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TRansnational **A**ccelerator for a **C**ultural and **C**reative **E**co**S**ystem

Asse prioritario
1 – Innovazione e competitività

WP3 - CC MSMEs' CROSS-BORDER INCUBATION DEMAND AND OFFER ANALYSIS, ENGAGEMENT AND INTEGRATED DELIVERY

D.3.1 - CC MSMEs mapping report

Project Title	**TR**ansnational **A**ccelerator for a **C**ultural and Creative **E**co**S**ystem
Project Acronym	TRACES
Programme	Cooperation Programme Interreg V/A Greece-Italy (EL-IT) 2014-2020 - Co-financed by the ERDF
Priority Axis	1 - Innovation and Competitiveness
Investment Priority	3a-Promoting entrepreneurship, in particular by facilitating the economic exploitation of new ideas and fostering the creation of new firms, including through business incubators
Specific Objective	SO1.2-Supporting the incubation of innovative specialized MSMEs in thematic sectors of interest to the Programme Area
Partnership	LB - University of Salento – Department of Management and Economics PB2 - Tecnopolis Science and Technology Park, PB3 - Creative Apulia Cluster Association, PB4 - Hellenic Management Association PB5 - Chamber of Achaia. Associated partners: ENCATC – European Network on Cultural Management and Policy Foundation for Ethical Finance

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Section A - Aim and methodology of the study

In the framework of the TRACES project activities, this study aimed at mapping the CC MSMEs potential in the project area.

To this end, the implementation objectives were:

a) To define the cultural and creative sectors under investigation assuring the relevance and comparability of the study with the existing literature and reports;

b) To map the CC MSMEs specialization in the project area, precisely in the Regions of Apulia, Italy and Western Greece;

c) To identify the local CC MSMEs' features, challenges, and development needs through applying a cross-border approach.

As for the objective a), the project's joint team carried out desk research and benchmark of the main approaches actually in use to identify the typologies of economic activity that can be classified as cultural and creative enterprises. The main results are described in section B.

The generated information from the desk research was used as the basis for the selection of the appropriate methodology and for the identification of the aspects to be included in the study. Guided by this information, data collection and its secondary statistical analyses were summarized using a descriptive approach to meet the objective b). The main source was the registry of the Chambers of Commerce in the project area. Data provided were subject to a prior normalization process to assure pertinence to the sector and comparability between the two regions involved in the project context. The data elaboration concerned the descriptive statistics of the CC MSMEs population in terms of value-added, jobs, localization, and legal form.

Further data processing was necessary to calculate and represent the Florence's Index of each economic activity falling in the cultural and creative sectors of the project area, consequently identifying the regional specialization according to a cross-border approach. The main results are described in section C.

Furthermore, in order to respond to the above-mentioned objective c), a qualitative survey was carried out through the focus group tool. In doing so, a preliminary literature review was made aiming at identifying the specific features of the sector under investigation according to specialized literature available to date. This was necessary to develop the guide of focus groups as described in section D of this report. Six focus groups, involving about 80 Apulian enterprises and 34 Western Greek enterprises were organized to collect relevant data, which were subject to a secondary analysis using a statistical descriptive approach.

Section B - Defining the CC MSMEs perimeter

This section describes the main aspects emerging from the desk research we carried out about the relevant literature and illustrates the CC MSMEs perimeter adopted to map the CC MSMEs in the project area.

The activities included in different categories such as *cultural industry*, *creative* or *industrial and creative industries* are largely contiguous and sometimes they are coinciding. Often these labels are considered synonymous or interchangeable. Such a claim produced the need to achieve recognition of the meaning and exact components of cultural and creative industries. Especially after missing the agreement on what should be the criteria to identify the CCI sector and what is the accurate measurement to weight each of them as well. Hence, there was a diversity of theories and methods that were broadly adopted to cover this issue at national and international levels.

Horkheimer and Adorno, alumni of the Frankfurt school, used the term *Cultural industries* for the first time. Firstly used to distinguish the artisan character of art from mass production, this term gave a new conception of contiguity: the presence of art, as a field to which cultural policies should be broadened and influenced the cultural world industry. The model of the Creative Industries Task Force (CITF) of the British Department of Culture, Media and Sport (DCMS) was, in fact, the primary intellectual effort of the practical definition of the CCI sector. It was born during the XX century in England by studying the New Labor to reposition the British economy worldwide as an economy driven by creativity and innovation.

In this model, the creative industries are those industries that present the features of creativity, skills and talent as their main input of the production process, and that express their potential for creating wealth and jobs through the enhancement of the rights of intellectual property (CITF, 1998, 2001)[1]. In the early defining documents of the sector, the activities of the CCI sector are frequently described as those based on individual creativity. In fact, regardless of the origin of the definition, the label is, in broader terms, the *creative economy,* which involves "*an evolving concept based on creative assets potentially generating economic growth and development*". The UK Creative Industries Mapping Document defines the CCIs as "those activities which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property" [2].

There are 13 activities included in the DCMS classification. To describe this classification, DCMS has preferred to use the term "creative industries" to avoid confusing the sector with "high" culture in the strict sense, which in the UK at the time boasted a long history of public and non-public funding. DCMS selected the activities taking into account two guiding criteria: the level of creativity embedded in the products or in the processes, and their level of competitiveness on the world market. On this basis, the DCMS included the following activities in the creative industries: **Advertising, Architecture, Art** and **Antiques Market, Crafts, Design, Fashion, Film** and **Video, Music, Performing Arts, Publishing, Software, Television** and **Radio, Video** and **Computer Games**.

This model is the one used as a perimeter in Europe by the European NACE's definition.

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[1] Galloway S., Dunlop S., *Deconstructing the concept of 'Creative Industries'.* Cultural Industries: The British Experience in International Perspective, 2006.
http://eprints.gla.ac.uk/5243/ Deposited on: 15 May 2009

[2] *Creative Industries Mapping Document 2001*, London: Department for Culture, Media and Sport, 2001. (Nomenclature statistique des activités économiques dans la Communauté européenne)

Otherwise, UNESCO[3] defines *Cultural and Creative industries* as activities "whose principal purpose is production or reproduction, promotion, distribution or commercialization of goods, services and activities of a cultural, artistic or heritage-related nature".

The UNESCO framework wanted to propose a model to overcome some of the oppositions and dichotomies that regularly re-emerge in the debate on cultural policies and in supporting the CCIs. In particular, the conflict between the cultural dimension and the economic and social dimensions, the conflict between supporters of private financing and governance arrangements and supporters of public financing and governance, and the controversy about the degree of institutionalization of cultural production. According to this definition, there is a classification of these cultural and creative industries in 11 sectors: **Advertising, Architecture**, **Books**, **Gaming**, **Music, Movie**, **Newspapers and magazines**, **Performing Arts**, **Radio**, **TV**, **Visual arts**.

During the 90s, with the growing interest in the economic potential of culture, there was a clear awareness of the lack of adequate statistical information to investigate the issue of the CCI sector. Thus, in 1997, the European Commission sent a specific task force - LEG-Culture - to address the task to identify and aggregate the cultural statistics produced by the various countries of the European Union, in order to be able to make comparisons between the international companies. The starting point for the project LEG-Culture is the framework produced by UNESCO in 1986. After a little over 20 years from the experience of UNESCO, the need to update the conceptual framework also stemmed from the need to adequate it for a rapidly evolving reality.

The LEG-Culture approach, therefore, identifies eight cultural domains and six functions, crossed in a matrix. The eight cultural domains are as follows: **Cultural heritage** (historical monuments, museums, archaeological sites, etc.); **Archives**; **Libraries**; **Books and periodical press**; **Visual arts** (including design); **Architecture**; **Dramatic arts** (music, dance, musical and dramatic theatre, etc.); **Audio and audio-visual/multimedia products** (cinema, radio, television, video, audio recordings, multimedia works). On the other hand, the six functions are: **Conservation** (all actions aimed at protecting, restoring and maintaining assets); **Creation** (the invention of original works that usually entitle the payment of royalties); **Production** (the ways in which the original work is made available to the public); **Distribution** (including the organization and promotion of events); **Trade/sales**; **Training**.

One of the most recent taxonomies proposed to outline the perimeter and size of the ICC sector is the European Statistical System Network on Culture definitions (ESSnet-Culture, 2012). This network of experts moved from four specific objectives:

1. Reviewing the perimeter of the cultural industry defined in 1997 by the LEG-Culture;
2. Reviewing the existing methodological bases to improve European cultural statistics;
3. Defining indicators and variables to describe and study the cultural sector in all its complexity;
4. Improving data analysis based on individual national experiences.

ESSnet-Culture published its final report in 2012. The activities introduced into the CCIs' perimeter are **Heritage** (Museums, historical sites, archaeological sites, intangible heritage); **Archives**; **Libraries**; **Books and press**; **Visual arts** (plastic arts, photography, design); **Performing arts** (music, dance, theatre, and other live performances); **Audio-visual and multimedia** (film, radio, television, video, sound recording, videogames); **Architecture**; **Advertising**; **Artistic craftsmanship**.

There are also other models like:

[3] *Cultural times - The first global map of cultural and creative industries*, EY report, 2015.

– Concentric Circles model: this model emphasizes that creative ideas originate in the core creative arts in the form of sound, text and image and that these ideas and influences diffuse outwards through a series of layers or concentric circles, with the proportion of cultural to commercial content decreasing as one moves outwards from the center.

– WIPO copyright model: according to this model, creative industries are businesses involved directly or indirectly in the creation, manufacture, production, broadcast and distribution of copyrighted material.

– UNCTAD model: this represents an extension of the concept of 'creativity' from activities having a strong artistic component to "any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible".

– National Endowment for Science, Technology and the Arts (NESTA) model: this model was created to further refine the DCMS model of creative industries for policy purposes under the auspices of a national policy review for the sector entitled the Creative Economy Program. It incorporates greater awareness of the differences between and within sectors, and is intended to draw out commonalities based on how commercial value is created, where this value is located, and consequently how it can be enhanced. This model places the creative industries at the heart of a wider economy that increasingly relies on creative processes and services for its competitiveness. It augments analysis in the report The Economy of Culture prepared by KEA European Affairs for the European Commission (2006), which explores the relationship between the creative industries and the less profit-driven cultural sector.

– Conference Board of Canada/Statistics Canada model: developed in 2008, this list of industries and activities was a first step in measuring and understanding Canada's creative economy. It closely reflects John Howkins' understanding of the creative industries as well as the UK's earlier DCMS model.

In the end, Symbola Foundation[4] classifies the various economic activities in four macro-sectors, corresponding to the variety of production of economic value based on culture and creativity and representative of all the possible interactions between culture and economy. The four macro-sectors are as follows:

1. **Cultural industries**: including activities related to the production of goods closely related to the main artistic activities with high creative content, such as cinematography, television, the publishing and the music industry;
2. **Creative industries**: all those productive activities with a high creative content that carry out additional functions compared to the mere cultural expression. The main components of this macro-sector are: architecture; communication and branding (as far as communication and image aspects are concerned); moreover, among the activities related to this macro-sector are also the most expressive of Italian enogastronomy, unique and appreciated in the world, which also manifests itself through specific catering activities;
3. **Historical-artistic architectural heritage**: the activities, carried out in the form of a business, having to do with the conservation, fruition and valuing of the heritage, both in its tangible dimensions and intangibles (museums, libraries, archives, management of places or monuments, etc.);
4. **Performing arts and visual arts**: the activities that, by their nature, do not lend themselves to an industrial model of organization, or because they deal with intentionally non-reproducible goods (the visual arts) or because they have to do with live events that can only be enjoyed through direct participation.

[4] *L'Italia della qualità e della bellezza sfida la crisi, Fondazione Symbola, 2013.*

In this context, according to the definitions that literature has provided of cultural and creative industries, it has been decided to carry out the study by taking as a basic definition the one prepared by Symbola Foundation. Along with that, the Cultural and Creative Production System is composed of productive activities, which are partially attributable to the sectors of the cultural and creative dimension (Core activities: Cultural industries, Creative industries, Historical-artistic architectural heritage, Performing arts and visual arts).

The perimeter is made possible using the European Nace Rev. 2 classification of the sectors to fine sectoral detail. The 44 classes of economic activity selected that represent the "heart" of the Cultural and Creative Production System. The same perimeter is used by previous mapping reports realized for the Apulia Region and it is similar to that used in the latest Greek report about the sector[5].

Table 1 shows the Cultural and Creative Sector Perimeter including the typologies of economic activities which this study adopted to map CC MSMEs in the project area.

Table 1 – Cultural and Creative Sector Perimeter

Sector	Sub Sector	NACE code	Business Activity
Cultural Industries	Film, video, radio and tv	59.11	Motion picture, video and television programme production activities
		59.12	Motion picture, video and television programme post-production activities
		59.13	Motion picture, video and television programme distribution activities
		59.14	Motion picture projection activities
		60.10	Radio broadcasting
		60.20	Television programming and broadcasting activities
		77.22	Renting of video tapes and disks
	Videogames and software	32.40	Manufacture of games and toys
		58.21	Publishing of computer games
		58.29	Other software publishing
		62.01	Computer programming activities
		63.12	Web portals
	Music	18.20	Reproduction of recorded media
		26.40	Manufacture of consumer electronics
		32.20	Manufacture of musical instruments
		47.63	Retail sale of sporting equipment in specialised stores
		59.20	Sound recording and music publishing activities
	Books and printing	18.11	Printing of newspapers
		18.12	Other printing
		18.13	Pre-press and pre-media services
		18.14	Binding and related services
		47.61	Retail sale of books in specialised stores
		47.62	Retail sale of newspapers and stationery in specialised stores
		58.11	Book publishing
		58.13	Publishing of newspapers
		58.14	Publishing of journals and periodicals
		58.19	Other publishing activities
		63.91	News agency activities
		74.20	Photographic activities
		74.30	Translation and interpretation activities
		90.03	Artistic creation
Creative Industries	Architecture	71.11	Architectural activities
	Communication and branding	70.21	Public relations and communication activities
		73.11	Advertising agencies
		73.12	Media representation
		82.30	Organisation of conventions and trade shows
	Design	74.10	Specialised design activities
Performing Arts	Performing arts, recreation activities, conventions and trade shows	85.52	Cultural education
		90.01	Performing arts
		90.02	Support activities to performing arts
		90.04	Operation of arts facilities
Heritage	Museums, Libraries and archives, Operation of historical sites	91.01	Library and archives activities
		91.02	Museums activities
		91.03	Operation of historical sites and buildings and similar visitor attractions

[5] *Mapping the Cultural and Creative Industries in Greece*, Hellenic Ministry of Culture and Sports, 2016, p. 32.

Section C – Descriptive statistics of CC MSMEs in the project area and regional specialization

This section reports the relevant descriptive statistics of the CC MSMEs in the project area and the regional economic specialization in the cultural and creative sectors according to a cross-border approach.

As for the descriptive statistics of the CC MSMEs in the project area (section C.1), this report sums up the relevant data and findings resulting from:

- the analysis and report commissioned by Apulia Creative Cluster Association to Fondazione Symbola as for the CC MSMEs in the Apulia Region, to which this report refers for any further information[6];

- the *Mapping of the Cultural and Creative Industries in Greece*, Hellenic Ministry of Culture and Sports, 2016, provided by the Chamber of Achaia, and the recent context analysis within the SPARC project[7], particularly as for data regarding the contribution of the cultural and creative sectors to the GDP and jobs in Greece and Western Greece;

- the data collection and analysis jointly made by the University of Salento and the Chamber of Achaia as for the CC MSMEs localization, number and legal status in Western Greece.

Regarding the regional economic specialization in the cultural and creative sectors according to a cross-border approach, this report offers the main results of the joint research made by the University of Salento, the Apulia Creative Cluster Association and the Hellenic Management Association, using the Florence's Index methodology on primary data extracted from the registers of the Chambers of Achaia and Apulia on the 25th July 2018, regarding companies whose primary NACE code belonged to the CCI's sector perimeter and the companies with secondary NACE code belonging to the category and with a maximum of three secondary activity. The total number of CC MSMEs registered and investigated for this purpose was: 13.602 in Apulia Region and 3.359 in Western Greece.

C.1 Descriptive statistics of the CC MSMEs in the project area

This part of section C reports relevant data and comments about the number and the legal status of cultural and creative enterprises localized in Apulia and Western Greece, as well as their contribution to the regional GDP and workforce.

In 2017, according to the data published by Infocamere[8], the working CCIs through Apulia were 13.602; this data represents the 3,6% of the entire regional productive system; it is 1% less than for the national average.

The most of the Cultural and Creative Entrepreneurial System is located in the provinces of Bari (4.993 units) and Lecce (3.062 units), whose weight nearly reaches the national average (respectively 4,3% and 4,2%).

Over half of the companies working in the cultural core are cultural industries (55% of the sector). 7.552 units which, for the most part, operate in the publishing – 40% of the productive basis; in absolute terms, there are 5.457 industries. The provinces of Barletta-Andria- Trani and Brindisi are specialized in the publishing sector

[6] Fondazione Symbola, We are Creative in Puglia, Rapporto sulle imprese culturali e creative in Puglia, 2019, commissioned by the partner Puglia Creativa according to the Traces project task.
[7] Project SPARC - Creativity Hubs for Sustainable DeveloPment through the VAloRization of Cultural Heritage Assets – Context Analysis – Deliverable 3.3.1 – Version 1.0, Programme Interreg Greece-Italy 2014-2020, Patras 31/05/2019.
[8] Infocamere is the informative consortium of the Italian Chambers of Commerce and it manages the national computerized system among all the Chambers of Commerce and the 300 field offices. It provides the computerized managing of the Register of Companies.

(respectively 44.9% and 44.8%). The creative industries are 5.162, equally allocated in architecture (2.414 units) and communication activities (2.058 units). For the first ones, also at a national level, the specialization of the provinces of Foggia (21.6%) and Lecce (19.5%) emerges. As regards to the communication sector, the province of Bari stands out (16.9%).

Table 2 - Number of CC MSMEs in Apulia (absolute value)

SECTOR *Subsector*	**Foggia**	**Bari**	**Taranto**	**Brindisi**	**Lecce**	**Barletta-Andria-Trani**	**Total**
CREATIVE INDUSTRIES	**661**	**1.937**	**541**	**411**	**1.214**	**399**	**5.162**
Architecture	368	845	249	180	596	176	2.414
Communication and branding	229	833	226	165	437	168	2.058
Design	64	259	66	66	181	54	690
CULTURAL INDUSTRIES	**952**	**2.639**	**986**	**665**	**1.637**	**674**	**7.552**
Film, video, radio and tv	80	273	80	59	98	55	645
Software and videogames	118	570	161	78	266	89	1.282
Music	13	50	28	17	45	14	168
Books and printing	741	1.745	717	510	1.228	516	5.457
PERFORMING ARTS	**74**	**341**	**88**	**57**	**193**	**69**	**822**
HERITAGE	**13**	**17**	**5**	**7**	**19**	**7**	**66**
TOTAL CULTURAL CORE	**1.700**	**4.933**	**1.619**	**1.139**	**3.062**	**1.148**	**13.602**
						TOTAL ITALY	**289.792**
						%	**5%**

Source: Fondazione Symbola-Unioncamere, Creative in Puglia, 2019, p. 28.

Table 3 - Number of CC MSMEs in Western Greece (absolute value)

SECTOR *Subsector*	**Achaia**	**Aitolok-arnania**	**Ileia**	**Total**
CREATIVE INDUSTRIES	**640**	**0**	**0**	**640**
Architecture	40	0	0	40
Communication and branding	572	0	0	572
Design	28	0	0	28
CULTURAL INDUSTRIES	**1.563**	**640**	**275**	**2.478**
Film, video, radio and tv	136	43	26	205
Software and videogames	342	101	52	495
Music	96	41	12	149
Books and printing	989	455	185	1.629
PERFORMING ARTS	**146**	**87**	**0**	**233**
HERITAGE	**7**	**1**	**0**	**8**
TOTAL CULTURAL CORE	**2.356**	**728**	**275**	**3.359**
			TOTAL GREECE	**46.370**
			%	**7%**

Source: Chamber of Achaia

Table 3 figures the number, in absolute terms, of the cultural and creative enterprises of Western Greece, with the specification of the region of Ileia, Achaia and Aitolokarnania. In particular, it can be noted that the region of Achaia is the one that holds greater weight than the other two; in fact, 70,1% of the cultural and creative enterprises of Western Greece are located in the region of Achaia.

