the CCI with some focusing on technical support for traditional industries such as publishing and graphic design and other offering service support for cultural industries. New companies also feature in developing sectors such as social media and digital arts. The Pays de Loire region exhibits a high level of activity across the CCI which can be explained by sustainable domestic demand innovative practices by

specialist small firms and a range of support mechanisms for CCI enterprises from both regional and central government in France.

Figure 10: Company size by employees in France (Laval)

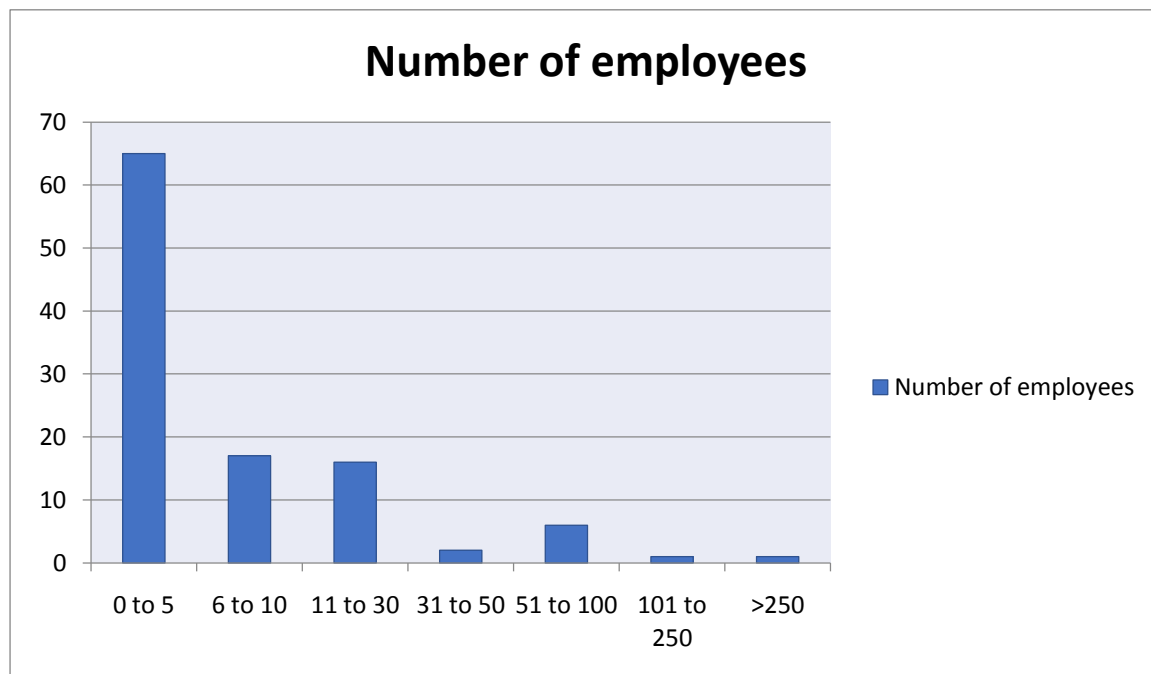


Figure 11 illustrates the trends in the number of firms being established across different timeframes in the Pays de Loire region. While the majority of companies have been established prior to 2000, there has been year on year increases in the number of firms being established between 2000 and 2017 across the sector with 32 companies in the survey having been established prior to the year 2000. Since 2000 the rise in the numbers of new companies has been marked with 15 setting up in the period 2000-2004; 17 in 2005-2009 and 17 between 2010 and 2015. This trend continued into the period 2015 to 2017 with 8 new companies established over the shorter timeframe. The data points to the region attracting entrepreneurs who exploit the potential that the CCI offers across a wide range of activities. The delivery of services such as cultural management reflects the demand for expertise and experience across the sector.

The data suggests a very vibrant CCI sector in the Pay de Loire region but there is scope for more businesses to extend their reach to international markets. Figure 12 illustrates the number of firms operating across borders with 44 recording that they are internationally active and 63 not. There is an emphasis on supplying to the regional or national demand for products and services in support of the cultural element of the CCI. This lends a very distinct and localised character to the types of products and services being delivered by a range of small scale enterprises. The nature of demand for such outputs sustains and helps grow

local businesses in the sector. However, there is clearly scope for extending activities beyond the regional or national markets to exploit opportunities across the EU and beyond.

Figure 11: Number of firms by year established in France (Laval)

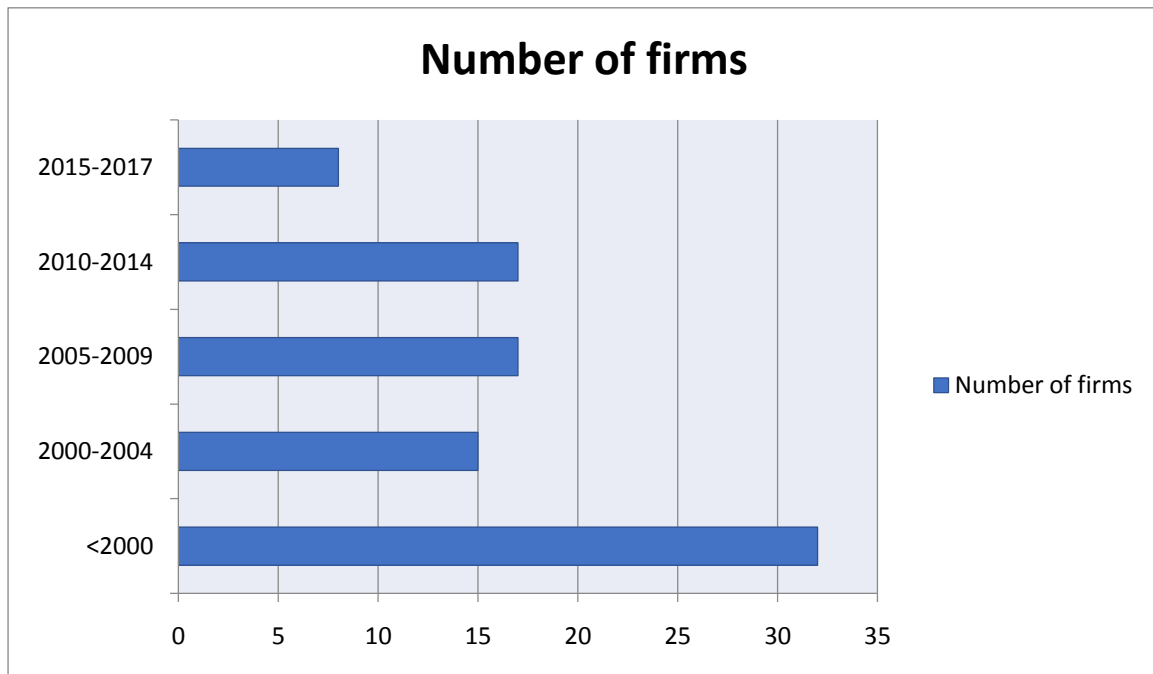
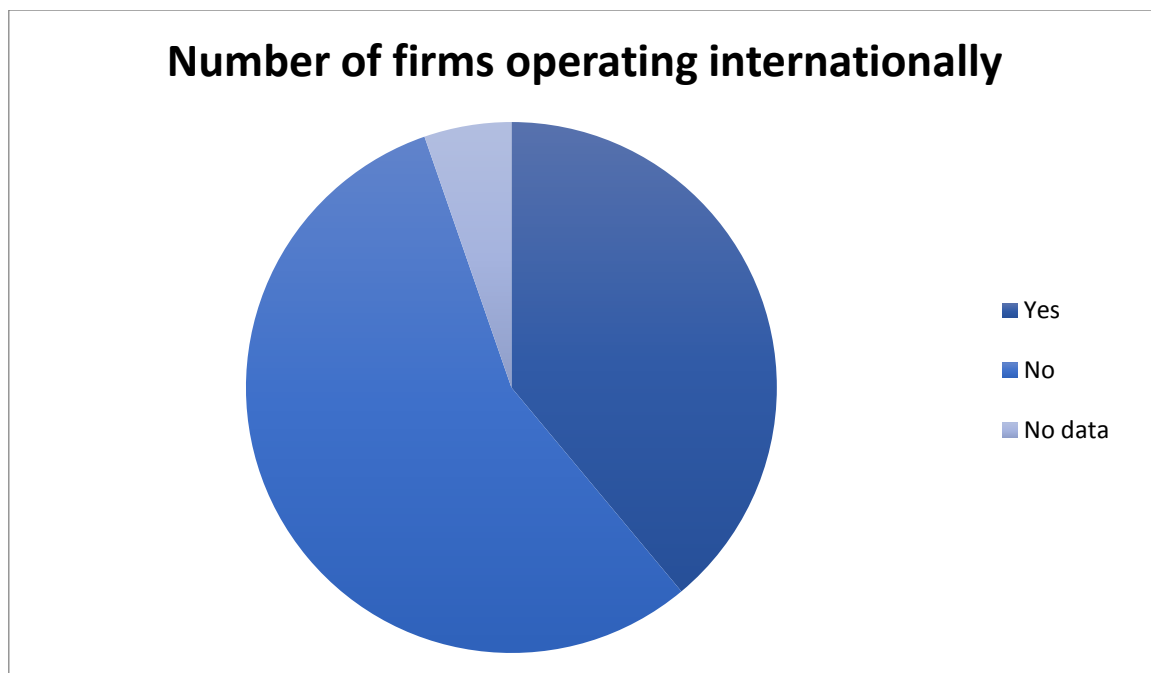


Figure 12: Number of French (Laval) firms operating internationally



Mapping report: Spain (Asturias)

Overview

Since 2014 the action plan for the creative and cultural industries in Spain feature the promotion of creators and cultural industries, and the growth, consolidation and internalisation of cultural firms. In the particular context of small and medium enterprises (SMEs), the government, through the different plans for the promotion of cultural industries, has recognised the key role of SMEs as the core of the Spanish cultural and creative industry, and has addressed one of the main problems faced by these companies: the financing of cultural and creative projects. To address this, the government has implemented a system of capital grants, and access to credit together with the *Sociedad de Garantía Recíproca Audiovisual* [*Mutual Guarantee Society*], to promote the modernisation, innovation and technological adaptation of cultural companies and to increase the legal supply of cultural content on the Internet.