Aitolokarnania and Ileia hold respectively 21,7% and 8,2% of cultural and creative enterprises. Moreover, what emerges with preponderance is that in the regions of the Ileia and of the Aitolokarnania the creative enterprises are completely absent.

The cultural and creative entrepreneurial fabric of Western Greece is characterized by the presence of 3.359 companies, which represent approximately 7% of the national cultural and creative sector.

Table 4 - Legal status of CC MSMEs in Apulia (percent composition)

SECTOR *Subsector*	**Imprese individuali**	**Società di persone**	**Società di capitale**	**Cooperative**	**Consorzi e altre forme**	**Apulia**
CREATIVE INDUSTRIES	**69,1**	**4,8**	**18,5**	**2,6**	**4,9**	**100,0**
Architecture	99,0	0,3	0,6	0,1	0,0	100,0
Communication and branding	36,7	8,9	36,9	5,1	12,4	100,0
Design	61,4	8,4	26,3	3,9	0,0	100,0
CULTURAL INDUSTRIES	**60,2**	**11,2**	**24,4**	**2,6**	**1,5**	**100,0**
Film, video, radio and tv	32,7	10,5	46,4	4,5	6,0	100,0
Software and videogames	26,6	9,5	59,0	3,0	1,9	100,0
Music	52,8	13,6	29,0	2,0	2,5	100,0
Books and printing	71,6	11,7	13,6	2,3	0,9	100,0
PERFORMING ARTS	**26,8**	**8,0**	**21,5**	**11,7**	**32,0**	**100,0**
HERITAGE	**7,7**	**10,4**	**16,4**	**46,1**	**19,5**	**100,0**
TOTAL CULTURAL CORE	**61,3**	**8,6**	**22,0**	**3,4**	**4,7**	**100,0**

Source: Fondazione Symbola-Unioncamere, Creative in Puglia, 2019, p. 30

The most common legal form in Apulia is the individual enterprise. 61,3%, or 8.344 units, in the cultural core sector use this form. This is a typical aspect of the Italian entrepreneurial system, made of small and micro industries, most of them are individual industries.

However, in the last five years, there has been a strengthening in the basis. Apulian CCIs have progressively oriented towards the capital company, a more structured legal form, which has registered an annual average increase of +4,7%. On the contrary, there is a general decrease in the use of other types of legal forms. This is a relevant element, because bigger, more capitalized with easier access to credit industries lead to a sustainable cultural and creative entrepreneurial system. This trend is common to all the cultural and creative fields, and today the capital companies represent a quarter of the total (2.988 units, or 22%).

The biggest number of capital companies is in the cultural industries field. It reaches 24,4%, almost 2% more than the average of the rest of the Apulian cultural and creative sector. The software and videogames sector is the most involved in this case: here, the capital companies represent half of the entrepreneurial basis (59%).

Also, movies, videos, radio and television companies reach a relevant level of 46%. The presence of the capital companies is lower but significant for the performing arts and visual arts (21,5%) and historical and artistic heritage (10,9%). This is a recent trend (2011-2017), the annual average increase has been respectively +7,8% and 10,9%.

Table 5 - Legal status of CC MSMEs in Western Greece (percent composition)

SECTOR *Subsector*	Private Company	Limited Partnership (EE)	General Partnership (OE)	Limited Liability Company (EPE)	Private Capital Company (IKE)	SA	Association	Koinsep	Western Greece
CREATIVE INDUSTRIES	**61,6**	**5,3**	**10,8**	**6,9**	**9,5**	**5,0**	**0,5**	**0,5**	**100,0**
Architecture	52,5	5,0	25,0	7,5	7,5	2,5	0,0	0,0	100,0
Communication and branding	73,0	5,4	5,4	13,5	2,7	0,0	0,0	0,0	100,0
Design	61,5	5,3	10,1	6,4	10,1	5,5	0,5	0,5	100,0
CULTURAL INDUSTRIES	**73,6**	**3,2**	**8,6**	**3,5**	**6,6**	**4,0**	**0,4**	**0,1**	**100,0**
Film, video, radio and tv	54,2	4,5	9,6	9,6	6,8	14,1	1,1	0,0	100,0
Software and videogames	59,4	5,2	7,9	5,4	15,8	6,3	0,0	0,0	100,0
Music	74,0	1,3	8,0	6,0	7,3	3,3	0,0	0,0	100,0
Books and printing	79,8	2,6	8,7	2,1	3,8	2,3	0,5	0,2	100,0
PERFORMING ARTS	**76,1**	**3,0**	**9,0**	**1,3**	**9,8**	**0,9**	**0,0**	**0,0**	**100,0**
HERITAGE	**37,5**	**12,5**	**0,0**	**0,0**	**50,0**	**0,0**	**0,0**	**0,0**	**100,0**
TOTAL CULTURAL CORE	**71,4**	**3,6**	**9,0**	**4,0**	**7,5**	**4,0**	**0,4**	**0,2**	**100,0**

Source: Chamber of Achaia

Even for the region of Western Greece, the cultural and creative system is characterized by a significant presence of private companies.

A glance at the graphs reveals that more than two-thirds of CCI's are private company while only 9% of these are constituted as a general partnership in the same year. Whereas the minority of the cultural and creative sector use the legal status of Limited Partnership (3,6%), Limited Liability Company (7,5%), SA (4%), Association (0,4%) and Koinsep (0,2%).

Even though the fact that the situation is reversed for some sectors and sub-sectors of the Apulia region, in Western Greece the condition of the CCI's legal status remains stable for each sector and subsector. Indeed, as can be seen in the table, the percent composition of the cultural and creative sector does not change compared to the total figure.

Table 6 clearly shows comparisons between Greece and Italy about the contribution of CC MSMEs to the respective national GPD. It is explicitly observed that Italy has a stronger entrepreneurial development in the cultural and creative sector than Greece. In fact, as can be seen from the table, the number of companies operating in this sector in Italy is almost 28 times higher than in Greece. Actually, in 2017 Italian cultural and creative productive system has registered a value-added of more than 92 billion euros, and the employment of more than 1,5 million people. It is 6,0% of national employment.

In line with the other Southern Regions, Apulia shows a delay towards the rest of the country, in spite of a historical and artistic heritage that offers important opportunities, in terms of touristic economy, as it is noted on the regional development strategies[9].

[9] For any details, refer to Fondazione Symbola, We are Creative in Puglia, Rapporto sulle imprese culturali e creative in Puglia, 2019, commissioned by the partner Puglia Creativa according to the Traces project task, pp. 10-24.

Table 6 - The value added of CC MSMEs in Greece and Italy (absolute value – thousands of euro)

SECTOR *Subsector*	Greece	Italy
CREATIVE INDUSTRIES	**533,1**	**13.404,8**
Architecture	232,6	8.594,8
Design	271,2	
Communication and branding	29,3	4.810,1
CULTURAL INDUSTRIES	**1.263,85**	**33.608,5**
Film, video, radio and tv	202,7	7.466,5
Software and videogames	296,9	12.011,9
Music	208,1	320,7
Books and printing	556,2	13.809,3
PERFORMING ARTS	**198,6**	**7.932,9**
HERITAGE	**88,8**	**2.823,7**
TOTAL CULTURAL CORE	**2.084,4**	**57.769,9**

Source: Fondazione Symbola-Unioncamere, Eurostat, ELSTAT, Ministry of Culture and Sports

2,7 billion euros is the value-added of the sector that represents 4,2% of the overall richness produced at the regional level; 1,8% less than the national average. This data grows of one-tenth (4,3%) if we analyze the employment data (2.756 employees).

However, the regional data do not show the differences coming from the complexity of the territory. Bari, the main town and historical harbor on the Adriatic Sea, leads the regional results by providing to the production of half of the creative and cultural value-added. Moreover, the value-added of 1.265 million euros produced in the province of Bari are the 5.3% of the overall richness; the highest value in Apulia, so does the employment (25.063 employees, 5,3% of the employment in the province).

On the contrary, the lowest result both for richness production and for the employment belongs to the province of Foggia. 307 million euros (value-added) are barely 3,2% of the overall local richness; slightly better for the employment, to 3,5%.

In Apulia, 2,4% of the cultural and creative value-added (compared to the richness produced in the region) is given by the activities of the cultural core. Preservation and valorization of the historical and artistic heritage (the classic vision of the cultural sector), not replicable activities of cultural creation (performing arts and visual arts), the new forms of replicable cultural creation (cultural industries) and design, communication and architecture (creative industries) are the activities that belong to this sector. The rest (1,8%) is produced by creative-driven activities, those activities not directly involved in the cultural area, but subjected to "culturalization" processes.

The 28,7% of the value-added produced by the Cultural and Creative Productive System comes from the cultural industries' activities (movies, videos, radios, television; software, videogames and games; music; publishing). The publishing offers the biggest contribution to the sector, with 18% of the overall richness (405 million euros).

The province of Foggia records the best result in the activities linked to the publishing (20,1% on the overall value-added of the provincial CCPS) even if, in absolute terms, the 60% of this sector's value-added comes from the sum of the data from Bari and Lecce.

4,3% of the employment is distributed like this: 2.5% to the core cultural sector and 1.8% to the creative driven activities.

Despite the fact that there was a huge increase all over the world of employment in CCIs, in Greece the situation was dramatically different. According to Avdikos[10], in the period 2008-2013, in Greece the employment of CCIs decreased rapidly, registering a fall of about 30%. The individual industries exhibiting the greater decrease in terms of employment were those of printing (- 67%), and museums-libraries (-54%, 2008-2013). A different situation has revealed for filming and music, design and software industries; the former registered a significant decline in employment, but it also showed an increase during 2008 and 2010, on the contrary, design and software industries showed a considerable increase in employment, 62,2% and 26,9% respectively. For the first trimester of 2013, the total number of employees in these sectors reached 110.000 people and accounts for 3% of total employment in Greece[11]. In particular, the employees of architectural agencies were 23.103 while only 2.008 people were hired in film, video and music industry.

The recent update offered by the context analysis carried out within the SPARC project shows that "the number of CCI employees in 2016 was decreased by 19,31% compared to 2011 at the national level and 20,07% at the regional level". However, in 2016, at the regional level "there was an 11,18% increase of CCI employment compared to 2015, contributing to the overall increase of the region (0,63%)".

The great presence of financial incentives by the state has had an important implication for business profits, size, and growth. Like in Italy, the wealth produced in Greece by the cultural component is the result of the aggregation of various forms of production representative of the various expression of the regions due to historical conditions (path-dependency), earning benefits of the economies of localization. In this contest during 2014[12], the Region of Attica produced 75.5% of the GVA of the CCIs in Greece, with 57.3% of creative enterprises, which employ 60.8% of employees on the total, especially Athens covered most of the cultural and creative value-added of the Attica region[13]. The concentration of the Attica region was more intensive compared to the other European region. In fact, in the Attica region were located around 30.000 businesses active in the cultural and creative sector. Secondly, we had to the Region of Attica comes the Region of Central Macedonia with 10.1% of GVA, 12.2% of employees and 13.5% of enterprises. The remaining 11 Regions share 14.3% of the GVA, 27% of employees, and 29.1% of enterprises.

In 2016, the "CCI's GVA at the national level is estimated at 1,82 billion Euros, following an average annual reduction of 7,50% (2011-2016). In the Region of Western Greece, the added value followed the same course as the national one. Despite a small increase in 2014, a significant loss took place over the next two years. In 2016, the Greek recession decreased the region's added value of CCI's by 35,82% (34,1 million Euros)" (SPARC, 2019).

C.2 Regional specialization in the Cultural and Creative Sector

This section offers the results we obtained applying Florence's index calculation and representation. To this end, the project area was studied according to the territorial areas described in the following table.

Table 7 – The project area

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[10] Avdikos V., *The Cultural and Creative Industries in Greece*, Epikendro Publications, Athens, 2014.

[11] CSVM – Boldrini F., Bracchini M.R., Fanti S., *State of the Art and Mapping of Competences Report*, 2015.

[12] *Mapping the cultural and creative industries in Greece*, Report 2015.

[13] "Employment in the CCIs in Athens in 2010 declined by 19% compared to 2008, while the corresponding decline in the rest of Greece was 9%. The economic crisis deprived Athens of approximately 17,000 jobs in its first two years (2009-2010), while it appears that the crisis's impact on the CCIs was much greater in Athens than the rest of Greece". In *Mapping the Competences of the Cultural and Creative Sectors*, Boldrini F., Bracchini M.R., Fanti S., ArtS – Skills for the Creative Economy, 2014.

Legend

Apulia	
1	GARGANO
2	MONTI DAUNI
3	TAVOLIERE
4	PUGLIA IMPERIALE
5	CITTA' METROPOLITANA
6	ALTA MURGIA
7	MURGIA DEI TRULLI
8	MAGNA GRECIA
9	GRAVINE TARANTINE
10	BRINDISI
11	LECCE
12	ARCO IONICO
13	SERRE SALENTINE

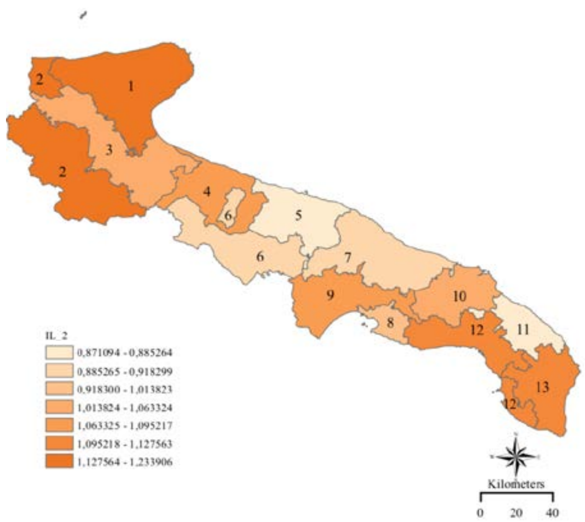
Legend

Western Greece	
258	Aigialeia
263	Erymanthos
265	Kalavryta
269	Patras
273	West Achaea
257	Agrinio
259	Aktio Vonitsa
260	Amfiloxia
266	Mesollogi
267	Nafpaktia
272	Thermo
274	Xeromero
261	Andravida-Kyllini
264	Ilida
268	Ancient Olympia
270	Pineios
271	Pyrgos
275	Zacharo

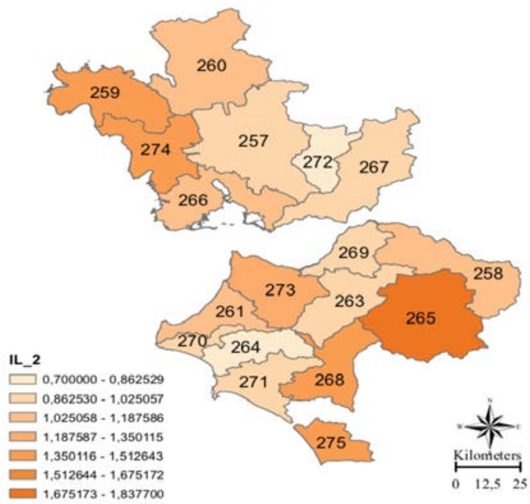
The results are shown per economic subsector, according to the sector perimeter described in table 1 and comments are provided concerning the main economic activities, which characterize each subsector in Apulia and Western Greece.

Fig. 1 - Cultural Industries: Books and printing

Apulia



Western Greece



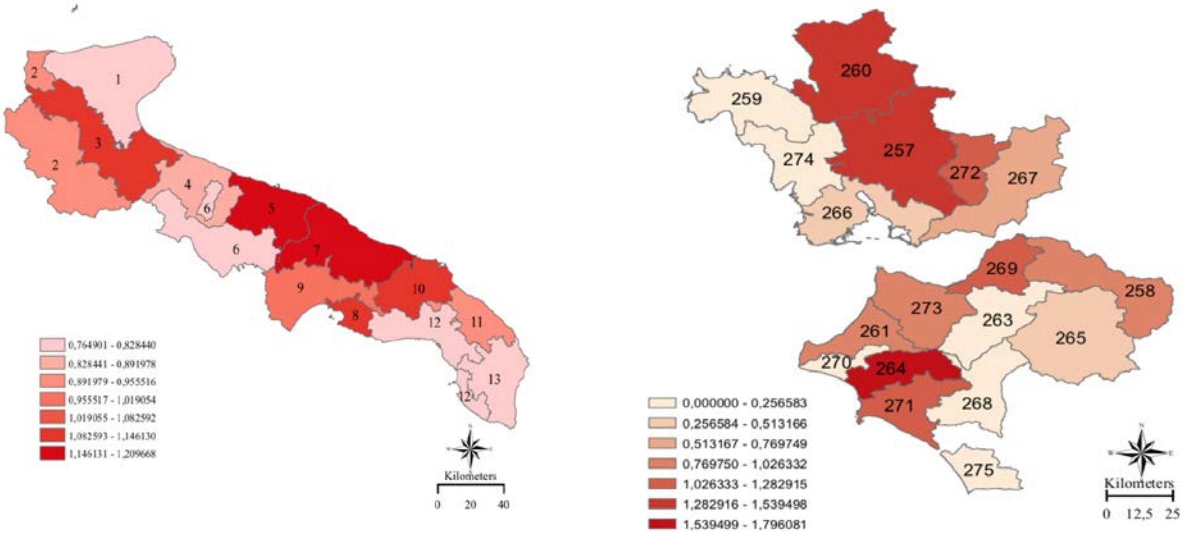
The maps in figure 1 highlight the concentration of the *Books and printing* subsector. As can be seen, for the Apulia region, the sub-sector is predominant in the extreme north of the region and the extreme south, mainly for the territorial areas of Gargano and Monti Dauni, Arco Ionico and Serre Salentine.

The Apulia areas, which have a lower concentration of companies operating in this subsector, are the Metropolitan City of Bari and the Lecce area. Also for Western Greece, the situation is similar to that of the Apulia Region. In fact, the areas in which the sub-sector companies are mainly present are located from north to south, with particular reference to the area of Kalavryta, Anti-Olympia, and Zacharo. Follow the northernmost areas of Aktio Vonitsa and Xeromero.

The territorial concentration changed considerably for the Apulia Region in relation to the sub-sector of *Film, video radio and TV* (Fig. 2). The areas that see the greatest presence of companies operating in this subsector are the central Adriatic ones. In particular, the area of the Metropolitan City of Bari and the area of Murgia dei Trulli identify the two parts in which these activities converge. These areas are followed, in terms of high levels of entrepreneurial concentration, by the Tavoliere and Magna Grecia areas.

Fig. 2 - Cultural Industries: Film, video, radio and Tv

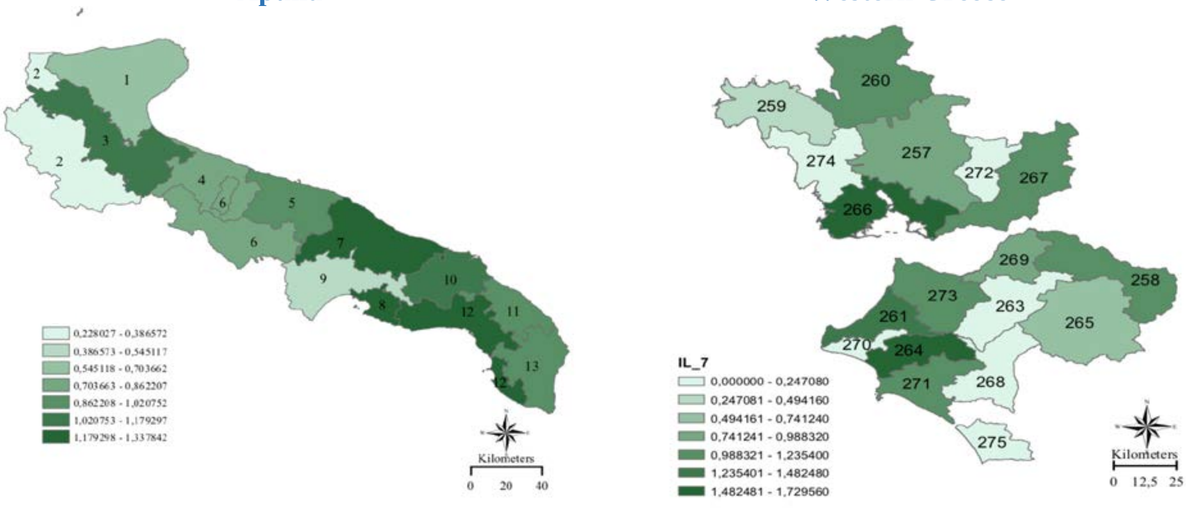
Apulia **Western Greece**



The map of Greece, on the other hand, shows a strong disparity between the Western Greek divisions. The areas that have the greatest convergence of companies operating in the sector are Amfiloxia, Agrinio, and Ilida. On the contrary, there are many areas that have a low density of companies in the film, video, radio and TV sub-sector, such as Aktio Vonitsa and Xeromero, Erymanthos, Ancient Olympia, and Zacharo.

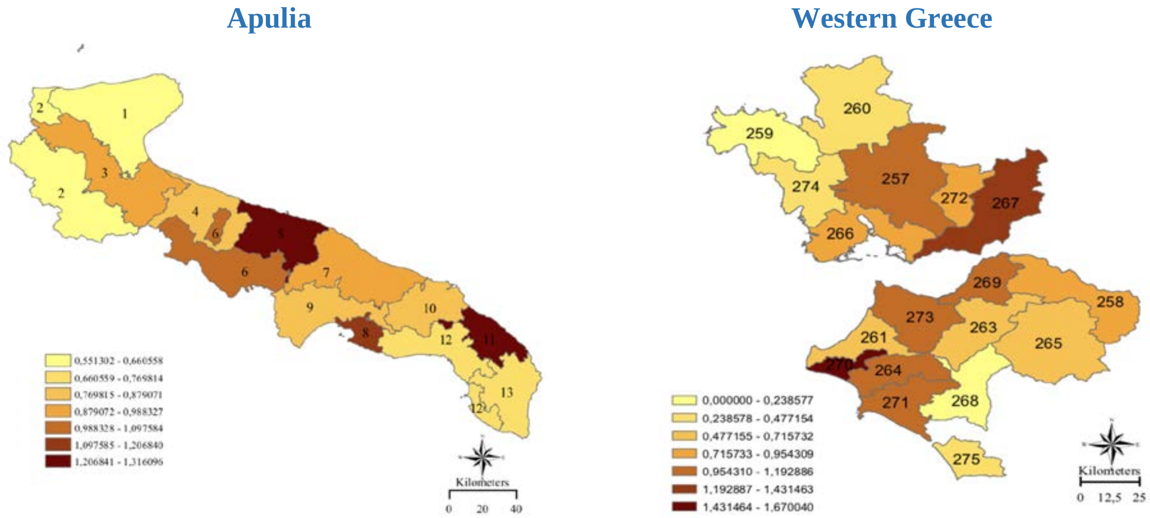
Fig. 3 - Cultural Industries: Music

Apulia **Western Greece**



The *Music* sub-sector is characterized by a strong concentration, in the Apulia Region, in the areas of Tavoliere, Murgia dei Trulli, Magna Grecia, and Arco Ionico. The particularity of this sub-sector is noted for greater homogeneity in terms of convergence of cultural activities compared to the regional average. Likewise, even for Western Greece, there is a greater concentration of music companies. The richest areas are Mesollogi, Ilida, and Andravyda-Kyllini.

Fig. 4 - Cultural Industries: Video Games and Software



The *Video Games and Software* sub-sector, in Apulia, has a strong concentration in the area of the Metropolitan City of Bari and in the area of Lecce. Magna Grecia and Alta Murgia follow these two areas.

The regions of Western Greece in which converge the majority of companies operating in the software and videogames sector are Pineios and Nafpaktia.

Table 8 - Regional economic specialization in the Cultural Industries sector

Area	Books and printings	Film, video, radio and tv	Music	Videogames and Software
Apulia	- Binding and related services - Translation and interpretation activities - Publishing of newspaper	- Motion picture, video and television programme distribution activities - Motion picture projection activities - Radio broadcasting	- Manufacture of consumer electronics - Reproduction of recorded media	- Web portals - Other software publishing
Western Greece	- Retail sale of newspapers and stationery in specialised stores - Binding and related services	- Motion picture projection activities - Television programming and broadcasting activities	- Manufacture of musical instruments - Retail sale of sporting equipment in specialised stores	- Computer programming activities - Publishing of computer games

As for the economic specialization in the Cultural Industries sector, table 8 shows what are the economic activities which characterize in each sub-sector the cultural and creative production in the project area. From that table, it can be noted that different territorial specializations of the Apulia Region and Western Greece are different within the various subsectors of the culture sector. In particular, the figure shows that, for the Books and printing subsector, the common economic activity in both territories is Binding and related services.

In contrast, however the specializations of the sub-sector Film, video, and radio and TV, in which there is no economic activity mostly developed in both regions, as well as for the sub-sector of videogames and software.

The territorial specialization of the Apulia Region as regards the *Communication and branding* subsector reveals a homogeneous composition. Despite that, the most specialized areas are the metropolitan city of Bari, Alta Murgia, Murgia dei Trulli, and Lecce.The situation is the same for the region of Western Greece the territorial specialization, although steady low, is homogeneous throughout the region except for the territorial areas of Patras, Aigialeia, Erymanthos, and West Achaea.

Fig. 5 - Creative Industries: Communication and branding

Apulia **Western Greece**

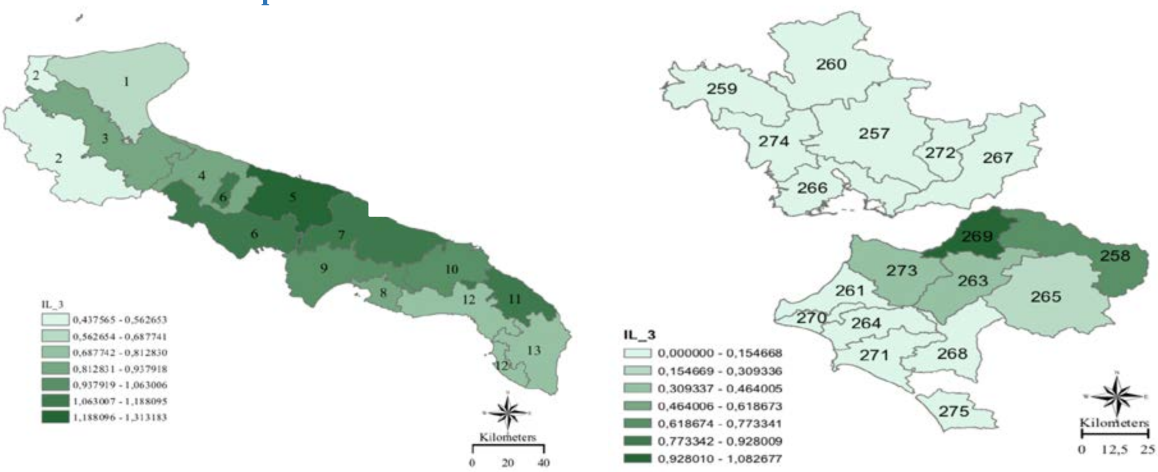
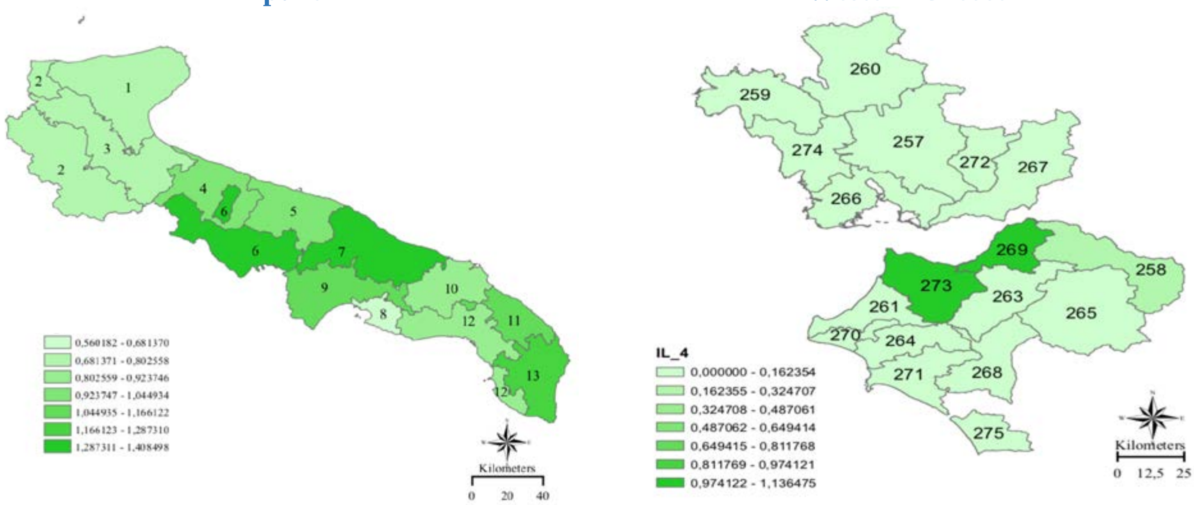


Fig. 6 - Creative Industries: Design

Apulia **Western Greece**

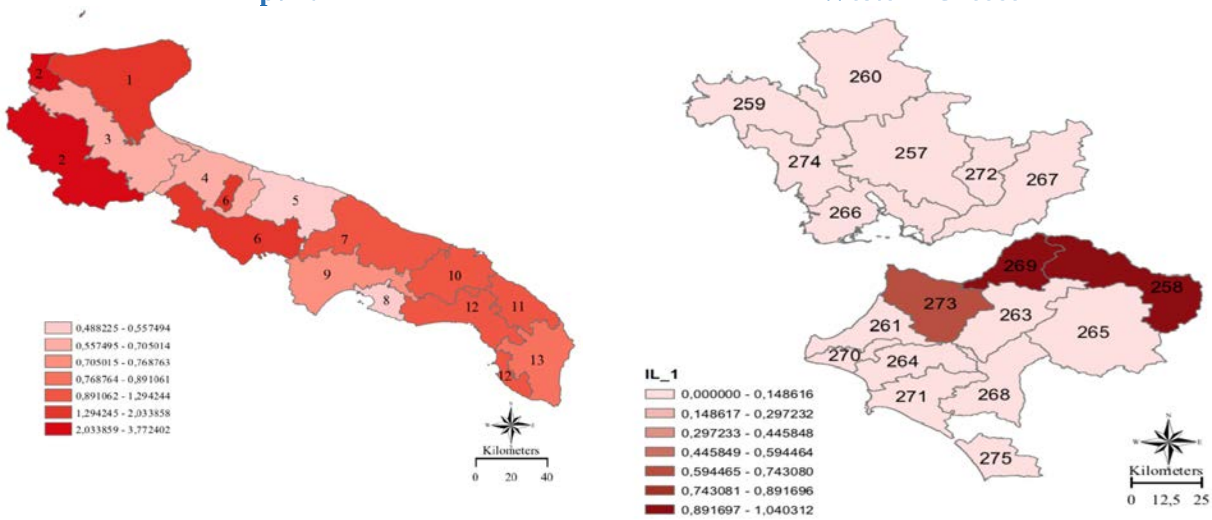


The Apulian areas that are particularly rich in companies operating in the *Design* sector are Alta Murgia, Murgia dei Trulli, Serre Salentine, Lecce and Gravine Tarantine.

The sub-sector design does not appear to be particularly developed in Western Greece, with the exception of the areas of West Achaea and Aktio Vonitsa.

Fig. 7 - Creative Industries: Architecture

Apulia — Western Greece



The *Architecture* sub-sector of the creative industries is particularly active in the north of the Apulia Region; in particular, the areas where it is most developed are Monti Dauni, Gargano and Alta Murgia areas. As far as Western Greece is concerned, the greatest territorial development is evident in the regions of the Aigialeia, Patras and West Achaea.

As for the economic specialization in the Creative Industries sector, table 9 shows what are the economic activities, which characterize in each sub-sector the cultural and creative production in the project area.

Table 9 - Regional economic specialization in the Creative Industries sectors

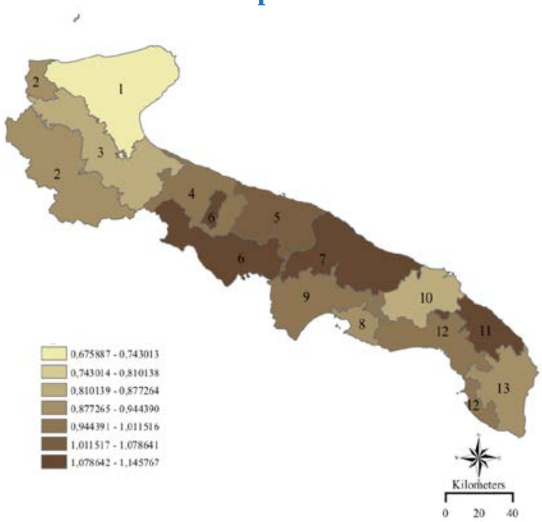
Area	Architecture	Design	Communication and branding
Apulia	- Architectural activities	- Specialised design activities	- Public relations and communication activities - Media representation
Western Greece	- Architectural activities	- Specialised design activities	- Advertising agencies - Public relations and communication activities

For both subsectors of architecture and design, there are no further specific details explaining the typology of activities in both regions. For the communication and branding sub-sector, the common economic activity in both regions is public relations and communication activities, while media representation is the second most important economic activity in Apulia the same for advertising agencies in Western Greece.

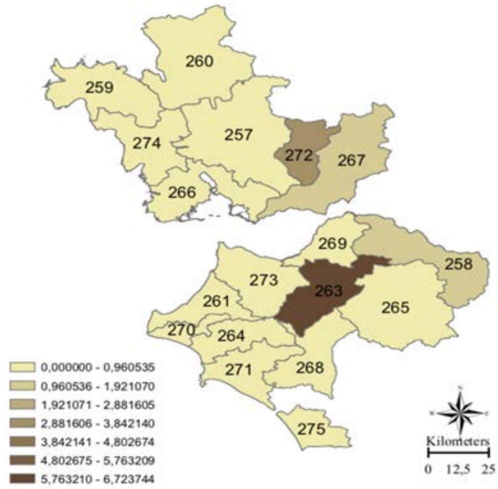
In the field of *Performing arts*, the greatest territorial development can be found in central Apulia, which is in the areas of the Murgia dei Trulli, Alta Murgia, Metropolitan City of Bari and Lecce. In Western Greece, companies operating in the performing arts converge in the Erymanthos area.

Fig. 8 - Performing Arts: Performing arts, recreation activities, conventions and trade shows

Apulia



Western Greece



As for the economic specialization in the Performing Arts sector, table 10 shows what are the economic activities, which characterize in each sub-sector the cultural and creative production in the project area.

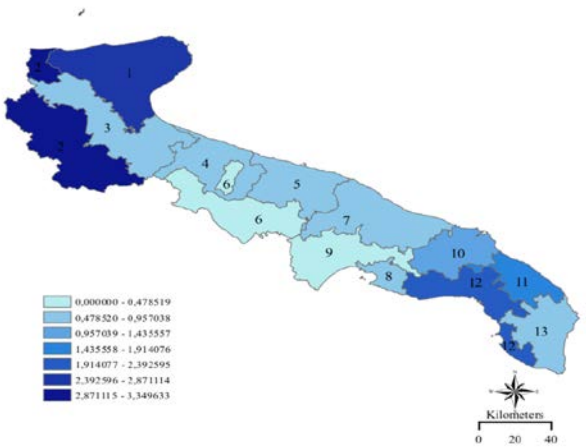
Table 10 - Regional economic specialization in the Performing Arts sectors

Area	Performing arts, recreation activities, conventions and trade shows
Apulia	- Performing arts - Operation of arts facilities
Western Greece	- Cultural education - Operation of arts facilities

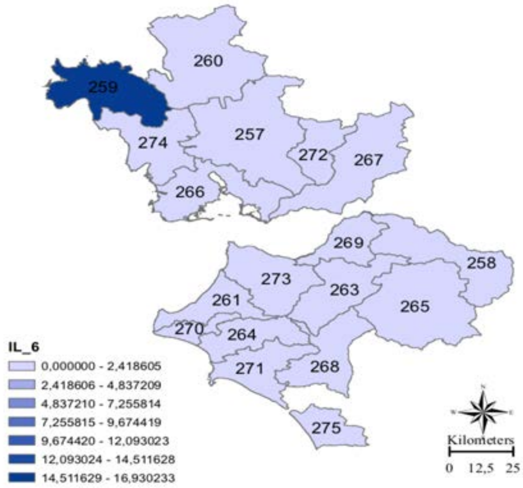
For the performing arts sector, the most developed activity that is common in both regions is the operation of arts facilities; while for Apulia the economic activity of the performing arts obtained a high level of territorial specialization, as well as cultural education for Western Greece.

Fig. 9 – Heritage: Museums, Libraries and archives, Operation of historical sites and buildings and similar visitor attractions

Apulia



Western Greece



The subsector of the *Museums, Libraries, and archives*, as shown by the map, is highly specialized in the northern part of the Apulia Region, in particular for the Monti Dauni and Gargano areas; Arco Ionico and Lecce follow them. For the region of Western Greece, territorial specialization is homogeneous, except for the Aktio Vonitsa area, where the concentration of companies operating in the sector is very high.

As for the economic specialization in the *Heritage* sector, table 11 shows what are the economic activities which characterize in each sub-sector the cultural and creative production in the project area. Library and archives activities are the most developed economic activity in both regions surveyed regarding the Heritage sector. Next to the library and archivers activities, there is the economic activity of historical sites and buildings and similar visitor attractions for the Apulia region.

Table 11 - Regional economic specialization in the Heritage Arts sectors

Area	Museums, Libraries and archives, Operation of historical sites and buildings and similar visitor attractions
Apulia	- Library and archives activities - Operation of historical sites and buildings and similar visitor attractions
Western Greece	- Library and archives activities

C.3 Cross-border specialization in the Cultural and Creative Sector

Table 12 shows the cross-border activities between Apulia and Western Greece, highlighting the common economic specializations in the project area.

Starting from the sector of Cultural Industries for Books and printing subsector, the most developed business activities in both regions are *Binding and related services* and *Translation and interpretation activities*. For Film, radio and tv sub-sector, on the other hand, the cross-border economic activities in Apulia and in Western Greece are *Motion picture projection activities*, *Radio broadcasting and Television programming and broadcasting activities*. No activity turns out to be cross-border for the subsector of Music; while for Videogames and software the most developed business activities in the territories under investigation are *Web portals* and *Publishing of computer games*. The Creative Industries sector, instead, shows a greater specialization for the *Advertising and Public relations and Communication activities* for the *Communication and branding sub-sector* and *Specialized design activities* and *Architectural activities*, respectively, for Design and Architecture sub-sectors. Cross-border business activities for the sector of Performing arts are *Cultural education* and *Operation of arts facilities*; while *Library and archives activities* for the Heritage sector.

Table 12 – Cross-border specialization in the Cultural and Creative Sectors

Sector	Subsector	Business Activity
Cultural Industries	Books and printing	- Binding and related services - Translation and interpretation activities
	Film, video, radio and tv	- Motion picture projection activities - Radio broadcasting - Television programming and broadcasting activities
	Music	None
	Videogames and software	- Web portals - Publishing of computer games
Creative Industries	Communication and branding	- Advertising agencies - Public relations and communication activities
	Design	- Specialised design activities
	Architecture	- Architectural activities
Performing arts	Performing arts, recreation activities, conventions and trade shows	- Cultural education - Operation of arts facilities
Heritage	Museums, Libraries and archives, Operation of historical sites and buildings and similar visitor attractions	- Library and archives activities

Section D - CC MSMEs' features, challenges and development needs in a cross-border overview

In order to analyse the topic in an accurate way, this brief literature review aims at identifying the specific features of the sector under investigation according to specialized literature available to date. In particular, the analysis highlights first the characteristics and features of the cultural and creative enterprises sector, emphasizing what makes them atypical to the rest of the Production System. Secondly, the analysis focused on the attributes and requirements held by the cultural entrepreneur and then, in conclusion, the study elaborates a comment on what is the potential of this sector for economic growth and for the development of the territories.