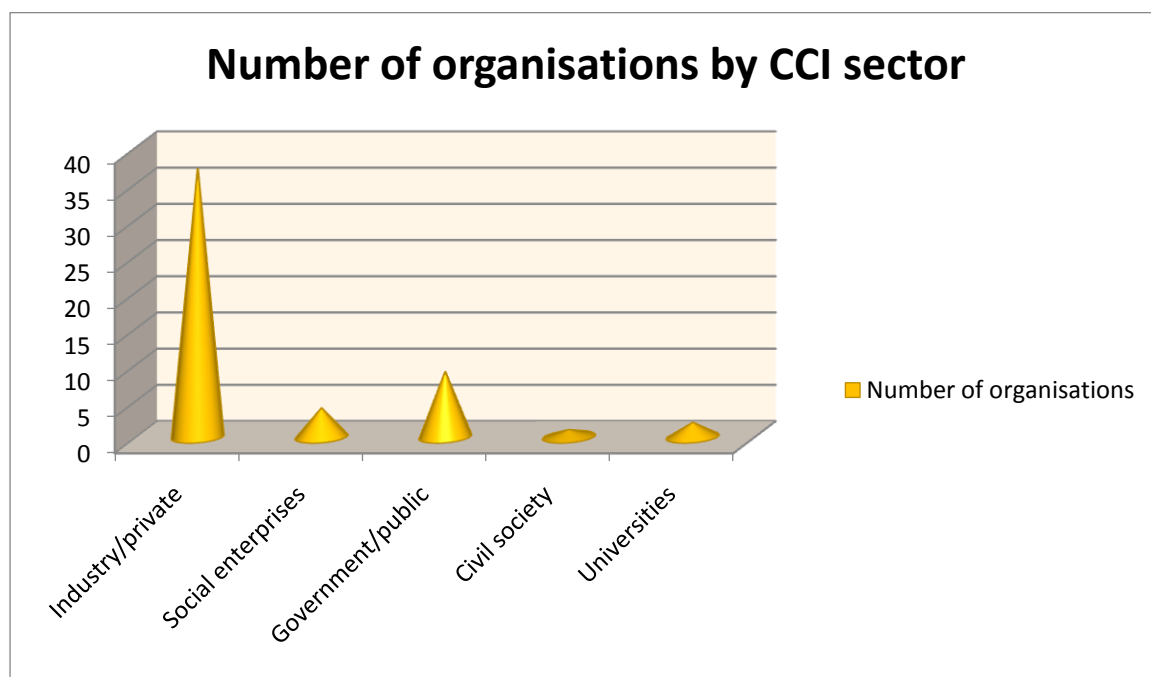
Graphic design, advertising and the audio-visual sector in Asturias are the most prevalent activities within the creative sector. In the case of graphic design, with a deep-seated tradition in Asturias, the activity is supported by the prestigious *Higher Arts School of the Principality of Asturias* and the *Oviedo Arts School*, in the *Asturian Association of Graphic Designers (AGA)*, and the recognition from the MOTIVA awards, which position graphic design as both valuable and essential. The *Audio-visual Cluster of Asturias* aims to promote the development and globalisation of the sector, grouped within the *Association of Audio-visual Production Companies of the Principality of Asturias*; for their part, the *Asturias Film Commission* takes advantage of the numerous aesthetic and natural resources of Asturias, an enclave which is already outstanding as a filming location for national and international productions. The advertising sector, which has undergone considerable growth in recent years, is grouped within the *Advertising Companies Association of the Principality of Asturias (ADAPPA)*. The video gaming sector stands out as the link between the creative sector and ICT. Asturias has a specific acceleration programme for entrepreneurs entitled *Let's Game*, backed by *CEEI Astur*.

Mapping report: findings

Figure 13 gives a breakdown of the number of organisations linked to each sector. The survey for Asturias featured 53 respondents with the majority being small scale commercial companies. 37 of the 53 participating organisations were from this sector with 9 government or public sector organisations and 4 civil society organisations. Two universities were also included. As illustrated in Figure 14 the majority of companies in the survey were small-scale or micro businesses with less 5 or less employees. These companies predominantly deliver products or services to support the wider CCI, although there is a relatively high number involved in fine arts. There were 5 companies that had between 6 and 10 employees and 8 with between 11 and 30 employees. A further 6 had between 31

and 50 employees. Overall, the number of companies that employed between 6 and 50 employees is 19 out of the 53. Relative to other regions this represents a higher ratio of companies with significantly higher employees. In the CCI a company with 11-30 employees would be the exception rather than the rule, but in Asturias 8 companies were in this category. Having 6 with between 31 and 50 employees is exceptional for a region the size of Asturias and suggests that some firms have been able to effect significant growth in key sectors of the CCI.

Figure 13: Sample by industry sector in Spain (Asturias)



The survey for Asturias revealed a relative high number of firms operating in the fine arts sector with 8 featuring. Architecture was also well represented with 11 companies responding. There were 7 companies who delivered support or content for the music industry. Table 4 lists the number of respondents to CCI activity in Asturias. The main finding is that there is a mix of cultural activities such as fine arts, museums and music along with traditional creative industry activities such as architecture and video/audio content and services. The range of activities across Asturias is not as extensive as other regions but it needs to be viewed in context given the relative size of the region and the overall population of the main cities. The responses came mostly from companies in the three main cities of the region including Aviles, Oviedo and Gijon. These three areas drive the majority of the demand for CCI outputs in the region of Asturias. Overall, 47 of the 53 respondents came from these areas with Aviles accounting for 33 of them. It is worth noting that the government and/or public sector support the cultural richness of the region with 9 organisations included in the survey. This is represented in the types of investments to

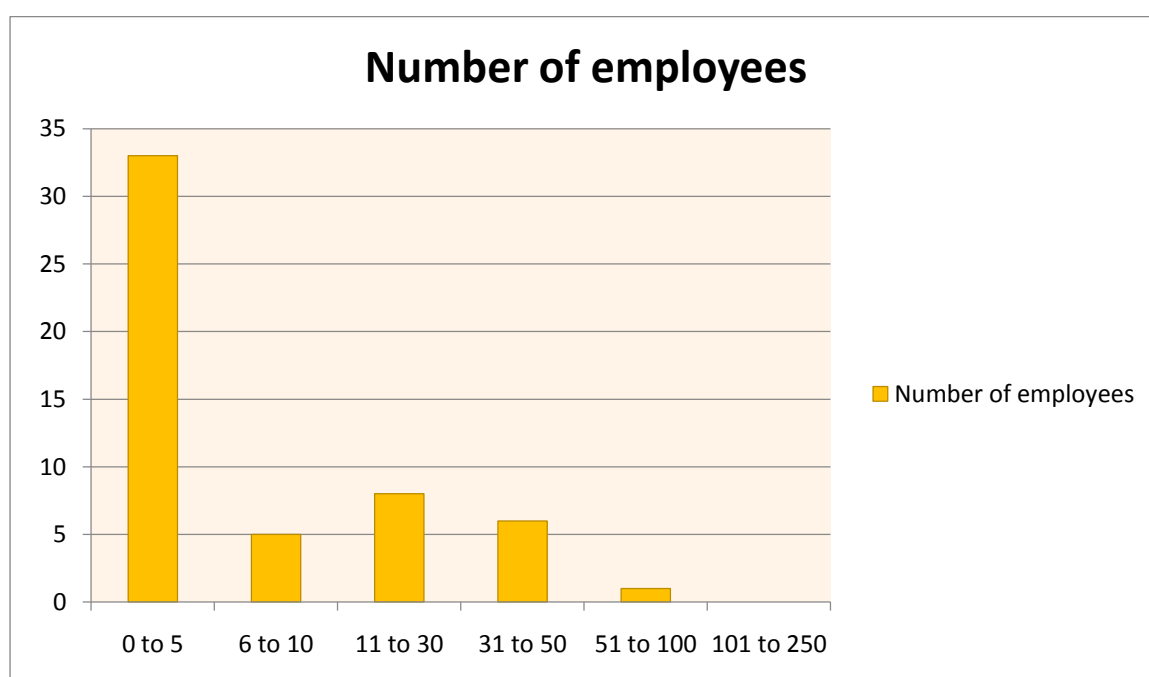
support the CCIs in the region including the establishment of the *Oscar Niemeyer International Cultural Centre* and the *Cultural Factory* in Aviles.

Table 4: Creative and Cultural Industry activities in Spain (Asturias)

Activity	Number
Advertising	6
Architecture	11
Cooking	1
Crafts	2
Dance	2
Designer fashion	2
Events	1
Fine arts	8
Museums	2
Music	7
Social media	1
Theatre	3
TV/radio	2
Video/audio	4
Writing publishing	1

The majority of companies surveyed are small scale enterprises with 5 or less employees. However, given the relative size of the region there are a significant number of companies with 10 or more employees. Asturias has a well-defined strategy for encouraging and supporting the development of the CCI sector and this has had a positive effect on the growth in numbers of small scale enterprises as well as enabling the development of larger companies delivering high quality outputs in both the creative industries and those that support the cultural dimension to Asturias. The CCI sector is an important one for the region's economy and it is evident that the jobs growth is indicative of the expertise that has developed around activities such as advertising and video/audio services. These are typical of the type of creative outputs delivered by companies in Asturias with highly specialised services supporting a range of other industries defining the range of activities undertaken. Architecture is a prime example of the type of creative activity that has shown significant growth in the region with the number of larger (11-30 employees) increasing since 2000. For a region that has traditionally relied on heavy industry, Asturias has achieved some significant success in growing the CCI sector over the last twenty years with employment across the sector increasing year on year over the period.

Figure 14: Company size by employees in Spain (Asturias)



The increase in the number of employees recorded reflects the growth in new firms entering the CCI in Asturias. While the majority of companies in the survey have been in existence since before 2000, there has been a significant increase in the number of new companies setting up since then. There were 5 new companies set up in 2000 to 2004; 7 in the period 2005 to 2009 and 14 between 2010 and 2015. The trend continued in 2015 to 2017 when 6 new companies were established over that shorter two-year period. The trends are illustrated in Figure 15. Clearly the upward trend in the number of new companies being established and the recorded rise in employment in the Asturian CCI indicates a vibrant and growing sector with opportunities to exploit opportunities not just in Asturias but also in other Spanish and international markets.

Figure 16 illustrates the number of Asturian firms operating internationally with 32 out of 53 doing so and 9 recording that they do not. No data was available from 12 others. This demonstrates the efforts being made by Asturian firms in the CCI to look beyond domestic markets to exploit others in new territories. This proactive approach to seeking new markets internationally enhances the reputation of Asturian firms to deliver high quality products and services and acts as a further catalyst for growth across the sector.