Once the CCIs have been defined, the studies have dealt with describing the characters inherent to the cultural and creative industries. A recent European study[14] found the main features of the entrepreneurial dimension of cultural and creative enterprises, which we can be summarized as follow:

1. CCIs sectors generally see few large companies, which however make a share important sector turnover and control an important part of its resources;
2. CCIs sectors are dominated by micro-enterprises that are extremely flexible to survive;
3. Unconventional forms of employment such as short-term contracts, frequent job changes, more than one work at the same time;
4. There are many independent professionals, who often accept compensation under the average;
5. CCIs frequently aggregate, outsource and manage multiple projects with other companies to seize market opportunities;
6. The focus is on the creation and development of products, rather than on distribution;
7. CCIs follow different processes to acquire skills and training, often without any certification. This leads to non-trivial difficulties even for employers;
8. Many ICC professionals also work in other sectors of the economy;
9. Poor visibility and the particular nature of innovation processes in the CCS: only 3% derives from research and development activities.

To conclude, the cultural and creative businesses have some particular characteristics: first, it stands out that the creative activities employ young people (**Youth**) and women (**Woman job**), contributing to increase youth employment and to favor the participation of women in employment[15]. Cultural and creative industries also hire more educated workers (**High level of education[16]**) consequently this quality has a great impact to improve productivity (**High productivity**) and, in some sectors, CCIs jobs contribute more to GDP than the economy-wide average. In this sense, CCIs contribute to the growth and to create a plenty of jobs and internationalization,

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[14] HKU, The Entrepreneurial Dimension of the Cultural and Creative Industries, Utrecht, Hogeschool vor de Kunsten Utrecht, 2010.

[15] "Statistics compiled by the UK Government showed that women accounted for more than 50% of people employed in the music industry in 2014 (vs. 47% only in the whole active population)". In *Cultural times – The first global map of cultural and creative industries*. EY report – December 2015.

[16] "The workforce of the CCIs is characterised by a high level of education (including a higher share of academics), and by a high level of flexibility as well as mobility. The cultural and creative sectors are an important employer for young people: in 2013, almost one fifth of persons employed were between 15 and 29 years old – the highest share of all sectors. Another characteristic of the industry is the high percentage of self-employee persons, "One-Person-Enterprises" (OPEs) and freelancers." In Austria Institute for SME Research and VVA Europe, *Boosting the competitiveness of cultural and creative industries for growth and jobs*, 2016.

creative industries are widely recognized as a highly dynamic part of many economies which seems to be more resilient to economic recessions relevant to other sectors[17]. Furthermore, there are other two important features: **independence** and **entrepreneurship** because small businesses or individuals drive creation[18].

When we speak about the characteristic of the CCIs we have to focus the attention on the various type of business models. According to Pratt and Greffe[19], a business model is something defines all the features of cultural or creative industry. A business model in the CCSs is understood as a set of assumptions about how an individual entrepreneur or an organization create value, deliver value to a customer, capture the value and turn it into economic, social or cultural output[20]. However, the results of the study conducted by the EENC[21] showed that there is more than a single business model that can be adopted by the cultural or creative industries.

The business model named **Crowdfunding/Crowdsourcing** is usually adopted by industries operated in the sector of Cinema, Music, Museums and Heritage. Its feature is related to the type of investment: several sponsors voluntarily decide to participate in the creation or implementation of a business idea.

The **Innovation labs, creative hubs, co-working spaces** is another type of business model in which the business started from an idea that born in a test center where people experiment and implement ideas and creativity. This BM is applied frequently in businesses that operate in Music, Design/Fashion, Games/Software, Development, and Architecture.

The **Streaming** BM is useful for businesses that work in a technological and high definition audio and video, like Music, Performing arts and Cinema. They record their performance and then, with the use of a platform, stream their products.

The **Self-Publishing and Printing on demand** BM, as the words themselves can reveal, is utilized in the Publishing sector, Music sector and Fine arts and it concerns printing when the demand required it.

Anotherbusiness model, try to stimulate participation in cultural and creative activities (Print media/Publishing, Fine arts, Museums/Cultural, Heritage sector, Performing arts and Music) with the use of the game. This is the BM of **Gamification**.

In the end, the **P2P Peer to Peer Models**, applied in Print, Media/Publishing and Cultural sector with educational entities/tasks, such as museums, archives, libraries, it has its roots in technology and P2P networks in which computers are directly linked to each other and no server support is needed.

One of the characteristics of CCIs is the great presence of many small and micro-enterprises. Despite the fact that, in absolute number and in proportional ones, they have a great role in terms of value-added and employment, the wealth produced is generated by little businesses. In addition, one more characteristic is the innovation inside products or services due to the high content of knowledge; most of the employees in the sector is a second level master and for that reason, there is a large incidence of high academic preparation. Training, however, is predominantly artistic or linked to training courses linked to communication. The creative need for managerial, legal and commercial knowledge, together with fundraising skills and "market access" strategies.

The need for a skilled manager is not the only feature of the cultural sector, actually in CCIs the figures of manager and entrepreneur overlap. If, in a classical definition, "entrepreneur" is who establishes and runs a

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[17] *Creative economy*. Report 2008. Geneve-New York: UNDP, UNCTAD.
[18] *Cultural times – The first global map of cultural and creative industries*. EY report – December 2015.
[19] Borisova V., *Essential Characteristics and Market of the Creative Industries' Product*, in Economic Alternatives, Issue 1, 2018.
[20] *New Business Models in the Cultural and Creative Sectors* (CCSs), EENC, 2015.
[21] *New Business Models in the Cultural and Creative Sectors* (CCSs), EENC, 2015.

business, which earns part of the profit derived from the value of the products it creates, such as the artist who owns a small business, in the cultural sector, we have to add to this definition the high skill of education. In this framework, it is important to underline what means with *managerial skills*; they are those abilities that can be acquired throughout studies, like leadership skills, problem-solving, decision-making, planning, delegation, communication, and time management. Through the integration of these skills with the innate sense of risk and all the characteristics of entrepreneurship[22], we can identify the characteristics of the entrepreneur and the manager in the same figure. Therefore, cultural entrepreneurs are those who generate and apply their creativity for purposes commercial and prefer to work in total autonomy and independence, also as freelancers. They are generally very motivated, they have a strong ethical sense and accept that their work is judged based on performance, always in competition with their competitors. Although they prefer to work independently, they recognize the importance of collaborative work, and, based on these characteristics, they appreciate co-working. In addition, they are part of a larger creative community that can provide ideas, contacts, complementary skills and easier access to the market. The approach to culture is transversal, mediated by the construction of a service or product that finds useful applications in the cultural world. The fundamental characteristic of this type of entrepreneur is inevitably linked to strong propensities for innovation. The creative entrepreneur carries out his work with passion and believes in what he does, following his intuitions; he understands where the market is going and is brave enough to be able to stand out from the crowd[23].

According to Entrepreneurial Dimension of the Cultural and Creative Industries[24], there are several *determinants of entrepreneurship* that could support entrepreneurs during their work. In addition, due to these, there is a chance to control the background of the enterprise. The Entrepreneurship Indicator Project[25] recognized six themes that describe the determinants of entrepreneurial performance: **Capital and Access to Finance**, **Technology and Research & Development**, **Market Conditions**, **Entrepreneurial capabilities**, **Regulatory framework** and **Culture**.

Based on this study and according to what could influence cultural and creative industries[26], the main thematic outcomes chosen to formulate the survey are:

1. **Access to finance**: Financial markets play an important role in the efficiency and growth of the economy and access to finance is a priority. The access of small and medium-sized enterprises (SMEs) to finance is essential to foster growth and innovation;
2. **Access to market**: Usually one of the most important problems concerning the knowledge factor is due above all to the difficulty in finding information about market opportunities. Access to the market allows the increase of competition between companies and thus permits the sector to benefit from this;
3. **IPR instruments:** Intellectual Property Rights (IPR) by protecting the intangible assets of companies permits to profit from their creative and innovative activities. The importance of intangible assets is growing. In a world where companies compete more on innovation, creativity and quality, IPR identify a strategic tool for CCIs;

[22] Subject to successes and failures, driven by complex desires, having an intelligence and imagination out of the ordinary, being highly independent, driven by the will to break the rules and conventions, driving force behind the innovation process, they are visionaries and have the ability to predict and act on the future.
[23] Leadbeater C., Oakley K., (2005), *Why Cultural Entrepreneurs Matter*, in Hartley J., *Creative Industries*, Blackwell Publishing, Oxford, 2005.
[24] The Entrepreneurial Dimension of the Cultural and Creative Industries, Utrecht School of the Arts, 2010.
[25] OECD/EUROSTAT, *Measuring Entrepreneurship. A digest of indicators*, Geneva/Paris: Eurostat/OECD, 2008.
[26] The Entrepreneurial Dimension of the Cultural and Creative Industries, Utrecht School of the Arts, 2010.

4. **Entrepreneurship education, skills and training**: Despite the fact that the programs about education and entrepreneurship are growing, there is a global awareness of them and their impact. The lack of entrepreneurial skills is reality, but they are necessary for a sector in which is indispensable to find these features;
5. **Access to innovation**: In the development and commercialization of radical innovations, SMEs face a series of difficulties, inherent their size and organization, superior to those of medium-large companies. Innovation underlies a natural component of risk, which is the characteristic of any business activity. To make quality innovation are required high-level skills;
6. **Collaboration**: In an extremely complex economic system like today, the competitive advantage of the company no longer depends exclusively on the portfolio of the goods produced or on product-process combinations, but on innovation and collaboration. It is no longer the chance to generate independently innovation and to maintain it inside the business unit, so companies need to collaborate with other companies, usually belonging to the production chain (or even external to it).

Based on these informative outcomes, a questionnaire was prepared including 8 different informative sections for a total of 78 questions and it was administered to the companies that participated in the focus groups (Appendix 1). It follows the description of the statistics obtained for each informative section.

D.1 Qualitative analysis of CCIs' features and challenges in Apulia

This section discusses the descriptive statistics of a sample of 80 industries working in the cultural and creative sectors in the Apulia region, Italy. The survey included enterprises from cultural industries: film, video, radio and tv; videogames and software; music; books and printings. In addition, networks from creative industries and performing arts& heritage industries also have been covered.

D.1.1 General information about the CCIs in the sample

Table 13 shows the main characteristics of the enterprises participating in our qualitative survey. Regarding the legal structure, data reveals that 31,25% of the sample were individual companies followed by shareholding companies with 26.25%. The percentages of associations and human partnerships were relatively close with 17,50% and 15% respectively. The cooperative society networks had a low proportion with 8.75%, while the lowest percentage was consortium with only 1.25%. The average of enterprises' age was 10.95 years, with ages ranging from 7.15 years for creative industries and 19.94 years for music enterprises. Those results reflect the novelty of the creative sector compared with the cultural one. The number of permanent employees within 96.25% of enterprises was under 10 employees. While the average of temporary employees was 1.56 for every enterprise.

Table 13 – General information about the CCIs in the sample

Question		Multiple choises	Cultural Industries				Creative Industries	Performing Arts & Heritage	Totals
			Film, video, radio and tv	Videogames and software	Music	Books and printing			
1.	Legal structure of the company	Consorzio	0,00	0,00	0,00	0,00	7,69	0,00	1,25
		Società cooperativa	9,09	7,69	0,00	8,33	0,00	18,75	8,75
		Società di capitale	45,45	38,46	66,67	16,67	38,46	0,00	26,25
		Impresa individuale	27,27	30,77	33,33	45,83	38,46	6,25	31,25
		Associazione	9,09	0,00	0,00	0,00	7,69	75,00	17,50
		Società di persone	9,09	23,08	0,00	29,17	7,69	0,00	15,00
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
2.	Average Enterprise Age		11,53	9,11	19,94	13,18	7,15	10,09	10,95
3.	Number of permanent employees	0-9 employees	90,91	100,00	100,00	95,83	100,00	93,75	96,25
		10-49 empoyess	9,09	0,00	0,00	4,17	0,00	6,25	3,75
		50 - 249 employees	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		250 - more	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
4.	Average Number of temporary employees		1,82	2,38	2,33	1,54	0,31	1,63	1,56

As for the Apulia Region, data confirmed the main findings highlighted in the report of the Symbola Foundation about the companies' size. In fact, the cultural core industries with less than 3 employees are 90,2% of the overall cultural and creative entrepreneurial basis in Puglia. It is a big result – 10% more than the regional economy's average (80,2%). The micro industries are particularly spread in the creative industries sector, architecture (99,1%) and design (93,6%). On the contrary, industries with more than 10 employees are concentrated in the sectors linked to management and valorization of the artistic historical heritage. Here, 7,5% of the industries have between 10 and 20 employees and 2,5% more than 20.

D.1.2 Access to finance

Concerning the financial and economic planning adopted by organizations, more than half of respondents (57,5%) reported that their enterprises do not make any forecast related to budget or business plan. Whereas 27,5% of firms conduct one-year forecasting and 13,75% of them makes up to three years forecasting. Otherwise, only 1,25% of the industries make up to five years forecasting, which reflects the lack of such strategic planning in the study sample. The results pointed out that the use of professional consultancy in plans disclosure was very poor, this claim comes from the high percentage of self-elaborated undertaken by enterprises' representatives themselves (85,29%).

Table 14 shows the detailed responses of the surveyed sample.

About the financial support, 52% of the sample have obtained financial support since their business has started, 45,24% of this support has done by the public, 14,29% by private and 40,48% by both public and private. Whereas 47,5% of enterprises did not obtain any financial support.

The organizations have used different types of guarantees. More than half of them (57,50%) used personal guarantees. While guarantees linked to future profitability and real state guarantees had used by 11,25% and 7,5% of firms respectively.

By asking the respondents about the probability of risk capital that might occur on their investment, 40% of them see that the probability is less than 10%, followed by 32.5% for risk probability from 10% to 30% and 17,50% for risk probability from 31% to 50%.

The most obstacles that have faced the organization to access finance were: time-consuming procedures for public incentives with 29,45%, difficulty in getting grants with 28,77%, and risk aversion from the financial institution with 17,81%.

About respondents' overview in the most adequate tools to increase financial opportunities, the study pointed out the most important sources which were: public grants with 42,86%, tax incentive with 23,47%, self-financing with 12,76%, and VAT reduction for the CC products with 9,18%.

Table 14 – Access to finance

No.	Question	Multiple choises	Cultural Industries: Film, video, radio and tv	Cultural Industries: Videogames and software	Cultural Industries: Music	Cultural Industries: Books and printing	Creative Industries	Performing Arts & Heritage	Totals
1.	Does Your organisation make any financial and economic planning (budget and updated business plan)?Mark only one oval)	Yes: up to 5 years forecast	0,00	0,00	0,00	0,00	0,00	6,25	1,25
		Yes: up to 3 years forecast	18,18	15,38	0,00	12,50	15,38	12,50	13,75
		Yes: 1 year forecast	36,36	23,08	0,00	12,50	38,46	43,75	27,50
		No	45,45	61,54	100,00	75,00	46,15	37,50	57,50
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
1.1	If yes how do you elaborate the forecast?	By yourself	83,33	100,00	0,00	0,00	71,43	100,00	85,29
		Using professional consultancy	16,67		0,00	66,67	28,57	0,00	8,82
		Other	0,00		0,00	33,33	0,00	0,00	5,88
2.	Have you obtained a financial support since Your business has started?	Yes	63,64	30,77	66,67	58,33	38,46	62,50	52,50
		No	36,36	69,23	33,33	41,67	61,54	0,00	47,50
		N.A	0,00	0,00	0,00	0,00	0,00	37,50	0,00
2.1	If yes what type of funding did you receive?	Public	57,14	25,00	50,00	64,29	40,00	20,00	45,24
		Private	14,29	25,00	0,00	21,43	20,00	0,00	14,29
		Both, public and private	28,57	50,00	50,00	14,29	40,00	80,00	40,48
2.1.1	If you recevied public funding how would you rate the delivery times of the loan obtained	Too long	33,33	0,00	0,00	9,09	25,00	60,00	27,78
		Well timed	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		In the norm	0,00	66,67	100,00	36,36	25,00	10,00	27,78
		Short	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Long	66,67	33,33	0,00	54,55	50,00	30,00	44,44
2.1.2	On average, what was the percentage of Your income coming from public contribution in the last financial year?	< 10%	50,00	66,67	100,00	63,64	75,00	0,00	47,22
		10% - 30%	0,00	0,00	0,00	18,18	25,00	40,00	19,44
		31% - 50%	16,67	33,33	0,00	0,00	0,00	40,00	16,67
		51% - 70%	0,00	0,00	0,00	9,09	0,00	0,00	2,78
		71% - 90%	33,33	0,00	0,00	0,00	0,00	10,00	8,33
		>90%	0,00	0,00	0,00	9,09	0,00	10,00	5,56
2.2	At what stage of the entrepreneurial lifecycle do you receive that financial support?	Start-up	71,43	25,00	0,00	42,86	40,00	20,00	38,10
		Build-up	14,29	25,00	50,00	28,57	60,00	50,00	35,71
		Build-out	0,00	50,00	50,00	14,29	0,00	30,00	7,14
		Connecting	14,29	0,00	0,00	14,29	0,00	0,00	19,05
2.3	Did the financial support improve Your business with an increase in revenues?	Yes	85,71	75,00	50,00	64,29	80,00	90,00	76,19
		I don't know	0,00	25,00	0,00	28,57	20,00	10,00	16,67
		No	14,29	0,00	50,00	7,14	0,00	0,00	7,14
3.	What type of warranty do you usually use?	Personal guarantees	45,45	61,54	0,00	70,83	69,23	43,75	57,50
		Real estate guarantees	18,18	15,38	0,00	8,33	0,00	0,00	7,50
		None	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Guarantee funds	9,09	0,00	0,00	0,00	0,00	6,25	2,50
		Discussion of the business plan (guarantees linked to the future profitability of a project)	0,00	15,38	33,33	4,17	0,00	31,25	11,25
		Deposits	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Combination	9,09	7,69	33,33	8,33	15,38	6,25	10,00
		Other	18,18	0,00	33,33	8,33	15,38	12,50	11,25
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
4.	On average, what is the percentage of risk capital on Your total investment?	< 10%	27,27	61,54	0,00	20,83	76,92	37,50	40,00
		10% - 30%	45,45	30,77	33,33	45,83	15,38	18,75	32,50
		31% - 50%	9,09	7,69	33,33	25,00	7,69	25,00	17,50
		51% - 70%	9,09	0,00	33,33	4,17	0,00	6,25	5,00
		71% - 90%	0,00	0,00	0,00	0,00	0,00	6,25	1,25
		> 90%	9,09	0,00	0,00	4,17	0,00	6,25	3,75
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
5.	What are the main obstacles for Your organisation to access finance?	Risk aversion from financial institution	44,44	13,04	50,00	17,78	13,04	6,06	17,81
		High interest rate	0,00	0,00	0,00	8,89	0,00	0,00	2,74
		Time consuming procedures for public incentives	22,22	13,04	25,00	35,56	47,83	24,24	29,45
		No bank loan guarantees	5,56	4,35	0,00	2,22	4,35	9,09	4,79
		Public fund shortage	0,00	0,00	0,00	8,89	4,35	3,03	4,11
		Absence of requirements for obtaining funding	5,56	4,35	0,00	0,00	4,35	3,03	2,74
		Time spent before approval of financial support	5,56	13,04	25,00	2,22	0,00	3,03	4,79
		Difficulty in getting grants	5,56	52,17	0,00	22,22	13,04	48,48	28,77
		Other	11,11	0,00	0,00	2,22	13,04	3,03	4,79
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
6.	What do you think is the most adequate tool to increase financial opportunities for Your company?	Public grants	45,45	38,89	66,67	28,81	33,33	63,04	42,86
		Self-financing	13,64	8,33	0,00	23,73	8,33	6,52	12,76
		Seed financing	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Tax incentive	18,18	16,67	33,33	38,98	16,67	13,04	23,47
		Risk capital	4,55	0,00	0,00	0,00	0,00	0,00	0,51
		VAT Reduction for the CC products	4,55	5,56	0,00	6,78	12,50	17,39	9,18
		Donation/Sponsoring	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Micro Credit fund	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Private grants	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Innovation vouchers	0,00	0,00	0,00	0,00	4,17	0,00	0,51
		Bank loan	13,64	30,56	0,00	1,69	8,33	0,00	8,67
		Other	0,00	0,00	0,00	0,00	16,67	0,00	2,04
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00

D.1.3 Access to market

The lack of finance comes in the first stage as the most obvious business-related challenge when starting the business with 58,39%, then the limited knowledge of how to run a business with 18,79%, high market competition with 8,72%, and high tax burdens with 6,71%.