Figure 15: Number of firms by year established in Spain (Asturias)

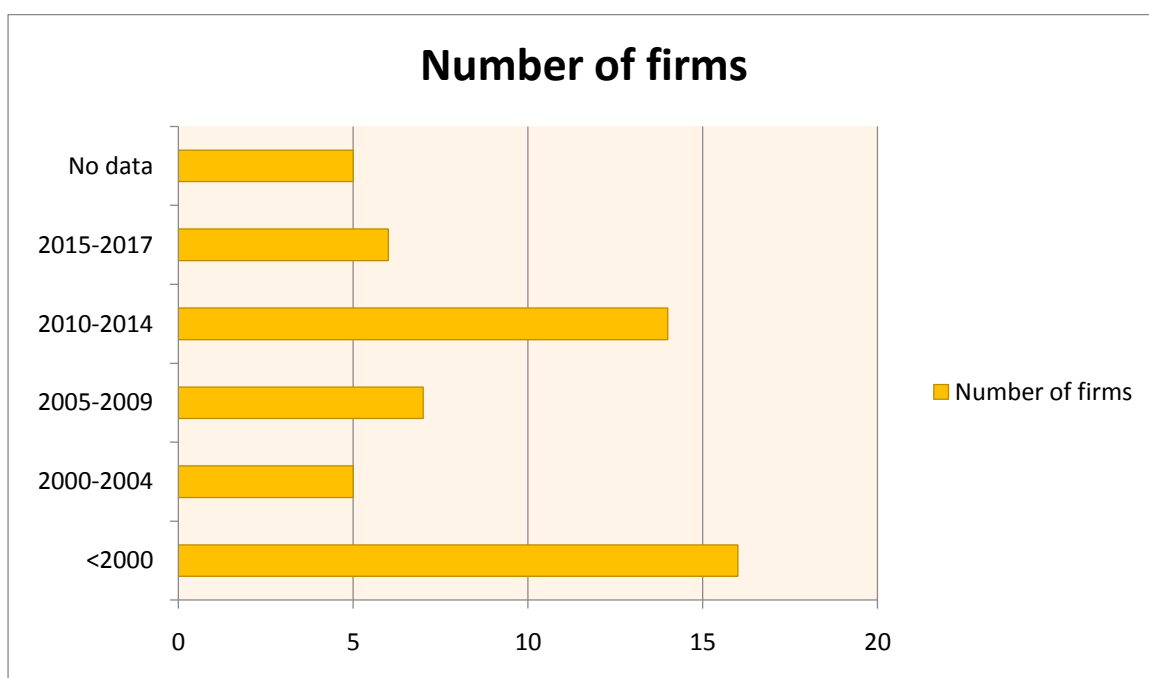
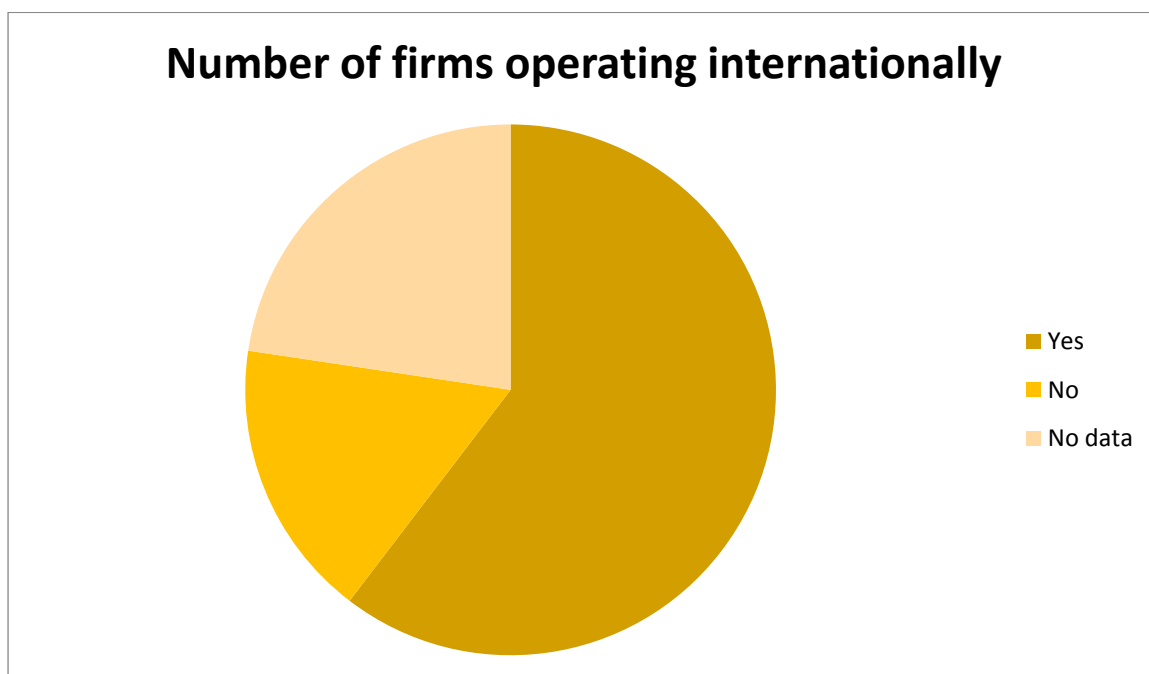


Figure 16: Number of Spanish (Asturias) firms operating internationally



Mapping report: Spain (Seville)

Overview

Seville, the capital of Andalusia, is the fourth largest city of Spain with 703,000 inhabitants. Its most famous music festival, the *Bienal de Flamenco*, showcases a musical genre that was recognized as UNESCO Intangible Cultural Heritage in 2010. Seville plays a leading role as an administrative and economic centre of southern Spain. In addition to its longstanding tradition in the aerospace industry, the economic activity of Seville is now dominated by the service and tourism sector which represents a significant share of the local economy. Other highly developed sectors in the city are specialized technical services such as architecture, engineering, and the creative and cultural industries, which have demonstrated their great potential. Seville has become a highly recognized centre of creativity with a particularly impressive reputation for attracting musicians with activities ranging from symphonies and operas to open public spaces dedicated to music.

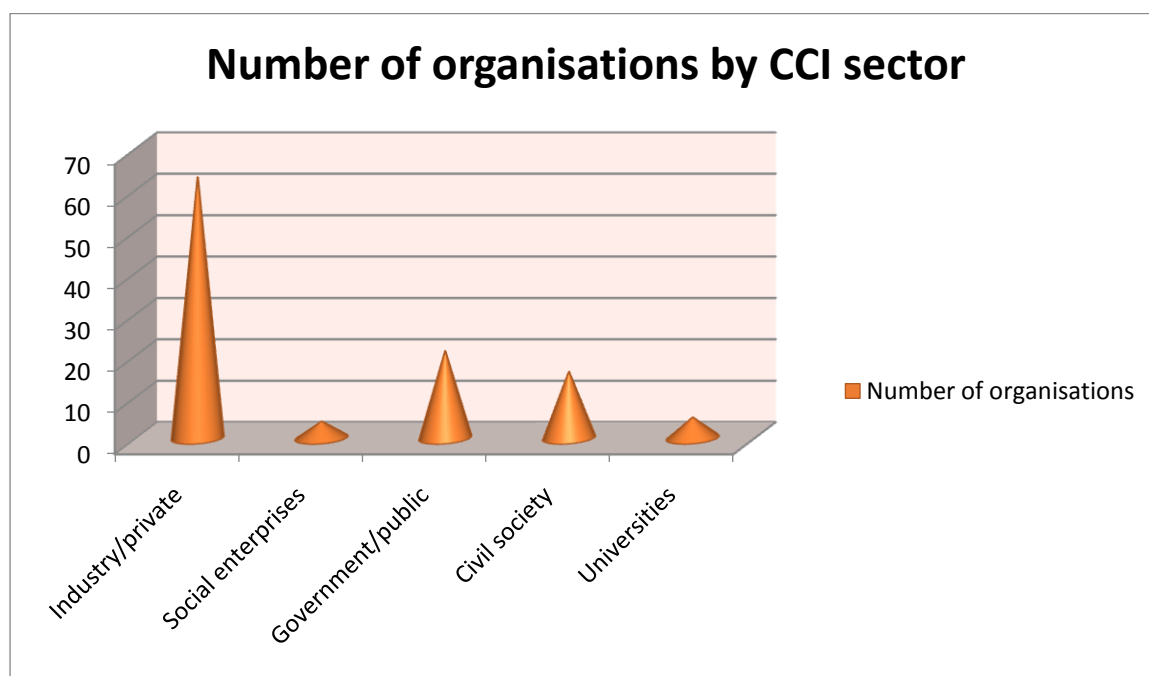
Since the appointment as first UNESCO Creative City of Music in 2006, the Seville City Council (ICAS) has committed to putting music as a key element in the lives of citizens by offering quality programmes featuring musical activities for enhancing 'culture capital' and acting as a catalyst for welfare and employment by supporting the local music industry. Consequently, ICAS developed an Action Plan for Cultural Initiatives for the period 2015-2019 that features key objectives of:

- ensuring access to culture as a common good and promote the participation of citizens in cultural issues;
- supporting the local cultural network by detecting its needs and implementing favourable cultural policies;
- developing brand awareness between Culture and City, which includes all cultural proposals involving mutual recognition between institutions and citizens;
- leading cultural strategies promoting cooperation between the public and private sectors and civil society; and
- encouraging partnerships with the member cities to facilitate the artists' mobility and exchange know-how.

Mapping report: findings

There were 109 responses to the survey undertaken for the CCIs in Seville and the wider Andalusian region. Of those organisations, 63 were private sector companies; 16 were civil society; 4 social enterprises; 21 government/public sector and 5 universities. The private sector dominates the supply of CCI products and services in the region even though there is a significant government/public sector involvement, especially around supporting important cultural events. Social enterprises are also emerging as important conduit for tackling social problems in the region especially around issues of social exclusion and youth unemployment. Figure 17 illustrates the number of organisations featuring in the range of sectors in the survey.

Figure 17: Sample by industry sector in Spain (Seville)



The survey for Seville shows a wide range of different activities across the CCIs included in the survey with music and fine arts most represented. This reflects the investment in the range of music festivals and concerts that have become a mainstay of the creative and cultural strategy for the city of Seville and accounts for its prominence among the key cultural centres in Europe. The region has also seen a rise in the number of TV and radio stations along with many support industry actors around that. There is a vibrant advertising and promotional sector that relies on creative outputs and support too. Table 5 lists the number of firms engaged in CCI activities in Seville and the wider Andalusia region. The majority of companies are involved in content creation and content production. The data shows that 63 companies were involved in content creation and 57 in content production. However, the majority of these companies operated both simultaneously as they

complement each other. There were 20 companies involved in facilitation and 9 distributors. The supply chain is well represented by companies across the region but the main activities revolve around content production and creation or support activities.