Regarding the most relevant managerial factors that support the organization's growth, the research reported that 40,65% of the sample highlighted the strategic vision, which considers a high percentage compared with 19,63% for leadership skills, 14,49% for communication skills, and 11,21% for marketing skills.

Using Likert scale from (1) most relevant to (5) least relevant to determine the most relevant cost factors which obstruct the organization growth, we calculated the percentages of both 'most relevant' and 'relevant' answers for every factor, the results showed that cost of labor (37,5%), scarce access to finance outside the firm (31,25%), and cost of knowledge (30%), are highlighted by the employees with approximate percentages.

More than half of the sample (51,55%) have identified price competition as the most important entry barrier for the organization at the national level. While, the presence of strong brands also identified by 12,42%, and both access to knowledge and exclusive agreement with key distributors had 9,94 %. The cost of production also highlighted by 7,45%.

Concerning the role of companies in exploring, identifying, and selecting new opportunities and markets, only 2,50% of respondents see that their companies have a systematic and integrated process for harness opportunities. While, 22,5% of them see that they have the ability to identify new opportunities but the mechanism of their collection and selection is not defined, and 26,25% of them see that they have the ability to identify new opportunities and they have defined mechanisms of their collection and selection. More than third (38,75%) disclosed that opportunities and new markets are identified on an occasional basis, and 43,75% see that their companies do not have limited knowledge about market opportunities.

Less than half (42,5%) know that their companies would take new internationalization initiatives in the future, whereas a third of them (32,50 %) don't know any information about future initiatives of their companies. The most four reasons that prevent companies from foreign markets are the nature of the product with 25%, management and control difficulties with 13,75%, explicit company choice with 11,25%, and of lack of assistance from public agencies in charge with 10%.

For the development of ICT/new technologies by the company, the study found out that 40% of respondents see that the company follows limited use of IT resources. The role of the ICT system in supporting internal processes of the business come before supporting the external one with 23,75% and 8.75% respectively. While both the internal and external role of a ICT system is important (17,50%).

The government encourages and provide appropriate support to enable CCI SMEs to better access opportunities in three mean forms: support in incubators with 32,03%, seed finance with 28,10%, and gaining a market position with 11,76%. less than 10% for every public procurement, lead market initiatives, and standardization.

Table 15 – Access to market

	Question	Multiple choises		Cultural Industries: Film, video, radio and tv	Cultural Industries: Videogames and software	Cultural Industries: Music	Cultural Industries: Books and printing	Creative Industries	Performing Arts & Heritage	Totals
1.	Which were the most important business-related challenge when starting Your company?	Lack of finance		44,44	75,00	0,00	45,83	68,18	75,00	58,39
		Limited knowledge of how to run a business		22,22	8,33	40,00	27,08	13,64	12,50	18,79
		High competition in the market		11,11	4,17	0,00	12,50	0,00	12,50	8,72
		Lack of knowledge about the market		0,00	0,00	20,00	0,00	0,00	0,00	0,67
		High tax burdens		0,00	4,17	40,00	8,33	13,64	0,00	6,71
		Lack of social security tailored to the needs of CCIs		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Cost of intellectual property rights		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Other		5,56	0,00	0,00	0,00	4,55	0,00	1,34
		N. A.		16,67	8,33	0,00	6,25	0,00	0,00	5,37
2.	What are the most relevant managerial factors that support the growth of Your organization?	Leadership skills		19,23	12,90	0,00	19,35	31,58	18,75	19,63
		Strategic vision		57,69	58,06	0,00	29,03	55,26	31,25	40,65
		Marketing skills		11,54	19,35	0,00	19,35	0,00	6,25	11,21
		Communication skills		0,00	0,00	33,33	17,74	13,16	25,00	14,49
		Problem solving skills		0,00	3,23	33,33	8,06	0,00	6,25	5,61
		Good business plans		0,00	0,00	0,00	0,00	0,00	6,25	1,40
		Administrative/financial skills		0,00	0,00	0,00	0,00	0,00	6,25	1,40
		Management skills		0,00	0,00	33,33	1,61	0,00	0,00	1,87
		Ability to track investors		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Ability to access external business advices/support		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Creative thinking		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Other		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N. A.		11,54	6,45	0,00	4,84	0,00	0,00	3,74
3.	What is the most relevant cost factors, which obstruct Your organization's growth? Please rank them 1 (most relevant) to 5 (least relevant)	Cost of labour	1	36,36	38,46	0,00	29,17	30,77	6,25	26,25
			2	0,00	0,00	33,33	20,83	7,69	12,50	11,25
			3	9,09	15,38	33,33	8,33	30,77	37,50	20,00
			4	0,00	7,69	0,00	8,33	23,08	25,00	12,50
			5	27,27	23,08	33,33	20,83	7,69	18,75	20,00
			N.A	27,27	15,38	0,00	12,50	0,00	0,00	10,00
		Cost of knowledge	1	9,09	7,69	66,67	16,67	0,00	6,25	11,25
			2	9,09	15,38	0,00	25,00	30,77	12,50	18,75
			3	9,09	30,77	33,33	16,67	61,54	50,00	32,50
			4	18,18	15,38	0,00	12,50	7,69	18,75	13,75
			5	27,27	15,38	0,00	16,67	0,00	12,50	13,75
			N.A	27,27	15,38	0,00	12,50	0,00	0,00	10,00
		Scarce access to finance outside the firm	1	18,18	15,38	0,00	8,33	30,77	25,00	17,50
			2	9,09	7,69	0,00	25,00	7,69	12,50	13,75
			3	9,09	30,77	66,67	12,50	38,46	12,50	21,25
			4	18,18	15,38	0,00	25,00	15,38	25,00	20,00
			5	18,18	15,38	33,33	16,67	7,69	25,00	17,50
			N.A	27,27	15,38	0,00	12,50	0,00	0,00	10,00
4.	What is the most important entry barriers for Your organization at the national level?	Price competition		33,33	57,69	62,50	60,87	53,85	41,18	51,55
		Access to knowledge		9,52	0,00	0,00	6,52	7,69	26,47	9,94
		Exclusive agreement with key distributors		23,81	19,23	0,00	4,35	7,69	5,88	9,94
		Presence of strong brands		14,29	3,85	37,50	6,52	26,92	8,82	12,42
		Cost of production		4,76	7,69	0,00	10,87	0,00	11,76	7,45
		Lack of business mechanism		0,00	0,00	0,00	0,00	3,85	0,00	0,62
		Lack of entrepreneurial skills		0,00	0,00	0,00	2,17	0,00	2,94	1,24
		Other		0,00	3,85	0,00	2,17	0,00	2,94	1,86
		N.A		14,29	7,69	0,00	6,52	0,00	0,00	4,97
5.	Does the company explore, identify, and select new opportunities and markets?	Opportunities and new markets are identified on an occasional basis		27,27	46,15	0,00	37,50	53,85	37,50	38,75
		We have the ability to identify new opportunities but a mechanism for their collection and selection is not defined.		18,18	7,69	66,67	16,67	30,77	31,25	22,50
		We have the ability to identify new opportunities and we have defined mechanisms for their collection and selection		27,27	23,08	33,33	33,33	7,69	31,25	26,25
		We have a systematic and integrated process for harness opportunities; we anticipate market expectations by assuming leadership positions		0,00	7,69	0,00	0,00	7,69	0,00	2,50
		N.A.		27,27	15,38	0,00	12,50	0,00	0,00	10,00

6.	Do you think that Your organization have a limited knowledge about market opportunities?	Yes	27,27	38,46	33,33	37,50	61,54	68,75	46,25
		No	45,45	46,15	66,67	50,00	38,46	31,25	43,75
		N.A	27,27	15,38	0,00	12,50	0,00	0,00	10,00
6.1	If yes, what do you think is the best way to reduce this gap?	Organisational improvement	33,33	0,00	0,00	44,44	25,00	36,36	29,73
		Knowledge marketplace	0,00	40,00	0,00	11,11	25,00	36,36	24,32
		Peer assist	33,33	20,00	0,00	0,00	0,00	9,09	8,11
		Technology upgrade	33,33	20,00	0,00	33,33	12,50	18,18	21,62
		Public support	0,00	20,00	0,00	11,11	37,50	0,00	13,51
		Other	0,00	0,00	100,00	0,00	0,00	0,00	2,70
7.	Does the company would take new internationalization initiatives in the future?	Yes	45,45	38,46	100,00	37,50	23,08	56,25	42,50
		No	0,00	15,38	0,00	20,83	30,77	6,25	15,00
		Don't know	27,27	30,77	0,00	29,17	46,15	37,50	32,50
		N.A.	27,27	15,38	0,00	12,50	0,00	0,00	10,00
8.	If the company is not present on foreign markets, indicate the reason:	Nature of the product	9,09	7,69	33,33	25,00	38,46	37,50	25,00
		Explicit company choice	18,18	30,77	0,00	4,17	7,69	6,25	11,25
		Difficulties in cultural or linguist approach	9,09	7,69	0,00	8,33	7,69	12,50	8,75
		Difficulty in identifying management on the spot	9,09	7,69	33,33	0,00	0,00	18,75	7,50
		Management and control difficulties	9,09	7,69	0,00	29,17	0,00	12,50	13,75
		No assistance from public agencies in charge	18,18	7,69	33,33	4,17	15,38	6,25	10,00
		Scarcity of infrastructures, difficulties in local connections	0,00	0,00	0,00	4,17	15,38	0,00	3,75
		Administrative/bureaucratic impediments	0,00	0,00	0,00	4,17	0,00	0,00	1,25
		Regulatory impediments	0,00	7,69	0,00	0,00	0,00	0,00	1,25
		Financial impediments	0,00	7,69	0,00	8,33	15,38	6,25	7,50
		Lack of protection of trademarks	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N.A.	27,27	15,38	0,00	12,50	0,00	0,00	10,00
9.	Does the company develop the ICT/New Technologies?	The company makes limited use of IT resources	9,09	15,38	0,00	45,83	53,85	68,75	40,00
		The ICT business systems support the management of various internal processes with an adequate level of integration	18,18	15,38	66,67	16,67	38,46	25,00	23,75
		The ICT business systems support the management of various external processes with an adequate level of integration	9,09	15,38	0,00	16,67	0,00	0,00	8,75
		The ICT business systems support in an integrated manner all processes and decisions, strategic and operational, both internally and externally in relation to customers, suppliers and partners	36,36	38,46	33,33	8,33	7,69	6,25	17,50
		N.A.	27,27	15,38	0,00	12,50	0,00	0,00	10,00
10.	Could government encourage and provide appropriate support to enable CCI SMEs to better access opportunities on the market?	Support in incubators	63,16	26,92	14,29	28,89	26,92	30,00	32,03
		Seed finance	10,53	34,62	0,00	28,89	34,62	33,33	28,10
		Gaining a market position	0,00	11,54	85,71	8,89	11,54	6,67	11,76
		Public procurement (used to increasing the demand for specific innovative products and services)	0,00	15,38	0,00	15,56	0,00	10,00	9,15
		Lead Market Initiative (set to identify the new needs and new market for innovative products or services)	0,00	0,00	0,00	4,44	11,54	10,00	5,23
		Standardisation (setting up a playing field for innovators, accompanying the emergence of new markets and facilitating the spread of technology)	5,26	3,85	0,00	0,00	11,54	0,00	3,27
		Access to knowledge	5,26	0,00	0,00	4,44	3,85	0,00	2,61
		Other	0,00	0,00	0,00	2,22	0,00	0,00	2,61
		N.A.	15,79	7,69	0,00	6,67	0,00	10,00	5,23

D.1.4 Intellectual Property Rights (IPR)

As for the awareness to Intellectual Property Rights (IPR), the study pointed out (see table 17) that 18,75% of the sample couldn't evaluate the effectiveness of national IPR legislation and policies, and 33,75% of them see it less effective. While 73,75% recognize that it is quite or more important for the business to understand how to protect its IPR.

Furthermore, half of the respondents approved that their companies haven't any IPR rights, whereas only 20% of them see that their companies have rights of IPR. The only repeated rights are trademarks with 50%, copyrights with 29,17%, and patents with 20,38%. The protected works involved: musical works with 27,27%, photographic works with 18,18%, then each of literary works, broadcasting works, and other activities with the same proportion (13,64%).

It was remarkable that 62,50% of the participants haven't ever received advice related to IPR, only 20% received such advice. Strategically, the participant highlighted the need for four factors as regard to IP with close percentages to some extent namely: laws and services in order to curb the illegitimate reuse of somebody else's work, improving knowledge, technologies to regulate and protect content with technological protection measures, and allowing greater accessibility in order to be able to share and freely access existing content as a mean of unlocking the potential benefits that this can offer.

D.1.5 Entrepreneurship, skills and training

Using Likert scale from (1) most relevant to (5) least relevant to determine the most relevant entrepreneurial skills for organizations, we calculated the percentages of both 'most relevant' and 'relevant' answers for eight factors, the results showed the next ranking: problem-solving skills (51,25%), administrative/financial skills (46,25%), creative thinking (46,25%), networking skills (42,50%), communication skills (41,25%), leadership skills (40%), marketing skills (37,50%), readiness to take risk (32,50%), and international export vision (32,5%).

Concerning the most relevant sources of education and training in the organization, the results indicated that universities/educational institutions come in the first stage with 42,02%, followed by consultancy services with 14,29%, private no-profit organizations with 12,61%, and public research institutes with 10,08%. While the specialized public/semi-public innovation support comes in the last rank with 5,88%.

The same Likert scale and the same methodology of calculating mentioned above also have been used to rank the most relevant factors in supporting the organization. The results showed widely close percentages for each use of technology (48,75%), financial access (43,75%), and training opportunities (42,50). The same proportion (37,5%) has been reported for each use of design as a business strategy, support in providing R&D, and facilitating the exchange of knowledge within the CCIs between experienced and inexperienced CCIs. Then 35% for business advice and 33,75% for networking opportunities.

The participants showed that they gained their entrepreneurship skills from three main sources, namely: informal personal networks with 44,12%, graduation and postgraduate education in entrepreneurial and business skills with 25%, and finally internship and on-site learning experiences or learning by doing with 10,29%. Otherwise, 76,25% of respondents said that the development of advice and support centers specifically for the creative and cultural industries is quite or much needed.

Table 17 shows the detailed responses of the surveyed enterprises in the cultural and creative sector.

Table 16 – Intellectual Property Rights (IPR)

No.	Question	Multiple choises	Cultural Industries: Film, video, radio and tv	Cultural Industries: Videogames and software	Cultural Industries: Music	Cultural Industries: Books and printing	Creative Industries	Performing Arts & Heritage	Totals
1.	How do you evaluate the effectiveness of national IPR (Intellectual Property Rights) legislation and policies?	Ineffective	18,18	15,38	0,00	4,17	15,38	12,50	11,25
		Less effective	27,27	15,38	0,00	45,83	53,85	25,00	33,75
		Not ineffective or effective	0,00	15,38	33,33	8,33	15,38	12,50	12,50
		Quite effective	18,18	0,00	66,67	4,17	0,00	6,25	7,50
		Much effective	0,00	0,00	0,00	0,00	0,00	6,25	1,25
		I don't know	9,09	15,38	0,00	25,00	15,38	31,25	18,75
		N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
2.	In Your view, how much important is that businesses understand how to protect their IP e.g. patents, trademarks, designs and copyright?	Not important	0,00	0,00	0,00	0,00	0,00	6,25	1,25
		Less important	0,00	0,00	0,00	8,33	7,69	0,00	3,75
		Not unimportant or important	0,00	0,00	0,00	4,17	7,69	0,00	2,50
		Quite important	18,18	15,38	0,00	37,50	30,77	56,25	32,50
		Much important	54,55	46,15	100,00	37,50	46,15	18,75	41,25
		I don't know	0,00	0,00	0,00	0,00	7,69	12,50	3,75
		N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
3.	Has Your company any of intellectual property rights?	Yes	27,27	7,69	100,00	20,83	15,38	12,50	20,00
		No	27,27	38,46	0,00	50,00	61,54	75,00	50,00
		Rather not answer	18,18	15,38	0,00	12,50	15,38	6,25	11,25
		I don't have any intellectual property	0,00	0,00	0,00	4,17	7,69	6,25	3,75
		I'm not aware of what an intellectual property is	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N.A	27,27	38,46	0,00	12,50	0,00	0,00	15,00
3.1	If yes, what rights it benefits from	Patents	40,00	0,00	0,00	37,50	100,00	0,00	20,83
		Trade marks	60,00	0,00	80,00	25,00	0,00	50,00	50,00
		Designs	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Copyright	0,00	100,00	20,00	37,50	0,00	50,00	29,17
		Confidentiality agreements	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Open Access Licensing (e.g.: Creative Common)	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		You don't own any IP	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		You don't know what IP is	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Prefer not to say	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
3.2	If yes, what are the protected works?	Literary works	0,00	0,00	0,00	42,86	0,00	0,00	13,64
		Musical works	33,33	0,00	100,00	0,00	0,00	0,00	27,27
		Broadcasting rights	50,00	0,00	0,00	0,00	0,00	0,00	13,64
		Artwork	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Maps and technical drawings	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Photographic works	0,00	0,00	0,00	57,14	0,00	0,00	18,18
		Cinematographic works	0,00	0,00	0,00	0,00	0,00	50,00	4,55
		Computer Software	16,67	100,00	0,00	0,00	0,00	0,00	9,09
		Other	0,00	0,00	0,00	0,00	100,00	50,00	13,64
4.	Have you ever received advice on intellectual property rights?	Yes	27,27	23,08	66,67	12,50	15,38	18,75	20,00
		No	45,45	38,46	33,33	70,83	76,92	75,00	62,50
		I don't know	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		N.A	0,00	0,00	0,00	4,17	7,69	0,00	2,50
5.	Strategically, as regards intellectual property (IP) do you highlight the need for:	Laws and services in order to curb the illegitimate reuse of somebody else's work	27,27	15,38	33,33	29,17	15,38	25,00	23,75
		Technologies to regulate and protect content with technological protection measures such as digital rights management (DRMs)	18,18	15,38	33,33	20,83	7,69	0,00	13,75
		Allowing greater accessibility in order to be able to share and freely access existing content as a means of unlocking the potential benefits that this can offer	0,00	7,69	0,00	16,67	15,38	12,50	11,25
		Improving knowledge	18,18	15,38	33,33	16,67	30,77	12,50	18,75
		No need	9,09	7,69	0,00	4,17	30,77	43,75	17,50
		N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00