Table 5: Creative and Cultural Industry activities in Spain (Asturias)

Activity	Number
Advertising	12
Architecture	7
Cooking	1
Cultural management	5
Dance	6
Designer fashion	2
Events	2
Fine arts	17
Gaming	4
Graphic design	4
Museums	4
Music	15
Theatre	1
TV/radio	11
Video/audio	12
Web design	3
Writing/publishing	3

Figure 18 illustrates the size distribution of the sample firms by employment. The survey showed that 33 of the 109 companies who responded had less than 5 employees with a further 40 having between 6-10 employees. This suggests that a slightly larger set of companies dominate the CCIs compared to the average across the other Atlantic Area regions where companies with less than 5 employees dominate. In the region overall a total of around 70% had less than 10 employees making the sector predominantly populated by small or micro-sized companies. There was one large company with more than 250 employees and one company had between 100 and 250 employees. Also, there are 23 companies that have between 31 and 50 employees, again this is higher than the average across the Atlantic Area. The data suggests that companies across Andalucia, and Seville in particular, have been able to leverage growth through proactive and effective strategies to exploit opportunities in the CCIs in Spain and abroad. Even so, the sample underlines that the majority of companies operating in the CCIs in region are small scale firms delivering highly specialised services or content.

As a European central hub for the creative arts, this reflects the nature of creativity and entrepreneurship across the sector with smaller businesses being able to specialise in specific types of outputs that are of high quality and high value. There have been economies made through the development of Seville as a cultural centre for the arts and many

companies have been able to grow as a consequence of the cluster of activity around the arts that has emerged around distinct arts development strategies implemented at local and regional government level. The reputational capital gained has attracted artists and creative talent to the region and proved a catalyst for enabling the creative economy.

Figure 18: Company size by employees in Spain (Seville)

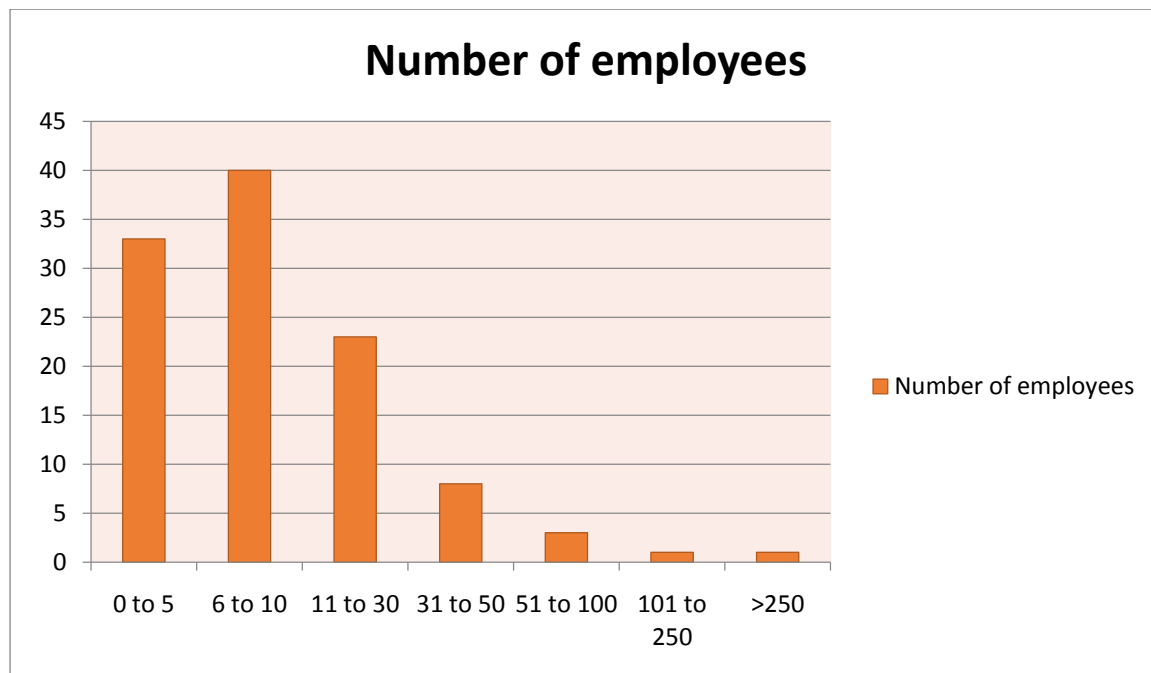


Figure 19 illustrates the trends in the number of firms being established across different timeframes in Seville and the wider Andalusia region. Most companies in the survey have been established since before the year 2000, although the trend for start-ups and new entrants since then has been on an upward trajectory. There were 12 new companies in the years 2000 to 2004 and 23 in the period 2005 to 2009. There was a dip in the period 2010 to 2014 in the wake of the financial crisis of 2008, but things recovered in the period 2015 to 2017 when there were 19 new entrants across the sector. The data points to a resurgent CCI sector across the region with new entrepreneurs exploiting human creative talent and technology to deliver specialised products and services to a growing market at home and abroad. This is emphasised by the fact that of the 109 firms participating in the survey, 92 operated internationally as illustrated in Figure 20.

Figure 19: Number of firms by year established in Spain (Seville)

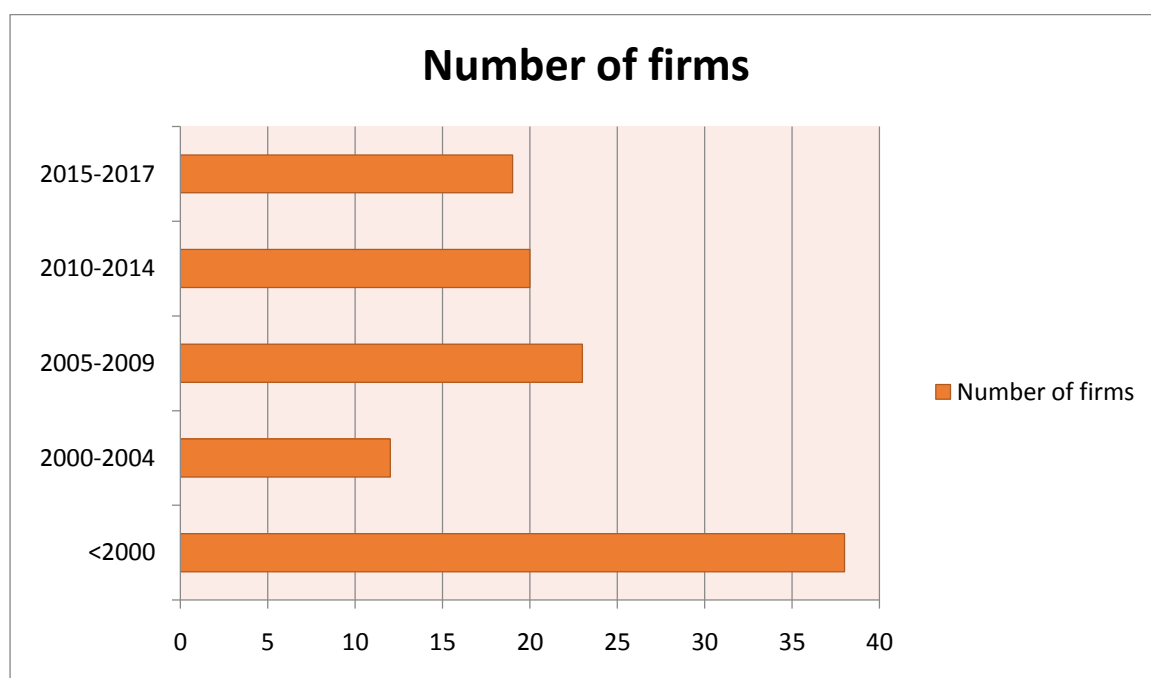
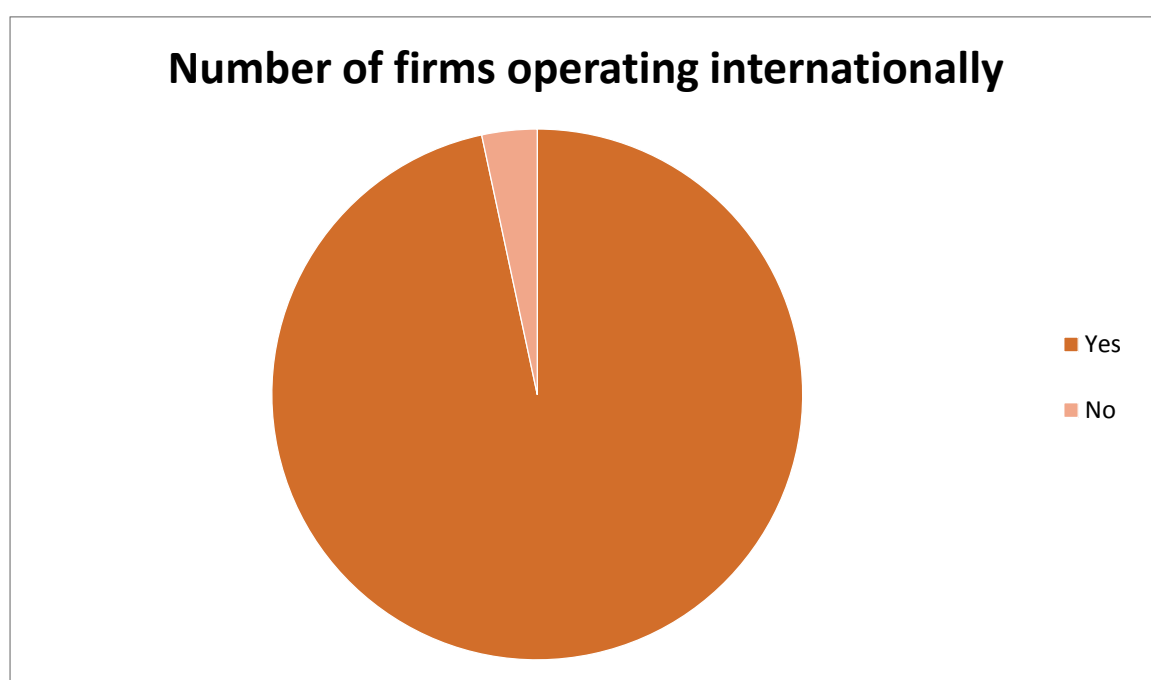


Figure 20: Number of Spanish (Seville) firms operating internationally



The data suggests that the cluster of expertise around the Seville area has now attracted interest from markets beyond Spain. The Action Plan for 2015-2019 put forward by the city council for Seville aims to consolidate and build on the success of attracting the best talent and around the creative arts supported by entrepreneurs and innovators who can deliver

contemporary and specialised outputs that services international markets. The reputation of Seville as one of Europe's foremost centres for the arts and culture has galvanised stakeholders to exploit the business and creative opportunities that this provides. The success of Seville demonstrates the importance of key stakeholders collaborating for the benefit of both the business community and citizens through the implementation of a distinct and effective strategy for growth.

Mapping report: Lisbon

Overview

In Portugal, the creative sector represents approximately 3.4% of total employment, representing the Gross Value Added (GVA) generated of about 3% of the Portuguese economy in 2016. Data is collected by the *Division of Studies and Prospective of the Municipality of Lisbon*. In the Greater Lisbon area the weight of the “creative sector” in the labour market remains proportional to the national data, representing about 3.3% of workers. This corresponds to 38.287 jobs recorded in 21,859 companies. Around 30% of total creative employment in the country focuses in this region. The Greater Lisbon area has approximately 47% of total GVA of the creative sector in the country with the value added significantly higher than other parts of Portugal. It is important to highlight that the activities of advertising, film, video, television program production, sound recording and music publishing, radio and television and publishing of books, newspapers and other publications, represent around 75% of GVA in the country.