Table 17 – Entrepreneurship, skills and training

	Question	Multiple choises		Cultural Industries: Film, video, radio and tv	Cultural Industries: Videogames and software	Cultural Industries: Music	Cultural Industries: Books and printing	Creative Industries	Performing Arts & Heritage	Totals
1.	What are the most relevant entrepreneurial skills for Your organization? Please rank them from 1 (most relevant) to 5 (least relevant)	Leadership skills	1	27,27	15,38	33,33	29,17	15,38	31,25	25,00
			2	18,18	15,38	0,00	8,33	15,38	25,00	15,00
			3	18,18	7,69	0,00	29,17	46,15	6,25	21,25
			4	0,00	15,38	66,67	4,17	23,08	18,75	13,75
			5	9,09	7,69	0,00	16,67	0,00	12,50	10,00
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Communication skills	1	36,36	30,77	33,33	37,50	15,38	31,25	31,25
			2	0,00	7,69	0,00	8,33	15,38	18,75	10,00
			3	18,18	15,38	33,33	8,33	0,00	12,50	11,25
			4	18,18	0,00	0,00	8,33	38,46	18,75	15,00
			5	0,00	7,69	33,33	25,00	30,77	12,50	17,50
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Problem solving skills	1	36,36	23,08	0,00	16,67	15,38	18,75	28,75
			2	9,09	7,69	66,67	25,00	30,77	25,00	22,50
			3	18,18	7,69	0,00	29,17	23,08	31,25	6,25
			4	9,09	15,38	33,33	8,33	30,77	12,50	7,50
			5	0,00	7,69	0,00	8,33	0,00	6,25	20,00
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Networking skills	1	36,36	23,08	0,00	16,67	15,38	18,75	20,00
			2	9,09	7,69	66,67	25,00	30,77	25,00	22,50
			3	18,18	7,69	0,00	29,17	23,08	31,25	22,50
			4	9,09	15,38	33,33	8,33	30,77	12,50	15,00
			5	0,00	7,69	0,00	8,33	0,00	6,25	5,00
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Administrative/Financial skills	1	36,36	15,38	0,00	16,67	7,69	18,75	17,50
			2	18,18	15,38	33,33	33,33	46,15	25,00	28,75
			3	9,09	15,38	33,33	16,67	7,69	25,00	16,25
			4	9,09	7,69	33,33	8,33	30,77	12,50	13,75
			5	0,00	7,69	0,00	12,50	7,69	12,50	8,75
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Readiness to take risk	1	0,00	23,08	0,00	4,17	7,69	18,75	10,00
			2	27,27	0,00	0,00	20,83	46,15	25,00	22,50
			3	36,36	30,77	66,67	33,33	23,08	25,00	31,25
			4	9,09	7,69	0,00	4,17	7,69	12,50	7,50
			5	0,00	0,00	33,33	25,00	15,38	12,50	13,75
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Marketing skills	1	9,09	7,69	33,33	16,67	15,38	6,25	12,50
			2	18,18	23,08	0,00	20,83	30,77	37,50	25,00
			3	36,36	7,69	66,67	25,00	0,00	37,50	21,25
			4	9,09	15,38	0,00	8,33	38,46	6,25	16,25
			5	0,00	7,69	0,00	16,67	15,38	6,25	10,00
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Creative thinking	1	36,36	15,38	66,67	33,33	30,77	50,00	35,00
			2	9,09	23,08	0,00	12,50	7,69	6,25	11,25
			3	0,00	7,69	0,00	16,67	0,00	12,50	8,75
			4	27,27	0,00	33,33	4,17	30,77	6,25	12,50
			5	0,00	15,38	0,00	20,83	30,77	18,75	17,50
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		International export vision	1	0,00	30,77	33,33	4,17	30,77	25,00	17,50
			2	18,18	0,00	0,00	8,33	23,08	31,25	15,00
			3	27,27	7,69	0,00	20,83	7,69	6,25	13,75
			4	27,27	0,00	66,67	25,00	30,77	12,50	21,25
			5	0,00	23,08	0,00	29,17	7,69	18,75	17,50
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
2.	What are the most relevant sources of education and training for Your Organization?	Universities/Educational Institutions		35,29	35,71	0,00	58,33	15,79	53,57	42,02
		Public research Institutes		11,76	0,00	60,00	5,56	26,32	14,29	10,08
		Private no-profit institutions		17,65	0,00	0,00	8,33	21,05	17,86	12,61
		Specialised Public/semi-public innovation support		0,00	0,00	0,00	2,78	10,53	0,00	5,88
		Consultancy Services		17,65	21,43	20,00	8,33	26,32	7,14	14,29
		Other		0,00	7,14	20,00	8,33	0,00	3,57	5,04
		N.A.		17,65	35,71	0,00	8,33	0,00	3,57	10,08

3.	From the following factors, please rank in order of importance the most relevant factors in supporting Your organization. Please rank them from 1 (most relevant) to 5 (least relevant)	Use of technology	1	36,36	38,46	66,67	41,67	30,77	12,50	33,75
			2	9,09	7,69	0,00	16,67	15,38	25,00	15,00
			3	0,00	0,00	0,00	8,33	7,69	31,25	10,00
			4	18,18	0,00	0,00	4,17	7,69	12,50	7,50
			5	9,09	15,38	33,33	16,67	38,46	12,50	18,75
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Use of design as a business strategy	1	9,09	7,69	0,00	16,67	15,38	18,75	13,75
			2	18,18	15,38	66,67	12,50	46,15	25,00	23,75
			3	27,27	15,38	33,33	33,33	0,00	37,50	25,00
			4	18,18	7,69	0,00	0,00	7,69	6,25	6,25
			5	0,00	15,38	0,00	25,00	30,77	6,25	16,25
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Support in providing R&D	1	9,09	15,38	0,00	16,67	7,69	31,25	16,25
			2	27,27	23,08	0,00	20,83	30,77	12,50	21,25
			3	27,27	0,00	33,33	25,00	38,46	37,50	26,25
			4	9,09	7,69	66,67	8,33	7,69	6,25	10,00
			5	0,00	15,38	0,00	16,67	15,38	6,25	11,25
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Networking opportunities	1	18,18	7,69	33,33	12,50	0,00	6,25	11,25
			2	18,18	15,38	0,00	20,83	30,77	31,25	22,50
			3	0,00	15,38	66,67	20,83	30,77	37,50	22,50
			4	27,27	7,69	0,00	20,83	15,38	12,50	16,25
			5	9,09	15,38	0,00	12,50	23,08	6,25	12,50
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Business advices	1	0,00	23,08	0,00	20,83	7,69	6,25	12,50
			2	36,36	23,08	0,00	12,50	23,08	31,25	22,50
			3	9,09	7,69	33,33	20,83	23,08	25,00	18,75
			4	18,18	0,00	66,67	16,67	23,08	18,75	17,50
			5	9,09	7,69	0,00	16,67	23,08	12,50	13,75
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Facilitating the exchange of knowledge within the CCIs between experienced and inexperienced CCIs	1	0,00	15,38	0,00	16,67	15,38	6,25	11,25
			2	27,27	30,77	33,33	16,67	23,08	37,50	26,25
			3	9,09	0,00	33,33	29,17	15,38	25,00	18,75
			4	27,27	7,69	33,33	8,33	38,46	18,75	18,75
			5	9,09	7,69	0,00	16,67	7,69	6,25	10,00
			N.A	27,27	38,46	0,00	12,50	0,00	6,25	15,00
		Financial access	1	18,18	30,77	0	33,33	23,08	25	26,25
			2	18,18	15,38	0	16,67	23,08	18,75	17,5
			3	0	0	33,33	20,83	7,69	31,25	15
			4	9,09	7,69	33,33	4,17	7,69	6,25	7,5
			5	27,27	7,69	33,33	12,5	38,46	12,5	18,75
			N.A	27,27	38,46	0	12,5	0	6,25	15
		Training opportunities	1	18,18	38,46	0	25	23,08	18,75	23,75
			2	27,27	15,38	33,33	12,5	23,08	18,75	18,75
			3	0	0	33,33	20,83	15,38	25	15
			4	0	0	33,33	12,5	15,38	25	12,5
			5	27,27	7,69	0	16,67	23,08	6,25	15
			N.A	27,27	38,46	0	12,5	0	6,25	15
4.	How do/did you gain entrepreneurship skills?	Graduation and post graduate education in entrepreneurial and business skills		17,65	23,53	33,33	27,91	8,70	36,67	25,00
		Informal personal networks		41,18	23,53	66,67	39,53	65,22	43,33	44,12
		Internships and on-site learning experiences or learning by doing		5,88	0,00	0,00	16,28	21,74	3,33	10,29
		Lifelong learning initiatives and training courses		0,00	0,00	0,00	2,33	0,00	6,67	2,21
		Advanced training in business management		11,76	11,76	0,00	0,00	4,35	0,00	3,68
		Private business courses		0,00	0,00	0,00	6,98	0,00	0,00	2,21
		Vocational training in design methods in service and product development		0,00	0,00	0,00	0,00	0,00	3,33	0,74
		Basic training in project co-ordination, team-building and peer to peer networking		0,00	5,88	0,00	0,00	0,00	0,00	0,74
		Basic training in financial and business modelling		5,88	0,00	0,00	0,00	0,00	0,00	0,74
		Centres that support SMEs and entrepreneurship		0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Other		0,00	5,88	0,00	0,00	0,00	3,33	1,47
		N.A.		17,65	29,41	0,00	6,98	0,00	3,33	8,82
5.	Do you see a need for the development of advice and support centres specifically for the creative and cultural industries?	Not needed		0	7,69	0	0	0	0	1,25
		Less needed		9,09	0	0	8,33	0	0	3,75
		Not needed or needed		0	0	0	8,33	7,69	0	3,75
		Quite needed		27,27	30,77	66,67	41,67	46,15	37,5	38,75
		Much needed		36,36	23,08	33,33	29,17	46,15	56,25	37,50
		No opinion		0	0	0	0	0	0	0,00
		N.A.		27,27	38,46	0	12,5	0	6,25	15,00

D.1.6 Access to innovation

By asking the participants about the most popular digital services in their business, 44,38% of them choose e-banking and 38,13% revealed to e-commerce. All the other digital services have been used with a quite low percentage. The most relevant sources of knowledge were individual knowledge sharing with 65,13% followed by open information sources with 15,90%.

For innovation research, the companies adopted markedly both technological innovation and creativity and soft innovation types at an equal rate of 35%. While, the activities of acquisition of machinery, equipment, software& buildings (37,11%), in-house R&D (29,90%), acquisition of existing knowledge from other enterprises (17,53%), and training for innovative activities (10,31%) have been engaged by enterprises under investigation.

While innovation, the organizations aimed to gain efficiency in the production of service and match user's demands with close percentages of 40,30% and 38,81% ordinarily. The innovating for social improvements came at the third level with 19,40%. In general, 65,67% of respondents see that their companies had innovative goods or services, 63,64% of them have been developed in cooperation with other enterprises.

About the role of CCIs in creativity and innovation, the participants highlighted such role in strengthening the links between academia, knowledge institutions (30%), to make use of rapid communication (26,25%), and both strengthen the links between CCIs and business in other sectors and making use of digital governance with 12,50%.

We asked the participants five questions covering the dimensions of encouraging innovation that should be adopted by the company, the results showed that all responses were under 25%, which reveals to the lack of efforts that made by companies to support the innovation

Table 18 offers a detailed overview of the collected responses.

D.1.7 Co-operation

From table 20, 58% of participants recognized that the networks can serve as a source of innovation through the exchange of good practices, and 20,71% of them argued that it helps in taking the advantages of mutually shared resources. Otherwise, 53,75% see that their companies co-operate or plan to co-operate with an enterprise working in the same sector, and 26,25% with companies working in different sectors. The enterprises have had 57,81% formal cooperation agreements and 42,19% non-formal agreements.

The kind of difficulties in the design and operational process of the networks were: financial resources with 25%, followed by finding organizations willing to join the network of companies with 18,75%, relations between potential participants in the network of companies with 14,06%, and identification of strategic objectives with 9,38%. By contrast, 21,88% said that there were no difficulties.

The study reported that 72,50% of the respondents consider the presence on the social network is fundamental because it increases the visibility of brand (78,90%) and it has a direct dialogue with users (9,17%). Otherwise, 26,25% didn't contact any academic institution during the last five years. While 31,25% of them contacted three or fewer academic establishments and 27,50% contacted more than three.

Table 18 –Access to innovation

	Question	Multiple choises	Cultural Industries				Creative Industries	Performing Arts & Heritage	Totals
			Film, video, radio and tv	Videogames and software	Music	Books and printing			
1.	In Your business, which of these digital services do you use?	E-commerce	47,62	56,25	57,14	25,00	42,86	21,43	38,13
		E-banking	33,33	25,00	42,86	54,55	42,86	60,71	44,38
		Electronic invoicing	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Teleworking	0,00	9,38	0,00	0,00	0,00	0,00	1,88
		Marketing tools	0,00	0,00	0,00	9,09	10,71	7,14	5,63
		E-gov services for relations with the Public Administration	0,00	0,00	0,00	0,00	0,00	3,57	0,63
		Electronic certified mail/Digital Signature	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Security	0,00	0,00	0,00	0,00	3,57	3,57	1,25
		Disaster recovery	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		None	4,76	3,13	0,00	4,55	0,00	3,57	3,13
		Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N.A	14,29	6,25	0,00	6,82	0,00	0,00	5,00
2.	For Your organization, what are the most relevant sources of knowledge?	Individual knowledge sharing	46,15	70,00	62,50	64,71	55,88	80,43	65,13
		Open Information Sources	30,77	10,00	0,00	19,61	20,59	6,52	15,90
		Closed/Paid information Sources	0,00	0,00	0,00	1,96	0,00	6,52	2,05
		Co-operation with private actors	11,54	0,00	37,50	0,00	23,53	6,52	8,72
		Co-operation with sector associations	0,00	13,33	0,00	7,84	0,00	0,00	4,10
		Co-operation with public administration	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Co-operation with university/research	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		None	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N.A	11,54	6,67	0,00	5,88	0,00	0,00	4,10
3.	In Your company what kind of research and innovation is predominant?	Scientific innovation	0,00	15,38	0,00	4,17	0,00	0,00	3,75
		Technological innovation	27,27	53,85	0,00	45,83	30,77	18,75	35,00
		Hidden innovation, such as innovative processes, new organisational models	9,09	7,69	0,00	4,17	15,38	12,50	8,75
		Creativity and soft innovation (non-functional (aesthetics) and functional)	36,36	0,00	100,00	20,83	46,15	62,50	35,00
		Design processes as drivers of user-centred innovation	0,00	0,00	0,00	0,00	0,00	6,25	1,25
		None	0,00	7,69	0,00	12,50	7,69	0,00	6,25
		N.A	27,27	15,38	0,00	12,50	0,00	0,00	10,00
3.1	If so: Did Your enterprise engage in one or more innovation activities?	In-house R&D	60,00	50,00	0,00	12,50	31,25	15,79	29,90
		External R&D	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Acquisition of machinery, equipment, software & buildings	26,67	0,00	100,00	50,00	31,25	21,05	37,11
		Acquisition of existing knowledge from other enterprises or organisations	0,00	33,33	0,00	33,33	12,50	36,84	17,53
		Training for innovative activities	13,33	16,67	0,00	4,17	12,50	10,53	10,31
		Market introduction of innovations	0,00	0,00	0,00	0,00	6,25	0,00	1,03
		Other	0,00	0,00	0,00	0,00	6,25	15,79	4,12
		N.A	0,00	0,00	0,00	0,00	0,00	0,00	0,00
3.2	What is the aim of Your organization when innovating?	Innovating to gain efficiency in the production of a service	62,50	30,00	66,67	50,00	33,33	25,00	40,30
		Innovating to match user's demands	37,50	60,00	33,33	38,89	41,67	25,00	38,81
		Innovating for aesthetical reasons	0,00	0,00	0,00	5,56	0,00	0,00	1,49
		Innovating for Social improvements	0,00	10,00	0,00	5,56	25,00	50,00	19,40
		Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
	Have there been any product innovation (goods or services)?	Yes	75,00	70,00	33,33	77,78	58,33	56,25	65,67
		No	25,00	30,00	66,67	22,22	41,67	43,75	34,33
3.3.1	If Yes: Who developed these product innovations?	Your enterprise by itself	83,33	71,43	0,00	71,43	71,43	33,33	0,00
		Your enterprise together with other enterprises or organisations	16,67	14,29	100,00	21,43	28,57	44,44	63,64
		Your enterprise by adapting or modifying goods or services originally developed by other enterprises or organisations	0,00	14,29	0,00	7,14	0,00	11,11	27,27
		Other enterprises or organisations	0,00	0,00	0,00	0,00	0,00	11,11	4,55
		Other	0,00	0,00	0,00	0,00	0,00	0,00	4,55
3.3.2	It depended on?	Your enterprise introduced a new or significantly improved product into Your market before Your competitors (it may have already been available in other markets)	33,33	57,14	100,00	21,43	28,57	77,78	72,73
		Your enterprise introduced a new or significantly improved product that was already available from Your competitors in Your market	66,67	42,86	0,00	78,57	71,43	22,22	27,27
3.3.3	What percent of Your total turnover in one year about for innovation?	0% to less than 1%	0,00	0,00	0,00	21,43	28,57	0,00	4,55
		1% to less than 5%	0,00	28,57	0,00	0,00	0,00	11,11	13,64
		5% to less than 10%	33,33	28,57	0,00	28,57	0,00	11,11	20,45
		10% to less than 25%	33,33	0,00	100,00	28,57	28,57	33,33	27,27
		25% or more	16,67	42,86	0,00	14,29	14,29	22,22	20,45
		Don't know	16,67	0,00	0,00	7,14	28,57	22,22	13,64

4.	CCIs can themselves be drivers of creativity and innovation and could be recognized as an essential part of creativity on other sectors of the economy (indirect impact). For this concept of open innovation, do you think it is necessary:	To strengthen the links between academia, knowledge institutes	18,18	30,77	0,00	25,00	23,08	56,25	30,00
		To strengthen the links between CCIs and businesses in other sectors	18,18	15,38	0,00	8,33	7,69	18,75	12,50
		To make use of rapid communication	27,27	30,77	33,33	29,17	38,46	6,25	26,25
		To make use of digital convergence	9,09	7,69	33,33	16,67	15,38	6,25	12,50
		To resort to user-driven creation through interactive networks	0,00	0,00	33,33	8,33	15,38	12,50	8,75
		Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		N.A.	27,27	15,38	0,00	12,50	0,00	0,00	10,00
5.	Does your company create an environment that encourages innovation?	The company doesn't develop specific initiatives aimed at promoting a company climate to encourage innovation	9,09	7,69	0,00	16,67	15,38	31,25	16,25
		The company has developed occasional initiatives aimed at promoting a business climate to encourage innovation	9,09	0,00	33,33	33,33	30,77	6,25	18,75
		The company encourages the generation of ideas for improvement and promotes innovation even if not structured	9,09	15,38	33,33	12,50	46,15	37,50	23,75
		The company creates an environment conducive to the generation of ideas, also through collaboration (internal and external), the development of creativity and experimentation and recognizes the contribution of staff to innovation	36,36	38,46	33,33	20,83	7,69	25,00	25,00
		The company systematically develops a set of initiatives (internal and external), measures, incentives and awards to encourage and encourage the contribution of staff to innovation and the consequent results	9,09	23,08	0,00	4,17	0,00	0,00	6,25
		N.A.	27,27	15,38	0,00	12,50	0,00	0,00	10,00