The city of Lisbon stages cultural events throughout the entire year. The series of events place the city on the map of European creative cities and as a creative and dynamic cultural capital. The cultural investment in events has seen Lisbon become a European hub for participation by Portuguese citizens and increasingly an international public. The city has ambitions to overtake London as the cultural centre of Europe with, for example, the Lisbon Fashion Week attracting the world’s leading designers. This premier fashion event in Portugal has quickly positioned itself as the first professional structure for the presentation of the collections of Portuguese fashion designers. Also, for the first time in Lisbon, the international event *Open House* was organized by the *Lisbon Architecture Triennale*, an association that aims to investigate, stimulate and promote architecture. In the cultural industries, film and music are mostly represented in a wide variety of events and festivals held throughout the year. Examples of such international music festivals are *Rock in Rio*, the *Calouste Gulbenkian Jazz* in August and the *Lisbon & Estoril Film Festival*. In publishing and writing, the annual *Lisbon Book Fair* has two hundred stands, publishers and booksellers who present everything from their latest novelties to book catalogues. In the artistic and cultural activities one of the highlights is the *Alcantara Festival* dedicated to the performing arts. This is held biennially and attracts to the city a diversified range of innovative artistic proposals representing different realities and views on contemporary creation. To help initiate collaboration in artistic work the *ILUSTRARTE* provides a meeting space and discussion forum for the best international illustration for children books.

Mapping report: findings

The survey for Portugal focused on the Lisbon metropolitan area and gathered 200 responses by companies or organisations in the CCI sector. The majority were from the private sector (150) with 26 social enterprises and 16 government or public sector organisations. A total of 8 universities also responded to the survey. Figure 21 illustrates the breakdown of organisations linked to the four different sectors. Of the 200 organisations, 59 are content creators and 122 content producers with 59 operating as both content creators and producers. There are 36 facilitators and 61 distributors along the supply chain of CCIs in Lisbon. Small scale enterprises dominate the CCI but there is also strong representation from social enterprises using the arts as a means of tackling social problems, especially those brought about by poverty following the financial crisis of 2008. There are now 26 social enterprises in the Lisbon area dedicated to using the arts for this purpose and many have worked in collaboration with local communities, local government and the private sector to address a range of social issues. There is also a significant public sector aspect to supporting the CCI in and around Lisbon with the local authorities proactive in implementing a strategy to position the city as a leading centre for the creative industries in Europe. Table 6 outlines the range of different activities undertaken by organisations in the survey.

Figure 21: Sample by industry sector in Portugal (Lisbon)

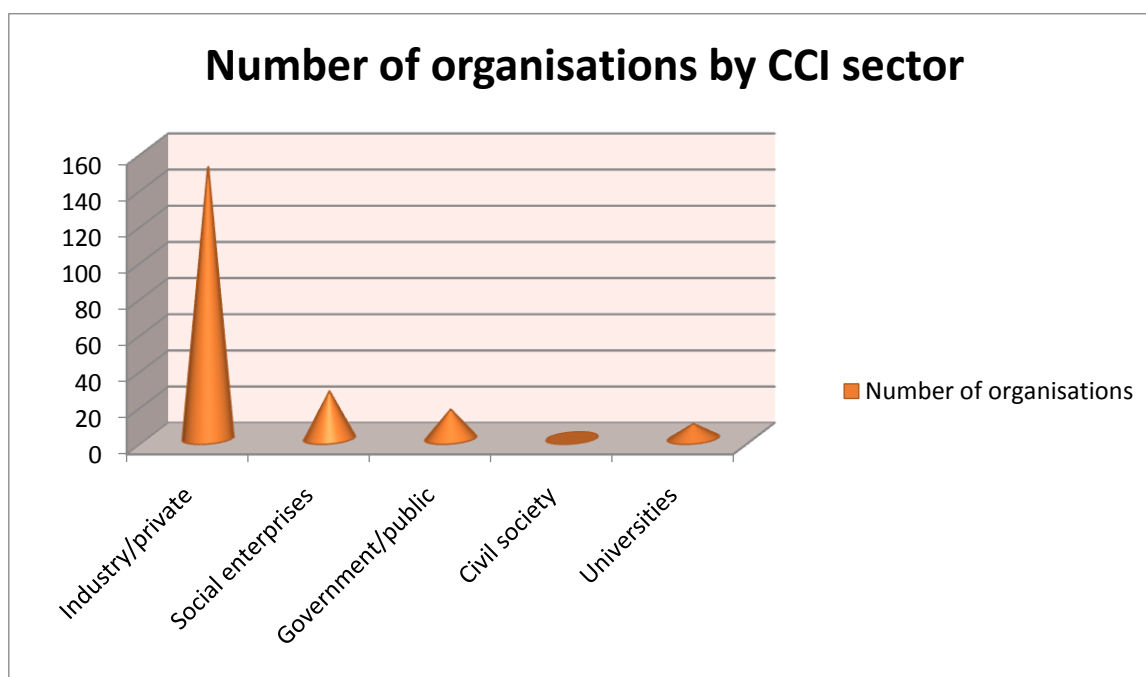


Table 6: Creative and Cultural Industry activities in Portugal (Lisbon)

Activity	Number
Advertising	53
Architecture	7
Cooking	1
Dance	3
Designer fashion	1
Digital arts	5
Events	3
Fine arts	4
Gaming	14
Legal	4
Museums	4
Music	17
Photography	3
Theatre	2
TV/radio	20
Video/audio	33
Writing/publishing	2

There is a very strong advertising presence among the respondents to the survey with 53 companies engaged in this activity. This links to the rise in TV/radio broadcasters with some 20 companies engaged in that. This relatively high number is associated with advertising services and accounts for the cluster of companies engaged in those creative outputs. Similarly, the high number of companies specialising in video/audio output or service support also indicates a growth in these sectors. There are 33 respondents engaged in the video/audio sector making the three sectors of advertising, TV/radio and video/audio accountable for just over half of the 200 companies in the survey. Gaming is another growth area in Lisbon with 14 companies responding. The music industry also contributes to a significant amount of creative economy output and benefits from the range of musical events that are organised in and around the city on an annual basis. Here, there is a role played by the public sector with local authorities investing in the cultural capital of the city. Lisbon has enjoyed support from local authorities in collaboration with support agencies for the arts to deliver events spanning from opera and dance to book festivals and film. Essentially, there are activities around the arts and culture all year round ensuring that Lisbon is a vibrant, active and compelling venue for many creative economy actors.

Figure 22: Company size by employees in Portugal (Lisbon)

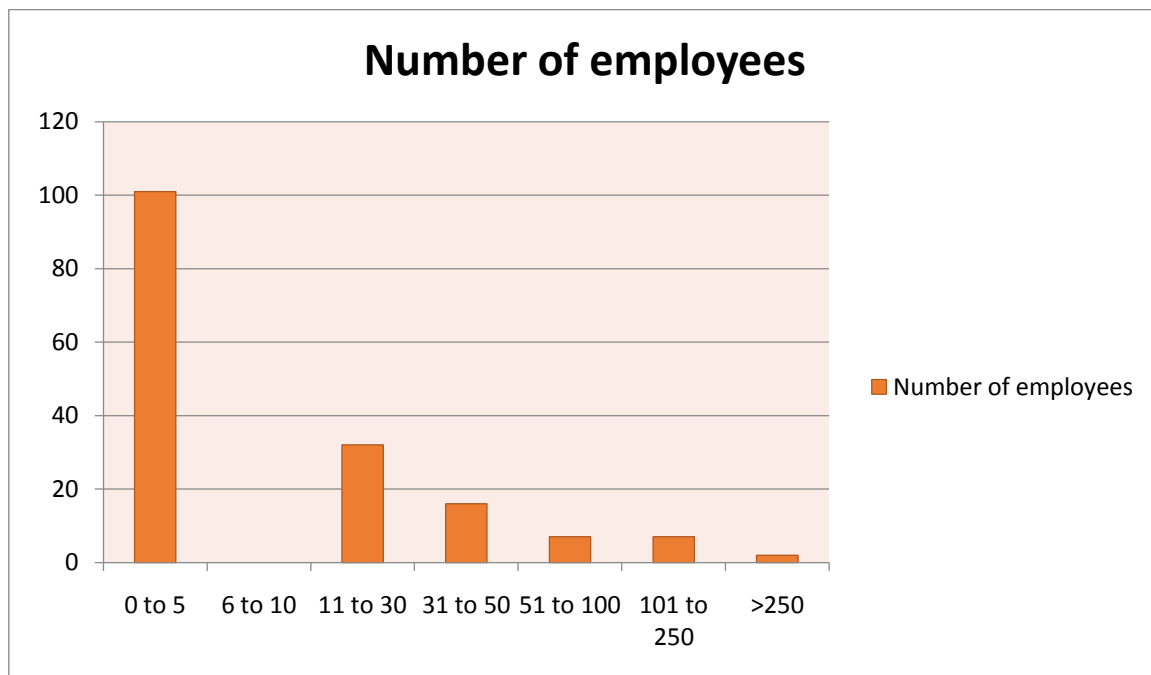


Figure 22 reveals that the majority of companies in the survey are small-scale operators with fewer than 6 employees. As noted previously just over half of the companies surveyed were engaged in TV/radio or video audio activity. The related advertising industry also features prominently. There were no companies recorded that had between 6 and 10 employees and 32 with between 11 and 30 employees. A further 16 had between 31 and 50 employees. There are 7 companies with between 51 and 100 employees; 7 between 101 and 250 employees and 2 large companies employing over 250. Both ends of the size spectrum are well represented in Lisbon with many small-scale businesses but also a relative high number of large-scale companies with 16 employing 51 or more. Many new companies are being set up to exploit the burgeoning reputation of Lisbon as a creative economy hub. Figure 23 illustrates this trend with 28 new entrants between 2000 and 2004 rising to 43 between 2005 and 2009 and peaking at 47 between 2010 and 2014. This upward trend reflects the confidence and opportunity that exists in the Lisbon area for delivering creative and cultural outputs or support services to an ever expanding number of industry sectors. Entrepreneurs have been attracted to the area based on the reputation the city has nurtured for attracting fashion designers, musicians, and artists from around the globe. The data suggests that Lisbon is on target to supersede London as Europe's cultural and creative capital even though there is a considerable way to go yet. Nevertheless, the strategy put in place by city leaders to achieve this aim is reaping benefits both in scale and scope of activities around the creative economy.

Figure 23: Number of firms by year established in Portugal (Lisbon)

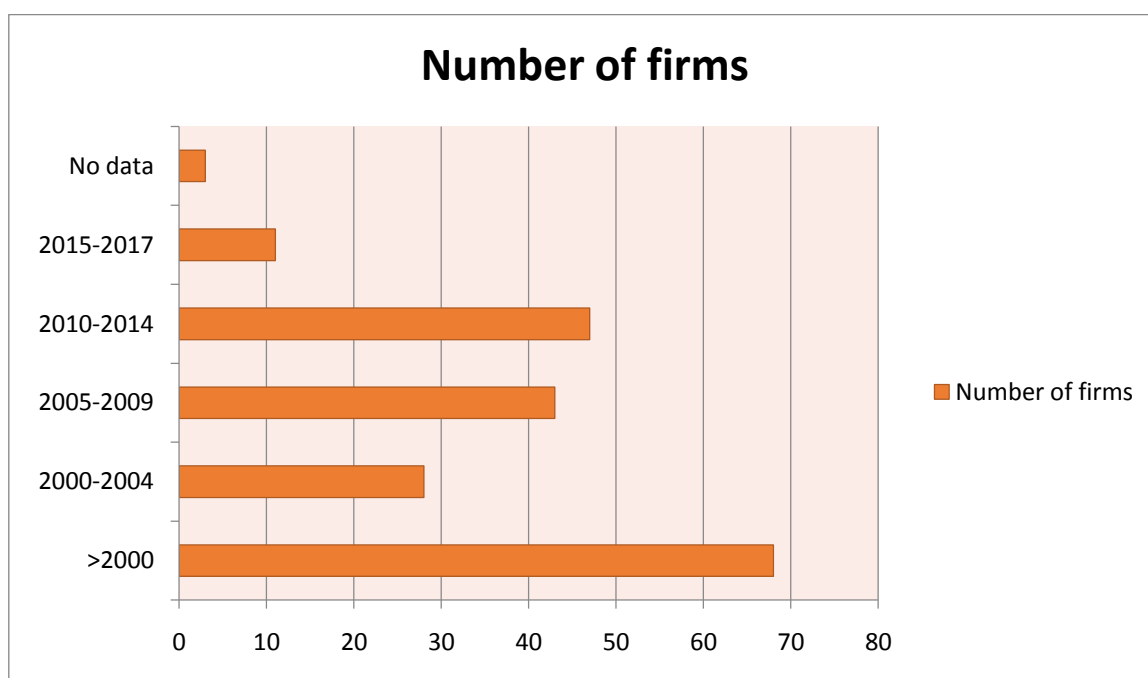
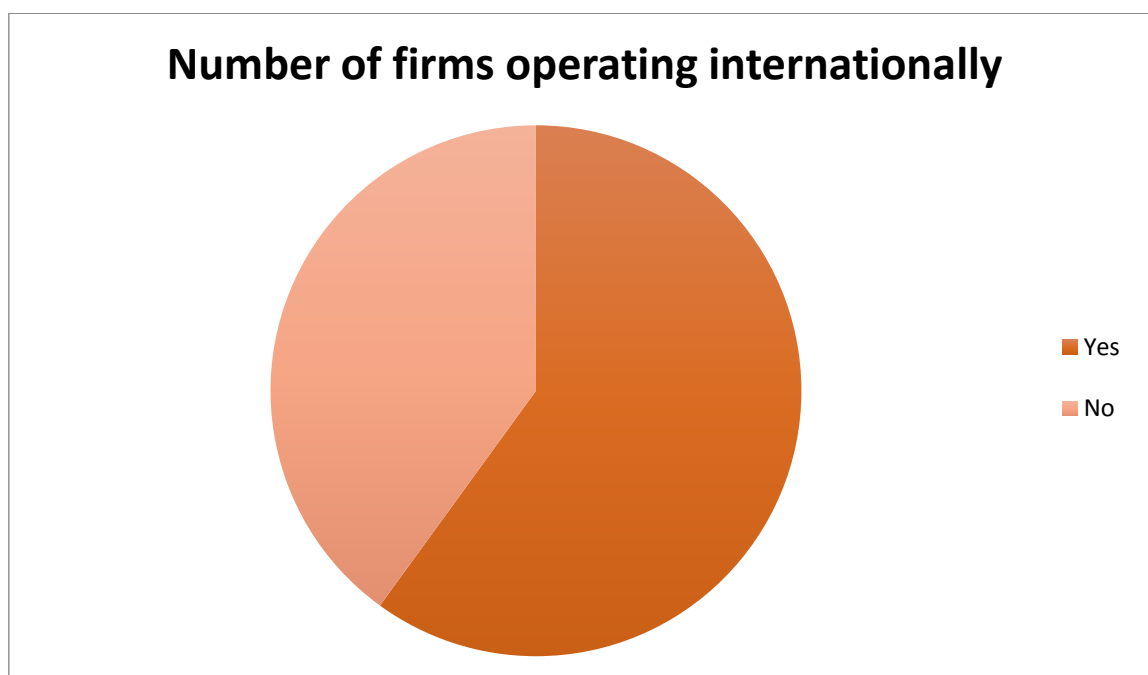


Figure 24: Number of Portuguese (Lisbon) firms operating internationally



The international dimension to Lisbon based companies' outlook is illustrated in Figure 24 with 120 of the 200 organisations surveyed recording that they operated in international markets. The cluster of expertise across numerous CCI activities has drawn the attention of the international community and offered opportunities for Lisbon based enterprises to

exploit demand abroad. This trend forms an important part of the strategy to grow the CCI in Lisbon and to demonstrate an outward look, cosmopolitan and enterprising city. Key to delivering this is the collaboration between private business and the public sector to enhance the infrastructure, support, finance and promotion of all the creative economy endeavours. In many ways, Lisbon represents an exemplar of what is possible when these collaborations work effectively for the benefit of business, and civil society.

Mapping the Cultural and Creative Industries in the Atlantic Area: finding and analysis



The Atlantic Area CCI mapping exercise comprised six regions including South West Scotland, Southern Ireland, Pays de la Loire in France, Asturias and Andalucia in Spain and Lisbon in Portugal. A total of 638 organisations responded to the survey. Table 7 outlines the number of respondents by region:

Table 7: Number of respondents to the mapping survey by region

Region	Number of respondents
South Western Scotland	100
Southern Ireland	63
Northern France (Pays de la Loire)	113
Asturias (Spain)	53
Andalucia (Spain)	109
Lisbon (Portugal)	200
TOTAL	638

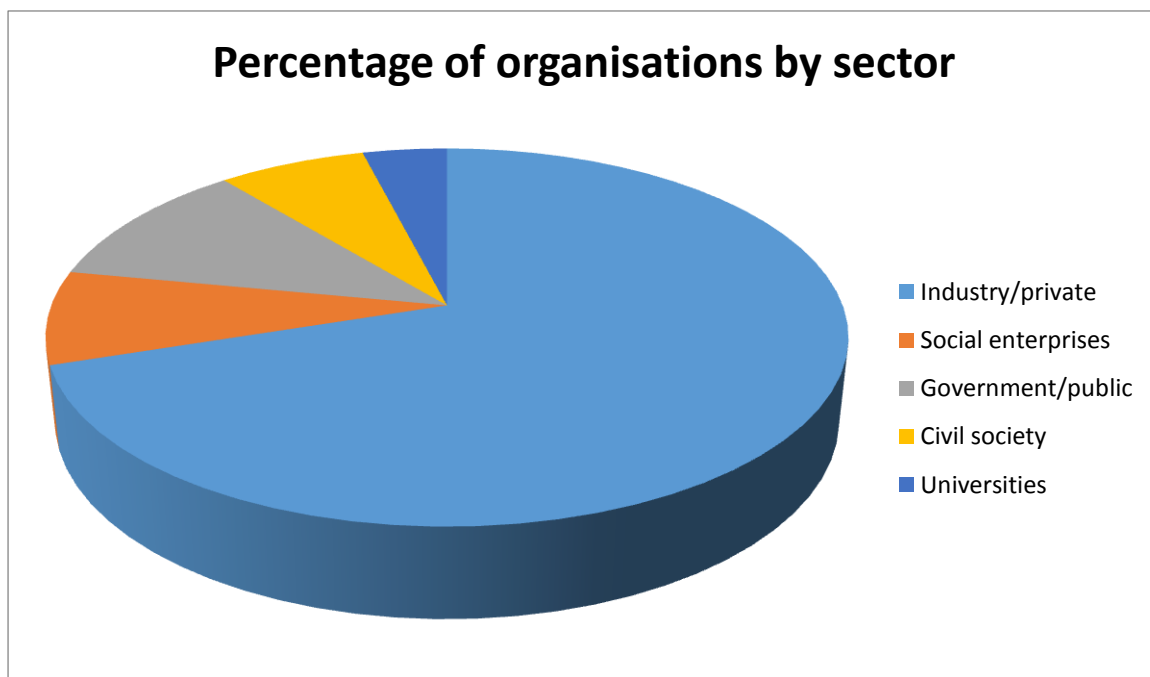
Table 8 outlines the number of respondents by sector for each region. Of the 638 respondents, the majority were small-scale private sector commercial companies. In total 70% of respondents came from this type of organisation with each region registering high numbers from this source. The government or public sector plays a key role in the support and development of the creative and cultural industries across the Atlantic Area with 11% of respondents coming from this source. Although social enterprises are becoming more prevalent due to acute need to address a range of social problems in the Atlantic Area, they still only account for 8% of respondents. The remaining respondents comprise civil society organisations and universities.

Table 8: Number of organisations by CCI sector for each region

Sector	Scotland	Ireland	France	Asturias	Andalucia	Lisbon	Total	%
Industry	80	32	83	37	63	150	445	70
Social	4	4	9	4	4	26	51	8
Public	8	3	13	9	21	16	70	11
Civil	6	24	0	1	16	0	47	7
University	2	0	8	2	5	8	25	4
Total	100	63	113	53	109	200	638	100

The data for the number of respondents by CCI sector in the Atlantic Area regions is illustrated in Figure 25. Clearly, the private sector dominates activity with each of the regions recording high levels of activity in this sector. New technology, increasing demand, and sophisticated infrastructure alongside local government support have all made significant contributions to increasing the number of enterprises entering the CCIs across the Atlantic Area.