Table 19 – Co-operation

		Question	Multiple choises	Cultural Industries: Film, video, radio and tv	Cultural Industries: Videogames and software	Cultural Industries: Music	Cultural Industries: Books and printing	Creative Industries	Performing Arts & Heritage	Totals
1.		In your opinion, networks can serve:	As a source of innovation through the exchange of good practices	39,13	56,00	80,00	71,15	50,00	55,56	57,99
			As a reliable source of information	8,70	8,00	0,00	7,69	21,43	5,56	9,47
			To take advantage of mutual shared resources	30,43	16,00	20,00	13,46	25,00	25,00	20,71
			As an exchange of knowledge to strengthen the applied research of creative clusters	0,00	0,00	0,00	0,00	3,57	11,11	2,96
			Allowing people with different skills to work together and create new ideas	8,70	0,00	0,00	0,00	0,00	0,00	1,18
			To promote the internationalization of SMEs	0,00	0,00	0,00	1,92	0,00	0,00	0,59
			Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			N.A.	13,04	20,00	0,00	5,77	0,00	2,78	7,10
2.		Does Your enterprise co-operate (or plan to co-operate) with other enterprises?	Never	0,00	0,00	0,00	4,17	0,00	0,00	1,25
			Yes, with enterprise working in different sectors	9,09	7,69	0,00	29,17	46,15	37,50	26,25
			Yes, with enterprise working in the same sectors	54,55	53,85	100,00	50,00	46,15	56,25	53,75
			Not yet	9,09	0,00	0,00	4,17	7,69	0,00	3,75
			Don't know	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			N.A.	27,27	38,46	0,00	12,50	0,00	6,25	15,00
	2.1	If so: What form of co-operations does Your enterprise have?	Formal Agreement	85,71	62,50	100,00	42,11	58,33	53,33	57,81
			Non Formal Agreement	14,29	37,50	0,00	57,89	41,67	46,67	42,19
	2.2	What kind of difficulties, if any, have You had in the design and operational process of the network?	Finding organizations willing to join the network of companies	14,29	25,00	0,00	26,32	25,00	6,67	18,75
			Relations between potential participants in the network of companies	0,00	12,50	0,00	0,00	25,00	33,33	14,06
			Identification of strategic objectives	0,00	0,00	0,00	10,53	8,33	20,00	9,38
			Resources able to assist/guide in the planning and initial setting up phase	0,00	12,50	0,00	15,79	8,33	0,00	7,81
			Financial resources	57,14	25,00	33,33	10,53	16,67	33,33	25,00
			Involvement of the own structures	14,29	0,00	0,00	5,26	0,00	0,00	3,13
			No difficulties	14,29	25,00	66,67	31,58	16,67	6,67	21,88
			Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00
	2.3	Participating to the network, have, "defensive" motivation (e.g. to stay on market / to contain costs ...) or "offensive" reason (e.g. innovation, to penetrate on new markets ...), had any impact?	Mostly defensive	14,29	12,50	66,67	31,58	8,33	33,33	23,44
			Mostly offensive	0,00	62,50	0,00	21,05	41,67	6,67	25,00
			Both equally impactful	85,71	25,00	33,33	47,37	50,00	60,00	51,56
3.		Do you consider Your presence on Social network to be fundamental?	Yes	72,73	38,46	100,00	75,00	84,62	81,25	72,50
			No	0,00	23,08	0,00	12,50	15,38	12,50	12,50
			N.A.	27,27	38,46	0,00	12,50	0,00	6,25	15,00
	3.1	If yes Why do you consider it useful to be present on social media?	Because everyone does it	16,67	25,00	0,00	3,03	0,00	0,00	5,50
			Because it increases the visibility of Your brand	77,78	12,50	100,00	75,76	100,00	81,82	78,90
			Because it increases sales of our products/services	0,00	25,00	0,00	6,06	0,00	0,00	3,67
			Because it has a direct dialogue with users	0,00	37,50	0,00	12,12	0,00	13,64	9,17
			Because it gets used to increase collaboration between CCIs, nationally and internationally, within similar sectors and across sectors	5,56	0,00	0,00	3,03	0,00	4,55	2,75
4.		In the last 5 years, how many public institutions and/or associations (universities, research and training centres) did the company come into contact?	None	9,09	38,46	66,67	25,00	38,46	12,50	26,25
			From 1 to 3	27,27	7,69	33,33	50,00	38,46	12,50	31,25
			More than 3	36,36	15,38	0,00	12,50	23,08	68,75	27,50
			N.A.	27,27	38,46	0,00	12,50	0,00	6,25	15,00

D.2 Qualitative analysis of CCIs' features and challenges in Western Greece

The following sections present and analyze the features of cultural and creative industries in the region of Western Greece. A survey was conducted in a sample of 34 enterprises coming from cultural industries such as film, video, radio and tv, videogames and software, music, books and printings, and enterprises from creative industries, performing arts and heritage. Thus, the following sections will present general information of the cultural and creative enterprises, and their features and challenges in regard to access to finance, intellectual property rights, entrepreneurship, skills and training, access to innovation and cooperation.

D.2.1 General information about the CCIs in the sample

This section presents the general characteristics of the participating enterprises. Regarding their legal structure, the survey showed in the sector of creative industries the majority of them are private companies in a percentage of 14,71%, following by "other legal structure" in a percentage of 8,82% and a 2,94% associations and Social enterprises, while a percentage of 8,82% did not provide their legal structure. In the cultural industries, most of them have the structure of private companies (5,88% from sub-sector of books and printings), following by general partnership and "other" legal structure (2,94%). In the sector of performing arts and heritage, most of the participating enterprises are private companies (8,82%), while the other legal structures concentrate a percentage of 2,94%.

In total for all sectors, most of the companies are private (29,41%), following by "other" legal structure (14,71%), social enterprises (8,82%) and private capital companies (5,88%), while a big amount of companies (20,59%) did not provide their legal structure.

The total average enterprise age was 2,97 years, having in cultural industries 13,25 years in the sub-sector of books and printings, 2,69 years in performing arts and heritage and 1,71 years in creative industries.

The number of permanent employees for a percentage of 64,71% enterprises (in total) was under 10 employees, having a percentage of 5,88% enterprises with more than 10 employees, while 29,41% of participants did not answer. Finally, the average number of temporary employees is one employee in all the sectors.

Table 20 – General Information

	Question	Multiple choices	Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
			Film, video, radio & TV %	Videogames & Sofware %	Music %	Books & Printing %	%	%	%	%
1.	Legal structure of the company	Private Company	0,00	0,00	0,00	5,88	14,71	8,82	0,00	29,41
		Limited Partnership	0,00	2,94	0,00	0,00	0,00	0,00	0,00	2,94
		General Partnership	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		Limited liability Company	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		Private Capital Company	0,00	2,94	0,00	0,00	0,00	2,94	0,00	5,88
		S.A.	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Association	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		Social Enterprise (KOINSEP)	0,00	0,00	2,94	0,00	2,94	2,94	0,00	8,82
		Other	0,00	0,00	0,00	2,94	8,82	2,94	0,00	14,71
		Without legal form yet	0,00	0,00	0,00	0,00	0,00	2,94	2,94	5,88
		Start-up	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		n/a	5,88	0,00	0,00	0,00	8,82	0,00	**5,88**	20,59
2.	Average Enterprise Age		0,00	1,25	0,00	13,25	1,71	2,69	0,00	2,97
3.	Number of permanent employees	0	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
		1 to 5	2,94	5,88	0,00	5,88	17,65	20,59	0,00	52,94
		6 to 10	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		>10	0,00	0,00	2,94	0,00	2,94	0,00	0,00	5,88
		n/a	2,94	0,00	0,00	2,94	11,76	2,94	8,82	29,41
4.	Average number of temporary employees		1	1	1	1	1	1	1	1

D.2.2 Access to finance

As for the financial and economic planning adopted by the participating enterprises, 47,06% of the respondents stated that they are making an annual forecast, an 8,82% a 3 year-forecast and 2,94% a 5 year-forecast, while a respective number of enterprises translated to a percentage of 41,18% declares that is not making a forecast.

Those enterprises, which actually do a forecast, confirmed that they elaborate the forecast by themselves (70,59%) while 14,71% of them used professional consultancy and 2,94% referred to another person.

As far as it concerns, the financial support that an enterprise might have received since its business started, most of the participating enterprises (67,65%) stated that they have not received such support, in contrast with a 32,35% of enterprises which have obtained such support. The financial support that they received was coming from public funds (20,59%) and private funds (11,76%), having rated the delivery time from "long" to "too long" (8,82%), while the average percentage of their income coming from their public contribution in the last financial year was more than 10% in a percentage of 11,76%, less than 90% in a percentage of 8,82% and between 10% and 30% in a percentage of 5,88%.

The financial support mostly was given at "start-up" stage (11,76%), at "built-up" stage (8,82%) and "built-out" and "connecting" stages with 5,88%. The enterprises obtained the financial support stated that the support did improve their business and increased their revenues (20,59%) having 11,76% to state that 'they don't know" if such improvement occurred. At this point, we can mention that a big number of enterprises did not prefer answering questions about the financial support they might have received at a range of 67,65% to 76,47%.

The enterprises have different types of guarantees translated to personal and guarantee funds with 8,57% each, guarantees linked to the future profitability of a project with 5,71%, and real estate and deposits with 2,86% each. A percentage of 14,29% though declare that they don't have any type of guarantee while most of the participants did not answer.

Respondents were asked about the probability of risk capital that might occur on their investment, 17,65% believe that the probability is less than 10%, 8,82% rank the probability between 10% and 30%, while 2,94%, rank it between 31% and 70% and over 90%. A high percentage (64,71%) did not answer.

About the main obstacles that enterprises face in order to access finance, the respondents believe that the main obstacles are the difficulty in getting grants (18,03%), the risk aversion from financial institution, the time-consuming procedures for public incentives and the absence of requirements for obtaining funding with 13,11% each, and the time spent before approval of financial support (11,48%).

Finally, enterprises believe that the most adequate tools to increase the financial opportunities for their company are public grants (22,35%), private grants (12,94%), self-financing, tax incentives, vat reduction for the CC products with (11,76%) each, and donation/sponsoring with 10,59%.

The aforementioned analysis is presented in the following table (table 21).

Table 21– Access to finance

Questions		Multiple Choices	Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
			Film, video, radio & TV	Videogames & Sofware	Music	Books & Printing				
			%	%	%	%	%	%	%	%
1.	Does your organization make any financial and economic planning (budget and updated business plan)?	No	5,88	0,00	2,94	5,88	20,59	2,94	2,94	41,18
		Yes: 1 year forecast	0,00	5,88	0,00	2,94	14,71	17,65	5,88	47,06
		Yes: up to 3 years forecast	0,00	0,00	0,00	0,00	5,88	2,94	0,00	8,82
		Yes: up to 5 years forecast	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		n/a	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
1.1	If yes, how do you elaborate the forecast?	By yourself	2,94	2,94	2,94	8,82	26,47	20,59	5,88	70,59
		Using professional Consultancy	0,00	2,94	0,00	0,00	8,82	0,00	2,94	14,71
		By other person	2,94	0,00	0,00	0,00	0,00	0,00	0,00	2,94
		n/a	0,00	0,00	0,00	2,94	5,88	2,94	0,00	11,76
2.	Have you obtained a financial support since your business has started?	Yes	0,00	2,94	2,94	8,82	11,76	5,88	0,00	32,35
		No	5,88	2,94	0,00	2,94	29,41	17,65	8,82	67,65
2.1	If yes, what type of funding did you receive?	Public	0,00	2,94	0,00	8,82	2,94	5,88	0,00	20,59
		Private	0,00	0,00	2,94	0,00	8,82	0,00	0,00	11,76
		Both public and private	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	5,88	2,94	0,00	2,94	29,41	17,65	8,82	67,65
2.1.1	If you received public funding, how would you rate the delivery time of the loan obtained?	Too long	0,00	2,94	0,00	0,00	2,94	2,94	0,00	8,82
		Long	0,00	0,00	0,00	5,88	2,94	0,00	0,00	8,82
		In the norm	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		short	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Well timed	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		n/a	5,88	2,94	2,94	2,94	35,29	17,65	8,82	76,47
2.2.2	On average, what was the percentage of your income coming from your public contribution in the last financial year?	< 10%	0,00	2,94	0,00	2,94	2,94	2,94	0,00	11,76
		10%-30%	0,00	0,00	2,94	2,94	0,00	0,00	0,00	5,88
		31%-50%	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		51%-70%	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		71%-90%	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		>90%	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
		n/a	5,88	2,94	0,00	5,88	29,41	17,65	8,82	70,59
2.2	At what stage of the entrepreneurial lifecycle did you receive this financial support?	Start-up	0,00	0,00	0,00	2,94	8,82	0,00	0,00	11,76
		Build-up	0,00	2,94	0,00	0,00	2,94	2,94	0,00	8,82
		Build-out	0,00	0,00	0,00	2,94	0,00	2,94	0,00	5,88
		Connecting	0,00	0,00	2,94	2,94	0,00	0,00	0,00	5,88
		n/a	5,88	2,94	0,00	2,94	29,41	17,65	8,82	67,65
2.3	Did the financial support improve your business with an increase in revenues?	Yes	0,00	0,00	0,00	8,82	5,88	5,88	0,00	20,59
		No	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		I do not know	0,00	2,94	2,94	0,00	5,88	0,00	0,00	11,76
		n/a	5,88	2,94	0,00	2,94	29,41	17,65	8,82	67,65
3.	What type of warranty do you usually use?	Personal guarantees	0,00	0,00	2,86	0,00	2,86	2,86	0,00	8,57
		Real estate guarantees	0,00	0,00	0,00	2,86	0,00	0,00	0,00	2,86
		Deposits	0,00	2,86	0,00	0,00	0,00	0,00	0,00	2,86
		Guarantee funds	2,86	0,00	0,00	2,86	2,86	0,00	0,00	8,57
		Discussion of the business plan (guarantees linked to the future profitability of a project	0,00	0,00	0,00	0,00	5,71	0,00	0,00	5,71
		None	0,00	0,00	0,00	2,86	5,71	5,71	0,00	14,29
		n/a	2,86	2,86	0,00	2,86	25,71	14,29	8,57	57,14
4.	On average, what is the percentage of risk capital on your total investment?	< 10%	0,00	2,94	2,94	5,88	0,00	5,88	0,00	17,65
		10%-30%	0,00	0,00	0,00	0,00	5,88	2,94	0,00	8,82
		31%-50%	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		51%-70%	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		71%-90%	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		>90%	2,94	0,00	0,00	0,00	0,00	0,00	0,00	2,94
		n/a	2,94	2,94	0,00	2,94	32,35	14,71	8,82	64,71
5.	What are the main obstacles for your organization to access finance?	Risk aversion from financial institution	0,00	0,00	0,00	0,00	11,48	1,64	0,00	13,11
		Difficulty in getting grants	1,64	0,00	1,64	3,28	8,20	1,64	1,64	18,03
		Time consuming procedures for public incentives	1,64	1,64	0,00	0,00	4,92	3,28	1,64	13,11
		No bank loan guarantees	0,00	0,00	0,00	1,64	3,28	1,64	0,00	6,56
		Public fund shortage	1,64	0,00	1,64	0,00	0,00	1,64	0,00	4,92
		High interest rate	0,00	0,00	0,00	1,64	1,64	1,64	0,00	4,92
		Time spent before approval of financial support	0,00	1,64	0,00	0,00	3,28	4,92	1,64	11,48
		Absence of requirements for obtaining funding	0,00	0,00	0,00	1,64	8,20	3,28	0,00	13,11
		Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Immaturity of venture capital in Greece	0,00	0,00	0,00	0,00	1,64	0,00	0,00	1,64
		No need for any kind of funding	0,00	0,00	0,00	1,64	0,00	0,00	0,00	1,64
		Did not try to get any kind of funding	0,00	1,64	0,00	0,00	0,00	0,00	0,00	1,64
		Risk aversion by individual	0,00	0,00	0,00	0,00	0,00	0,00	1,64	1,64
		lack of funding in this sector	1,64	0,00	0,00	0,00	0,00	1,64	0,00	3,28
		n/a	0,00	0,00	0,00	0,00	1,64	3,28	0,00	4,92
6.	What do you think is the most adequate tool to increase financial opportunities for your company?	Public grants	1,18	2,35	0,00	1,18	11,76	4,71	1,18	22,35
		Self-financing	0,00	2,35	0,00	2,35	2,35	3,53	1,18	11,76
		Bank loan	0,00	1,18	0,00	0,00	2,35	1,18	0,00	4,71
		Tax incentives	0,00	1,18	0,00	2,35	7,06	1,18	0,00	11,76
		Risk capital	0,00	0,00	0,00	0,00	1,18	0,00	0,00	1,18
		Vat reduction for the CC products	2,35	0,00	0,00	1,18	4,71	3,53	0,00	11,76
		Donation/sponsoring	2,35	0,00	1,18	0,00	4,71	2,35	0,00	10,59
		Micro credit fund	0,00	0,00	0,00	0,00	0,00	1,18	0,00	1,18
		Private grants	1,18	0,00	1,18	0,00	7,06	1,18	2,35	12,94
		Innovation vouchers	0,00	0,00	0,00	0,00	1,18	1,18	1,18	3,53
		Seed financing	0,00	0,00	0,00	0,00	2,35	0,00	1,18	3,53
		Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Much more readers	0,00	0,00	0,00	1,18	0,00	0,00	0,00	1,18
		Clientele growth in creative and cultural industry	0,00	0,00	0,00	0,00	0,00	1,18	0,00	1,18
		Advertizing	0,00	0,00	0,00	0,00	0,00	1,18	0,00	1,18
		n/a	0,00	0,00	0,00	0,00	0,00	1,18	0,00	1,18

D.2.3 Access to market

The lack of finance constitutes the most important business-related challenge starting the business with 31,88%, then the high tax burdens with 17,39%, the limited knowledge of how to run a business along with lack of knowledge about the market with 14,49% each, following by the lack of social security tailored to the needs of CCIs and the high competition in the market with 8,7% and 7,25% accordingly.

On the other side, the most relevant managerial factors that support the growth of the business according to respondents are communication skills with 16,83%, the strategic vision with 14,85%, and creative thinking with 13,86%.

Using a Likert scale from (1) most relevant to (5) least relevant to determine the most relevant cost factors which obstruct the company's growth, we considered the sum of both percentages ‘most relevant’ and ‘relevant’ answers for every factor. Thus, according to respondents, the cost factors are ranked according to their effect on the business as follows: the scarce access to finance outside the firm in a percentage of 58,82%, the cost of labor obstruct the business in a percentage of 41,18% and the cost of knowledge in a percentage of 32,35%.

The enterprises have identified the price competition, along with the cost of production and the lack of business mechanism as the most important barriers for their business at the national level having a percentage of 21,62% each.

As far as it concerns, the ability of companies in exploring, identifying, and selecting new opportunities and markets, the 38,24% declare that they have the ability to identify new opportunities and they have defined mechanisms for their collection and selection, 23,53% declare that opportunities and new markets are identified on an occasional basis, 20,59% state that they have the ability to identify new opportunities but a mechanism for their collection and selection is not defined, while a 14,71% states that they have a systematic and integrated process for harness opportunities; they anticipate market expectations by assuming leadership positions.

The majority of the respondents (52,94%) believe that their company does not have limited knowledge about market opportunities while 44,12% of them believe that they do have limited knowledge, and the best way to reduce this gap is to peer assist at a percentage of 20,59%, while a percentage of 8,82% believe that they need to have organizational improvement and knowledge of marketplace.

In the question, if the companies would take new internationalization initiatives in the future, 52,94% answered positively and only the 8,82% negatively, while 32,35% didn't know.

The main reasons which prevent the companies from being present at foreign markets are:

- The nature of the product with 22,22%;
- The financial impediments with 19,44%;
- The scarcity of infrastructure, difficulties in local connections with 8,33%;
- The management and control difficulties and regulatory impediments with 5,56% each.