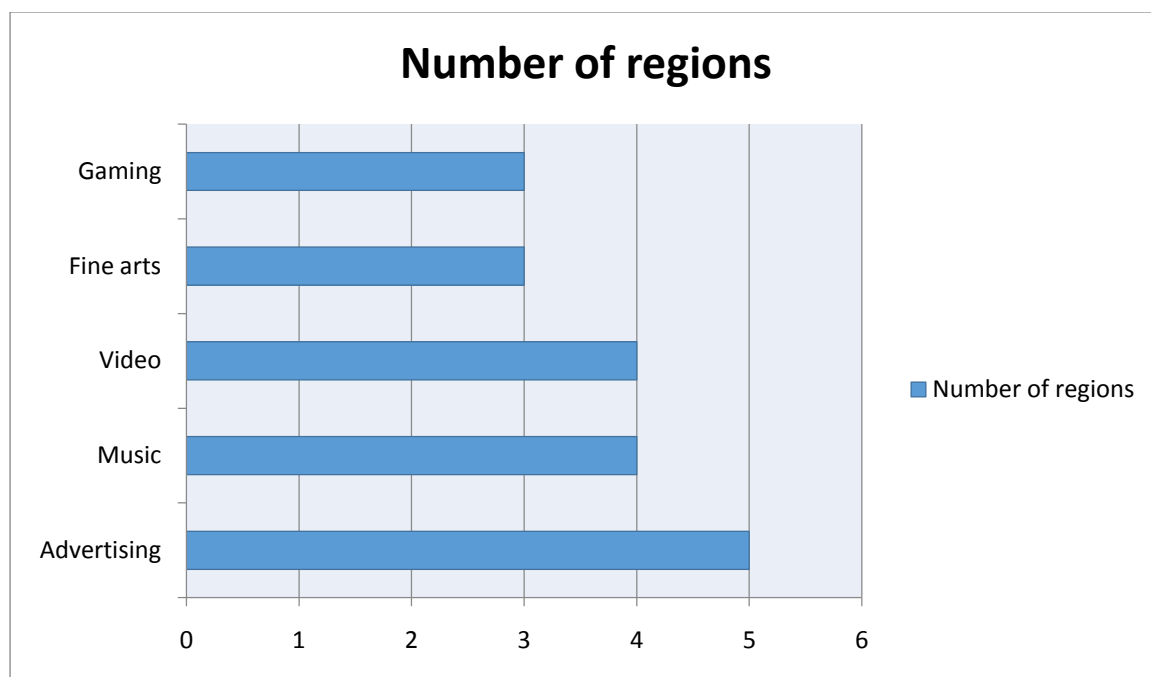
Figure 25: Percentage of organisations by sector



The survey revealed a broad range of different activities across the CCIs in the Atlantic Area with all the categories listed in Table 1 represented to varying degrees. Many of the cultural activities such as orchestras, dance and museums require government funding to maintain service delivery as the private sector tend only to offer supporting roles in these such as sponsorships or touring collaborations. The private sector dominates the CCIs with many small-scale enterprises engaged in many different outputs and support services. Figure 26 illustrates the top five most prevalent CCI activities in the Atlantic Area with advertising featuring most frequently, followed by companies delivering content or support services in the music industry and video/audio services to the broadcasting industry. Fine arts also feature prominently across the CCIs in the Atlantic Area but most frequently in Spain and Portugal. Some regions reveal specialist activities that reflect the way in which the CCIs have been supported and where clusters of expertise have emerged. In Spain for example, the music industry features prominently across Andalusia; in Scotland the gaming industry has emerged as a world leading centre of excellence; in Lisbon the music and fashion industries are gaining a high profile while fine arts feature prominently in the Pays de la Loire region of

France. In Ireland the graphic design and animation industry has received much attention and is reflected in the number of collaborations between the private sector and universities where specialist courses in animation have been developed.

Figure 26: Top five most prevalent CCI activities in the Atlantic Area



The range of activities outlined in the data for each of the regions in the survey suggests a growing and vibrant CCI in the Atlantic Area even though the intensity and scale of activity tends to vary. It is clear that the CCI has grown since 2000 with many new opportunities emerging, creating employment and promulgating growth across the sector. Although a few large-scale corporations operate in most of the region, the vast majority of respondents were small-scale enterprises offering specialist content or support services for the CCIs. Figure 27 illustrates the trends across the Atlantic Area with around 45% of all companies employing 5 or less employees. In some regions, such as in Lisbon, there is evidence of more companies of a larger size beginning to emerge. Lisbon has demonstrated an ability to develop the creative economy around a specific strategy for growth and this has enabled companies to expand and employ greater numbers of workers in the ranges between 11 and 50 which constitutes a relatively large size of business in the context of the CCIs. All the data presented points to growth across the CCIs in each of the regions and reflects the increasing opportunities presented by new technologies, industry support and increasing levels of demand both domestic and internationally. This is further evidenced by the number of new entrants emerging across the CCIs in the Atlantic Area since 2000. Table 9 presents the data for the timeframes in which respondent organisations were established and Figure 28 illustrates the data.

Figure 27: Size of organisation by percentage of employment in CCI in the Atlantic Area

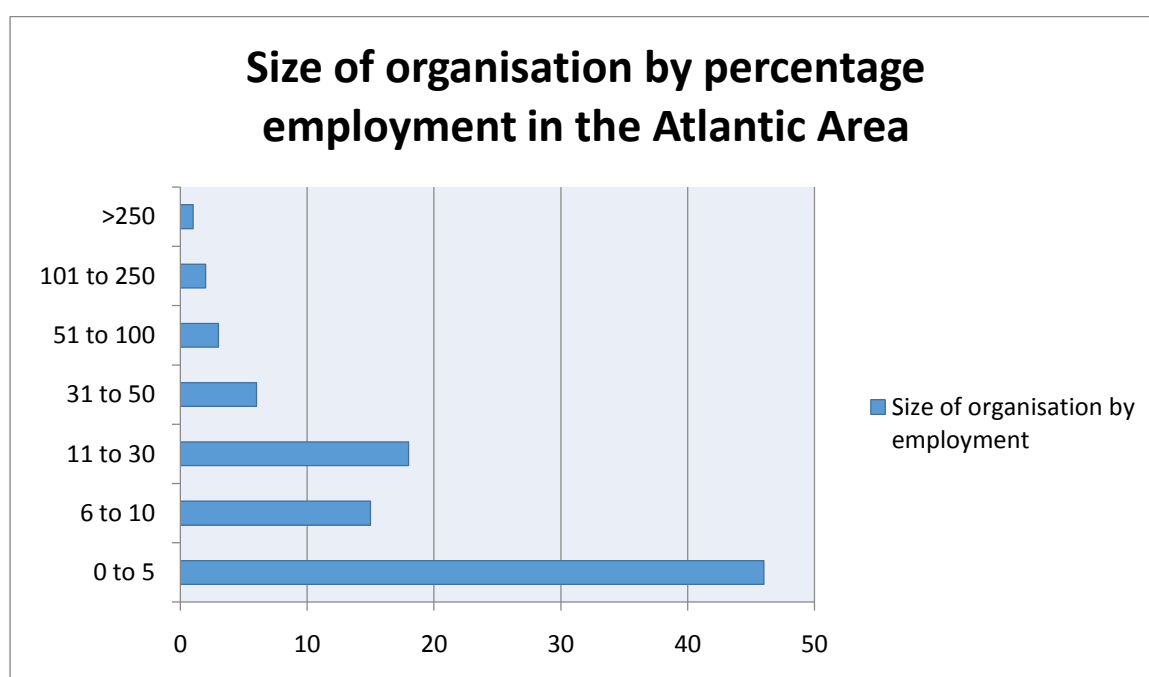
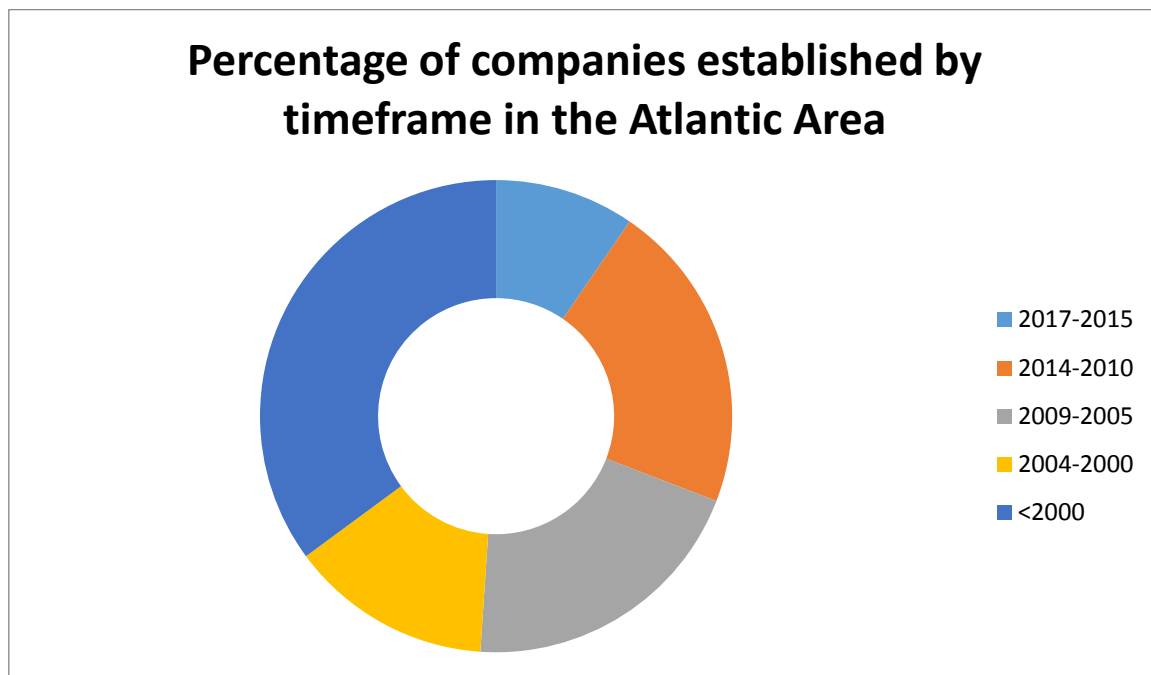


Table 9: Year established for CCI firms in Atlantic Area regions

Timeframe	Scotland	Ireland	France	Asturias	Andalucia	Lisbon	Total %
2017-2015	3	13	8	6	19	11	9
2014-2010	23	6	17	14	20	47	20
2009-2005	19	12	17	7	23	43	19
2004-2000	15	9	15	5	12	28	13
<2000	38	23	32	16	35	68	33

Around one third of all companies in the survey were established prior to the year 2000 suggesting a maturing industry but with scope for growth and development. The trends in the other timeframes point to increasing numbers of new entrants into the CCIs across the Atlantic Area with all regions showing an increase from 2000 through to 2009. The rate of increase slowed in the post financial crisis of 2009 especially in Spain and Portugal. Nevertheless, the data shows an upward trajectory for new entrants into the CCIs which points to a sector that continued to attract investment and entrepreneurs seeking to exploit new technologies for new products and services as well as delivering services and content for traditional types of creative and cultural demand at home and abroad. The recovery of the CCI sector across the Atlantic Area was reflected in the data for the 2010 to 2014 period where most regions registered an increase in the number of new entrants. This was particularly the case in Scotland when 23 new companies emerged and in Asturias where the number of new entrants doubled from 7 in the previous timeframe to 14 in 2010 to 2014.

Figure 28: Percentage of companies by year established timeframes



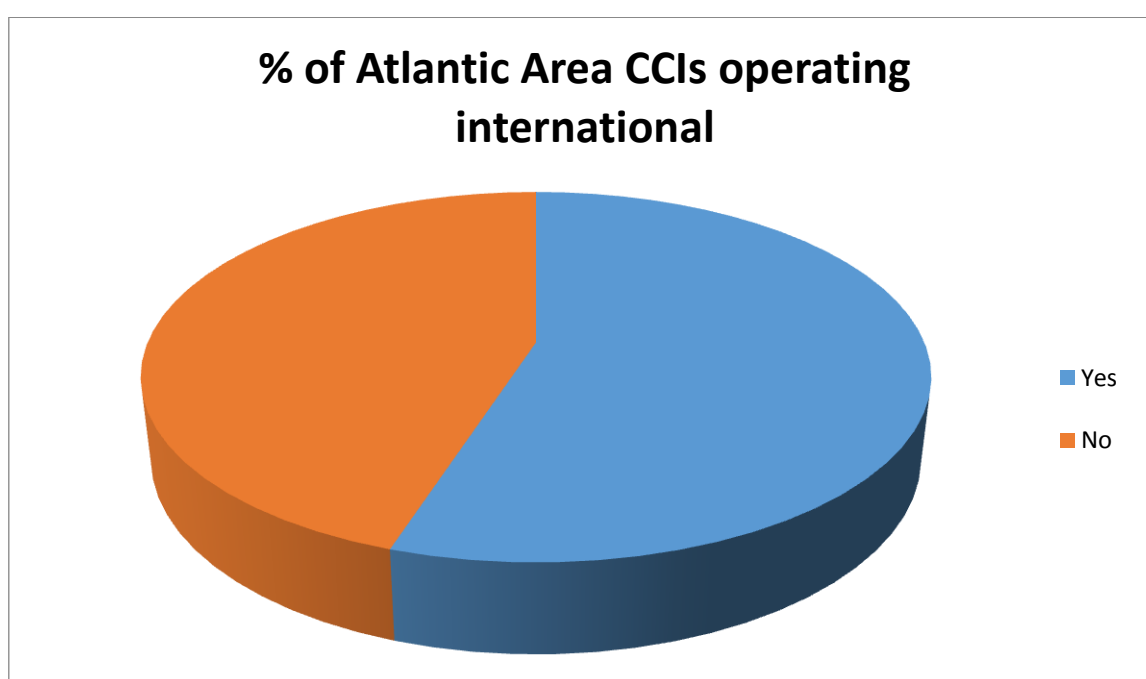
One important factor driving growth across the CCIs in the Atlantic Area is the ability of companies to identify and exploit opportunities in international markets. Table 10 presents the data for companies operating internationally across the regions of the Atlantic Area. Figure 29 shows that 55% of companies surveyed operated internationally. In this context the data shows mixed results with some regions faring better than others. In Scotland, there is almost an equal split between firms operating internationally and those with only domestic markets. Ireland is largely domestic oriented with only 14 out of 53 companies operating internationally. Similarly, in the Pays de la Loire region of France around two thirds of companies focused only on domestic markets. This is seen as a drag on the development of the sector and is recognised in the Action Plan as a weakness to be addressed. In contrast, companies in Asturias tend to have an international outlook with almost half of all companies noting that they undertake trade abroad. This was particularly the case in Andalucia with 92 out of 100 companies responding that they operated internationally. In Lisbon around 60% of companies operated internationally. In some instances, (such as in France) the strong domestic demand is sufficient for companies to thrive whereas in others (such as Ireland) a greater emphasis on reaching out to global markets is essential for sustaining the growth of the CCI sector.

The benefits of having an international focus to the development of the CCI sector can be seen in Spain and Portugal where specific strategies for development have included positioning the regions effectively within an international context. The number of international events and festivals across various CCI sectors in these regions is testimony to the global aspirations of all stakeholders. Collaborations with international partners form another important element of the strategy and the support agencies in all the regions have been proactive in generating collaborative ventures in Europe and beyond.

Table 10: Atlantic Area CCI companies operating internationally

	International	Domestic	% of companies	No data %
Scotland	51	48	100	0
Ireland	14	41	87	13
France	44	63	95	5
Asturias	32	9	77	23
Andalucia	92	17	100	0
Lisbon	120	80	100	0

Figure 29: Percentage of Atlantic Area CCIs operating internationally



The mapping of CCI sector organisations in the Atlantic Area has revealed some important data and information that helps better understand a range of characteristics including the range of different activities undertaken, company size, employees, new entrants to the sector over different timeframes, and the extent to which companies operate internationally. Although just a snapshot of the overall CCIs in each of the regions, the data has provided some useful insights into the way in which the sector has developed and grown and the trends that underpin this. The final section provides a brief summary of key findings from each of the Atlantic Area regions.

Summary

The mapping of the CCIs in the Atlantic Area comprised six regions and this final section provides a brief summary of the key findings for each of those.

Scotland

The survey showed that Scotland has a well-developed creative economy with a wide range of different activities, some of which receive state aid via *Creative Scotland* such as ballet and the *Scottish National Orchestra*. However, the majority of output in the CCIs in Scotland comes from a vibrant and innovative private sector comprising many small-scale enterprises looking to exploit markets at home and abroad. Technology has played a key role in encouraging new entrants into the sector with gaming development becoming a world-class industry. There are also opportunities for companies along the supply chain of broadcasting with video/audio and other service support companies featuring as part of a trend towards small-scale companies delivering specialist output or services. There is also an international dimension to the operations of companies across the CCIs, although with around half the companies surveyed stating they did not target foreign markets, there is scope for extending the reach of the sector to remain competitive in future.

Ireland

The creative economy in Ireland has benefited from the *Creative Ireland* programme that specifically focuses attention on those areas that allow the sector to grow and flourish. There has been an increase in the number of new small-scale enterprises entering the sector with new technologies proving the catalyst for an upsurge in activity around graphic design, animation and gaming in particular. The programme runs to 2022 so it is too early to judge its effect. However, it has led to investment in infrastructure and rolled out initiatives across the country to raise the profile of the creative arts. Ireland has a vibrant domestic market for its creative outputs but lags behind other regions in the Atlantic Area in terms of international reach. This is an aspect of development that support agencies have highlighted and features specifically in the *Creative Ireland* programme.

France (Pays de la Loire)

Of all the regions in the Atlantic Area survey, the Pays de la Loire has the most robust domestic CCI with many different activities supporting demand in the region and more broadly across France. The cultural activities are particularly in demand with fine arts and museums proliferating across the country. Enterprises in the Loire region have been able to access those markets successfully and attained growth on the back of high levels of demand. However, based on the survey the region does not have an international reach on terms with others and this is an opportunity missed. The strong cultural element to the outputs

and support services that the companies in the region deliver would find favour in foreign markets if promoted and adapted accordingly. Also, the wealth of knowledge and expertise built around the development of the CCI in the region is a valuable transferable asset that has yet to be fully exploited.

Spain (Asturias)

Since 2014 the region of Asturias has benefited from an action plan to improve the infrastructure of the creative economy with government grants and other capital sourcing initiatives implemented by government. The results are beginning to emerge with greater investment in the creative economy through the application of technology and support for innovation. Despite severe economic pressures in 2009, the region has been able to galvanise resources to encourage entrepreneurship in the sector with increasing numbers of small-scale businesses entering the sector by providing specialist services and content. Importantly, enterprises in the region have demonstrated an outward looking perspective with a large proportion operating internationally in areas such as video/audio, broadcasting services, and architecture. There is also a strong cultural element to the CCI with fine arts and the performing arts featuring prominently in the numerous events held annually in the region. The development of the Cultural Factory facility in Aviles has attracted international attention around the myriad events and exhibitions hosted each year.

Spain (Andalucia)

The region of Andalucia, and in particular the city of Seville, has become one of Europe's recognised creative and cultural centres with many different events and exhibitions hosted throughout the year including dance, fashion, music and film. The city has adopted a proactive approach to leveraging advantages from the investment in the arts and this has been the catalyst for many entrepreneurs setting up businesses to service the demand for content and support services. The region has seen an increase in the number of businesses entering the sector and creating jobs in an area that has been blighted by youth unemployment since the financial crisis of 2009. The investment in the arts has ensured that Seville remains an important hub for creative output and is now one of the most important sectors of the regional economy. This is particularly the case with the music industry with many high profile events and concerts organised throughout the year to attract international attention and ensure that Seville builds a reputation as a centre of excellence in supporting this creative activity.

Portugal (Lisbon)

Of all the regions in the survey it is clear that the city of Lisbon has the most ambitious plans to position itself as the major European city for the creative and cultural arts. The city has a diverse range of creative activities with music, publishing, fashion and fine arts featuring

prominently. The city authority has been proactive in building the reputational capital of the city as a magnet for talent not just in Portugal but from across the globe. Festivals, events, exhibitions, performances and presentations feature all year round covering a multitude of creative outputs. The intensity of the activity has attracted a great deal of attention from entrepreneurs seeking to exploit the commercial opportunities that this presents and this is reflected in the upward trend in the number of companies setting up in the area and the attendant new jobs that creates. Lisbon is increasingly viewed as an important venue for many of the world's leading artists thereby adding to the high reputational capital that the city enjoys.

4H CREAT mapping report

This report has been compiled using data generated by the partners on the 4H CREAT project. The report set out the aims and objectives of the project and the highlighted the action plan linked to the mapping exercise. The key deliverables for this part of the project were formally set out in order to lend context to the reasons why the mapping exercise was deemed necessary. There followed a definition of the creative and cultural industries and a list of agreed activities was included. This helped to set the parameters of the investigation and survey as the CCIs now comprise many different activities, some of which overlap into technology-based activities (such as gaming).

Six partner regions of the Atlantic Area participated in the mapping exercise, each working from an agreed and specially designed template. The template focused attention on the types of organisations involved in the CCIs across the Atlantic Area; the range of different CCI activities evident in the regions; the size of companies by employment; the timeframes when the companies were established and the level of international activity by the participating companies. This report provides a snapshot of the 'state of play' of the development of the creative and cultural industries in each of the regions with a view to determining key trends, areas of strengths and weaknesses, and the overall direction of growth across the region for this important cultural and economic set of activities. The report has presented findings for each of the partner regions and the composite report draws together the overall results from across the Atlantic Area. As a snapshot there is scope for a more detailed account of the emerging trends, but this report has delivered a valuable contribution to understanding the characteristics of CCI activities across the Atlantic Area.

Additional sources

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