Table 22 – Access to market

	Questions	Multiple Choices		Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
				Film, video, radio & TV	Videogames & Sofware	Music	Books & Printing				
				%	%	%	%	%	%	%	%
1.	Which was the most important business-related challenge when starting your company?	Lack of finance		2,90	1,45	1,45	2,90	13,04	5,80	4,35	31,88
		Limited knowledge of how to run a business		0,00	1,45	1,45	1,45	5,80	2,90	1,45	14,49
		High competition in the market		0,00	0,00	0,00	2,90	0,00	2,90	1,45	7,25
		Lack of knowledge about the market		1,45	0,00	0,00	0,00	11,59	1,45	0,00	14,49
		High tax burdens		1,45	2,90	0,00	1,45	8,70	2,90	0,00	17,39
		Lack of social security tailored to the needs of CCIs		1,45	1,45	0,00	0,00	2,90	2,90	0,00	8,70
		Cost of intellectual property rights		0,00	0,00	0,00	1,45	0,00	1,45	0,00	2,90
		Other:		0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Bureaucracy		0,00	0,00	0,00	0,00	1,45	0,00	0,00	1,45
		Lack of knowledge for social enterprise		0,00	0,00	0,00	0,00	0,00	1,45	0,00	1,45
2.	What are the most relevant managerial factors that support the growth of your organization?	Leadership skills		0,99	1,98	0,00	0,99	0,99	0,99	0,99	6,93
		Strategic vision		0,99	0,99	0,00	2,97	5,94	3,96	0,00	14,85
		Marketing skills		0,00	0,99	0,99	0,00	3,96	0,99	0,99	7,92
		Communication skills		0,99	0,99	0,99	2,97	4,95	3,96	1,98	16,83
		Problem solving skills		0,00	0,00	0,00	0,99	4,95	1,98	0,99	8,91
		Good Business Plans		0,00	0,00	0,00	0,00	3,96	0,00	0,00	3,96
		Administrative/financial skills		0,00	0,00	0,00	0,99	3,96	0,99	0,00	5,94
		Management skills		0,00	0,99	0,00	0,99	4,95	0,99	0,99	8,91
		Ability to track investors		0,00	0,00	0,00	0,00	1,98	1,98	0,99	4,95
		Ability to access external business advice/support		0,99	0,00	0,00	0,00	2,97	1,98	0,00	5,94
		Creative thinking		1,98	0,00	0,00	1,98	5,94	2,97	0,99	13,86
		Other:		0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Low cost to run the business		0,00	0,00	0,00	0,00	0,99	0,00	0,00	0,99
3.	What is the most relevant cost factors, which obstruct your organization's growth? Please rank them 1 (most relevant) to 5 (least relevant)	Cost of labor	1	2,94	2,94	0,00	0,00	5,88	2,94	2,94	17,65
			2	0,00	0,00	0,00	5,88	8,82	8,82	0,00	23,53
			3	0,00	0,00	2,94	2,94	23,53	5,88	2,94	38,24
			4	0,00	0,00	0,00	0,00	2,94	0,00	2,94	5,88
			5	2,94	2,94	0,00	0,00	0,00	5,88	0,00	11,76
			n/a	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		Cost of knowledge	1	0,00	2,94	0,00	0,00	5,88	2,94	0,00	11,76
			2	0,00	0,00	2,94	0,00	11,76	2,94	2,94	20,59
			3	2,94	0,00	0,00	2,94	8,82	8,82	2,94	26,47
			4	0,00	2,94	0,00	0,00	14,71	2,94	0,00	20,59
			5	2,94	0,00	0,00	2,94	0,00	2,94	2,94	11,76
			n/a	0,00	0,00	0,00	5,88	0,00	2,94	0,00	8,82
		Scarce access to finance outside the firm	1	2,94	0,00	0,00	2,94	11,76	11,76	2,94	32,35
			2	0,00	0,00	2,94	2,94	11,76	5,88	2,94	26,47
			3	2,94	5,88	0,00	0,00	2,94	0,00	0,00	11,76
			4	0,00	0,00	0,00	2,94	8,82	2,94	0,00	14,71
			5	0,00	0,00	0,00	2,94	2,94	0,00	2,94	8,82
			n/a	0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
4.	What is the most important entry barrier for your organization at national level?	Price competition		0,00	5,41	0,00	5,41	5,41	5,41	0,00	21,62
		Access to knowledge		2,70	0,00	0,00	0,00	5,41	0,00	0,00	8,11
		Exclusive agreement with Key Distributors		0,00	0,00	0,00	0,00	5,41	2,70	0,00	8,11
		Presence of strong brands		0,00	0,00	0,00	0,00	0,00	2,70	2,70	5,41
		Cost of production		2,70	0,00	2,70	0,00	5,41	5,41	5,41	21,62
		Lack of business mechanism		0,00	0,00	0,00	2,70	13,51	2,70	2,70	21,62
		Lack of entrepreneurial skills		0,00	0,00	0,00	0,00	2,70	0,00	0,00	2,70
		Other:		0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Lack of marketing		0,00	0,00	0,00	2,70	0,00	0,00	0,00	2,70
		The low level in the art market		0,00	0,00	0,00	0,00	0,00	2,70	0,00	2,70
		Clientele growth in creative and cultural industry		0,00	0,00	0,00	0,00	0,00	2,70	0,00	2,70
		n/a		0,00	0,00	0,00	0,00	2,70	0,00	0,00	2,70
5.	Does the company explore, identify, and select new opportunities and markets?	Opportunities and new markets are identified on an occasional basis		2,94	0,00	2,94	2,94	11,76	2,94	0,00	23,53
		We have the ability to identify new opportunities but a mechanism for their collection and selection is not defined		2,94	2,94	0,00	0,00	8,82	2,94	2,94	20,59
		We have the ability to identify new opportunities and we have defined mechanisms for their collection and selection		0,00	2,94	0,00	2,94	14,71	11,76	5,88	38,24
		We have a systematic and integrated process for harness opportunities;we anticipate market expectations by assuming leadership positions		0,00	0,00	0,00	5,88	5,88	2,94	0,00	14,71
		n/a		0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94

Questions		Multiple Choices	Cultural Industries: Film, video, radio & TV %	Cultural Industries: Videogames & Sofware %	Cultural Industries: Music %	Cultural Industries: Books & Printing %	Creative Industries %	Performing Arts & Heritage %	Sector Missing %	Totals %
6.	Do you think that your organization have a limited knowledge about market opportunities?	Yes	2,94	0,00	0,00	2,94	26,47	5,88	5,88	44,12
		No	2,94	5,88	2,94	8,82	14,71	14,71	2,94	52,94
		n/a	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
	6.1 If yes, what do you think is the best way to reduce this gap?	Organizational improvement	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
		Knowledge of marketplace	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
		Peer assist	2,94	0,00	0,00	2,94	5,88	5,88	2,94	20,59
		Technology upgrade	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		Public support	0,00	0,00	0,00	2,94	2,94	0,00	0,00	5,88
		other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	2,94	5,88	2,94	8,82	11,76	14,71	5,88	52,94
7.	Does the company would take new internationalization initiatives in the future?	Yes	2,94	2,94	0,00	0,00	29,41	14,71	2,94	52,94
		No	0,00	0,00	0,00	2,94	2,94	2,94	0,00	8,82
		I do not know	2,94	2,94	2,94	8,82	5,88	2,94	5,88	32,35
		n/a	0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
8.	If the company is not present on foreign markets, indicate the reason:	Nature of the product	2,78	0,00	0,00	8,33	2,78	8,33	0,00	22,22
		Explicit company choice	0,00	0,00	0,00	0,00	2,78	0,00	0,00	2,78
		Difficulties in cultural or linguist approach	0,00	0,00	0,00	2,78	0,00	0,00	0,00	2,78
		Difficulty in identifying management on the spot	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Management and control difficulties	0,00	0,00	0,00	0,00	0,00	5,56	0,00	5,56
		No assistance from public agencies in charge	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Scarcity of infrastructure, difficulties in local connections	0,00	0,00	0,00	0,00	8,33	0,00	0,00	8,33
		Administrative/bureaucratic impediments	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Regulatory impediments	0,00	0,00	0,00	0,00	5,56	0,00	0,00	5,56
		Financial impediments	2,78	0,00	2,78	0,00	11,11	0,00	2,78	19,44
		Lack of protection of trademarks	0,00	0,00	0,00	0,00	2,78	0,00	0,00	2,78
		n/a	0,00	5,56	0,00	2,78	8,33	8,33	5,56	30,56
9.	Does the company develop the ICT/New Technologies?	The company makes limited use of IT resources	0,00	0,00	2,94	5,88	11,76	5,88	2,94	29,41
		The ICT business systems support the management of various internal processes with an adequate level of integration	2,94	2,94	0,00	0,00	8,82	2,94	0,00	17,65
		The ICT business systems support the management of various external processes with an adequate level of integration	2,94	2,94	0,00	0,00	8,82	2,94	2,94	20,59
		The ICT business systems support in an integrated manner all processes and decisions, strategic and operational, both internally and externally in relation to customers, suppliers and partners	0,00	0,00	0,00	5,88	11,76	11,76	2,94	32,35
10.	Could government encourage and provide appropriate support to enable CCI SMEs to better access opportunities on the market?	Support in incubators	2,5	2,5	0	2,5	12,5	7,5	3,75	31,25
		Gaining a market position	1,25	0	0	1,25	3,75	0	0	6,25
		Public procurement (used to increase the demand for specific innovative products and services)	1,25	1,25	0	1,25	3,75	0	0	7,5
		Lead market initiative (set to identify the new needs and new market for innovative products or services)	0	0	0	1,25	6,25	6,25	2,5	16,25
		Standardisation (setting up a playing field for innovators, accompanying the emergence of new markets and facilitating the spread of technology)	0	1,25	0	2,5	8,75	3,75	2,5	18,75
		Access to knowledge	2,5	0	0	2,5	6,25	3,75	1,25	16,25
		Other:	0	0	0	0	0	0	0	0
		Funding	0	0	0	0	0	1,25	0	1,25
		Tax incentives	0	0	0	0	1,25	0	0	1,25
		n/a	0	0	1,25	0	0	0	0	1,25

On company's ability to develop ICT/New Technologies, the survey showed that the ICT business systems support in an integrated manner all processes and decisions, strategic and operational, both internally and externally concerning customers, suppliers and partners (32,35%) while 29,41% of the participating companies make limited use of IT resources.

According to respondents, the government encourages and provides appropriate support to enable CCI SMEs to better access opportunities on the market in the following ways: support in incubators 31,25%, standardization 18,75%, lead market initiative and access to knowledge 16,25% each.

D.2.4 Intellectual Property Rights (IPR)

In this section, the participating companies were asked to answer questions regarding intellectual property rights. Starting with the evaluation of the effectiveness of national IPR legislation and policies, the survey showed that enterprises are not satisfied with the effectiveness of IPR national legislation and policies, since they evaluate them as less effective 32,35% and not ineffective or effective at a percentage of 23,53% while a percentage of 32,35% couldn't evaluate the effectiveness. Only a small part of the sample (2,94%) find the legislation and policies quite or much effective.

Regardless of the effectiveness of IPR legislation and policies, participating enterprises showed their understanding of the importance of IPR and the need to protect their patents, trademarks, industrial designs, copyrights, etc in a percentage of 73,53% much important and 11,76% quite important.

Even though the enterprises know how important is to protect their IP, the majority of them (70,59%) do not have intellectual property rights and only 26,47% of the companies have. Those who have IPR declare that they have rights on trademarks and confidentiality agreements (7,69%), patents and copyrights (5,13%) accordingly and open access licensing (2,56%), while 7,69% did not prefer answering the question and 2,56% did not own any IPR. The protected works were photographic works and computer software 7,32% each, musical works 4,88%, and 2,44% for literary works, broadcasting rights, artwork, maps and technical drawings, cinematographic works, innovation and architectural studies and projects. The amount of enterprises that did not provide an answer came up to 61,54% for the rights and 63,41% for the protected works.

Enterprises seem to have received advice of IPR 55,88%. Most of them highlighted the need for laws and services in order to curb the illegitimate reuse of somebody else's work and for greater accessibility that enables them from sharing and reaching the existing content by unlocking the potential benefits offered, at a percentage of 32,35% each. The need for technologies to regulate and protect content with technological protection measures such as digital rights management and the need for improving knowledge was rated at 14,71%.

Table 23 presents the answers as were given during the survey.

Table 23 – Intellectual Property Rights (IPR)

	Questions	Multiple Choices	Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
			Film, video, radio & TV	Videogames & Sofware	Music	Books & Printing				
			%	%	%	%	%	%	%	%
1.	How do you evaluate the effectiveness of national IPR (intellectual property rights) legislation and policies	Ineffective	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Less effective	2,94	0,00	2,94	2,94	20,59	0,00	2,94	32,35
		Not ineffective or effective	0,00	2,94	0,00	0,00	8,82	5,88	5,88	23,53
		Quite effective	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
		Much effective	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		I do not know	2,94	2,94	0,00	5,88	11,76	8,82	0,00	32,35
		n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
2.	In your view, how much important is that businesses understand how to protect their IP e.g pantents, trademarks, industrial designs, copyrights	Not important	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Less important	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		Not unimportant or important	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		Quite important	0,00	2,94	0,00	0,00	0,00	5,88	2,94	11,76
		Much important	5,88	0,00	2,94	11,76	35,29	11,76	5,88	73,53
		I do not know	0,00	2,94	0,00	0,00	0,00	0,00	0,00	2,94
		n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
3.	Has your company any of intellectual property rights?	Yes	2,94	0,00	0,00	0,00	11,76	8,82	2,94	26,47
		No	2,94	5,88	2,94	11,76	29,41	11,76	5,88	70,59
		Rather not answer	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		I do not have any intellectual property rights	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		I am not aware of what an intellectual property is	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
3.1	If yes, what rights it benefits from?	Patents	0,00	0,00	0,00	0,00	5,13	0,00	0,00	5,13
		Trade marks	0,00	0,00	0,00	0,00	5,13	2,56	0,00	7,69
		Designs	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Copyrights	0,00	0,00	0,00	0,00	2,56	2,56	0,00	5,13
		Confidentiality agreements	0,00	0,00	0,00	0,00	5,13	2,56	0,00	7,69
		Open Access Licensing	0,00	0,00	0,00	0,00	0,00	0,00	2,56	2,56
		You do not own any IP	2,56	0,00	0,00	0,00	0,00	0,00	0,00	2,56
		You do not know what IP is	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Prefer not to say	2,56	0,00	0,00	0,00	2,56	2,56	0,00	7,69
		Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	0,00	5,13	2,56	10,26	25,64	12,82	5,13	61,54
3.2	If yes, what are the protected works?	Literary works	0,00	0,00	0,00	0,00	0,00	2,44	0,00	2,44
		Musical works	2,44	0,00	0,00	0,00	0,00	2,44	0,00	4,88
		Broadcasting rights	2,44	0,00	0,00	0,00	0,00	0,00	0,00	2,44
		Artwork	0,00	0,00	0,00	0,00	0,00	2,44	0,00	2,44
		Maps and technical drawings	0,00	0,00	0,00	0,00	0,00	2,44	0,00	2,44
		Photographic works	2,44	0,00	0,00	0,00	2,44	2,44	0,00	7,32
		Cinematographic works	2,44	0,00	0,00	0,00	0,00	0,00	0,00	2,44
		Computer software	0,00	0,00	0,00	0,00	4,88	0,00	2,44	7,32
		Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Innovation	0,00	0,00	0,00	0,00	2,44	0,00	0,00	2,44
		Architectural studies and projects	0,00	0,00	0,00	0,00	2,44	0,00	0,00	2,44
		n/a	0,00	4,88	2,44	9,76	24,39	17,07	4,88	63,41
4.	Have you ever receive advice on intellectual property rights?	No	0,00	0,00	0,00	5,88	11,76	8,82	2,94	29,41
		Yes	5,88	5,88	0,00	5,88	26,47	5,88	5,88	55,88
		I do not know	0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
		n/a	0,00	0,00	2,94	0,00	0,00	5,88	0,00	8,82
5.	Strategically, as regards intellectual property do you highlight the need for:	Laws and services in order to curb the illegitimate reuse of somebody else's work	2,94	0,00	0,00	2,94	14,71	5,88	5,88	32,35
		Technologies to regulate and protect content with technological protection measures such as digital rights management	0,00	0,00	0,00	2,94	5,88	2,94	2,94	14,71
		Allowing greater accessibility in order to be able to share and freely access existing content as a means of unlocking the potential benefits that this can offer	2,94	2,94	2,94	2,94	14,71	5,88	0,00	32,35
		Improving knowledge	0,00	2,94	0,00	2,94	5,88	2,94	0,00	14,71
		No need	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88

D.2.5 Entrepreneurship, skills and training

This section analyzes the entrepreneurship along with the entrepreneurial skills and training needs for the enterprises. Using a Likert scale from (1) most relevant to (5) least relevant, to define the most relevant entrepreneurial skills for the companies, we took into account the sum of both percentages ‘most relevant’ and ‘relevant’ answers. Thus, according to the survey, as the most important entrepreneurial skills are considered:

- Communication skills and creative thinking (61,76%).
- Leadership skills (52,94%).
- Problem-solving skills (50%).
- Networking skills (38,24%).
- Administrative/financial skills (35,29%).
- Readiness to take risks and marketing skills (32,35%).
- International export vision (29,41%).

The most relevant sources of education and training are considered the universities/educational institutions (44,07%), followed by private non-profit institutions (18,64%) and consultancy services (13,56%).

For the companies to define, in terms of importance, the most relevant factors in supporting their business, the importance is ranked from "most relevant" to "least relevant". Therefore, by considering the sum of the "most relevant" and "relevant" answers, the factors were evaluated by the companies as follows:

- Use of technology (61,76%);
- Use of design as a business strategy and networking opportunities (58,82%);
- Facilitating the exchange of knowledge within the CCIs, between experienced and inexperienced CCIs (52,94%);
- Financial access (48,57%);
- Training opportunities (44,12%);
- Support in providing R&D (29,41%);
- Business advice (26,47%).

Most of the participating enterprises declare that they gain the entrepreneurial skills through internships and on-site learning experiences or learning by doing (23,17%), informal personal networks (17,07%), basic training in project coordination, team building and peer to peer networking (13,41%) and graduation and postgraduate education in entrepreneurial and business skills (12,20%).

Finally, the majority of the participating enterprises believe that there is a need for the development of advice and support centers specifically for the creative and cultural services, 47,06% much needed and 35,29% quite needed.

Table 24 – Entrepreneurship, skills and training

Questions		Multiple Choices		Cultural Industries: Film, video, radio & TV %	Cultural Industries: Videogames & Sofware %	Cultural Industries: Music %	Cultural Industries: Books & Printing %	Creative Industries %	Performing Arts & Heritage %	Sector Missing %	Totals %
1.	What are the most relevant entrepreneurial skills for your organization?Please rank them 1 (most relevant) to 5 (least relevant)	Ladership skills	1	2,94	5,88	0,00	2,94	8,82	5,88	2,94	29,41
			2	0,00	0,00	2,94	0,00	11,76	2,94	5,88	23,53
			3	0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
			4	0,00	0,00	0,00	5,88	11,76	0,00	0,00	17,65
			5	2,94	0,00	0,00	2,94	5,88	5,88	0,00	17,65
			n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
		Communication skills	1	2,94	2,94	2,94	5,88	11,76	8,82	2,94	38,24
			2	0,00	2,94	0,00	0,00	8,82	5,88	5,88	23,53
			3	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
			4	0,00	0,00	0,00	0,00	5,88	0,00	0,00	5,88
			5	2,94	0,00	0,00	5,88	11,76	5,88	0,00	26,47
			n/a	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		Problem solving skills	1	0,00	5,88	2,94	2,94	14,71	2,94	2,94	32,35
			2	0,00	0,00	0,00	2,94	2,94	5,88	5,88	17,65
			3	2,94	0,00	0,00	0,00	8,82	2,94	0,00	14,71
			4	0,00	0,00	0,00	2,94	5,88	2,94	0,00	11,76
			5	2,94	0,00	0,00	2,94	8,82	2,94	0,00	17,65
			n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
		Networking skills	1	0,00	5,88	0,00	0,00	8,82	5,88	2,94	23,53
			2	2,94	0,00	2,94	2,94	2,94	0,00	2,94	14,71
			3	0,00	0,00	0,00	8,82	8,82	0,00	2,94	20,59
			4	0,00	0,00	0,00	0,00	14,71	8,82	0,00	23,53
			5	2,94	0,00	0,00	0,00	5,88	5,88	0,00	14,71
			n/a	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		Administrative/ financial skills	1	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
			2	0,00	5,88	2,94	0,00	0,00	14,71	2,94	26,47
			3	2,94	0,00	0,00	8,82	14,71	0,00	5,88	32,35
			4	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
			5	2,94	0,00	0,00	2,94	8,82	2,94	0,00	17,65
			n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
		Readiness to take risks	1	0,00	0,00	0,00	0,00	5,88	2,94	2,94	11,76
			2	0,00	0,00	0,00	0,00	11,76	2,94	5,88	20,59
			3	0,00	5,88	2,94	5,88	8,82	8,82	0,00	32,35
			4	2,94	0,00	0,00	0,00	11,76	0,00	0,00	14,71
			5	2,94	0,00	0,00	5,88	2,94	2,94	0,00	14,71
			n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
		Marketing skills	1	0,00	0,00	2,94	0,00	5,88	2,94	2,94	14,71
			2	0,00	2,94	0,00	0,00	5,88	5,88	2,94	17,65
			3	2,94	0,00	0,00	5,88	8,82	2,94	0,00	20,59
			4	0,00	0,00	0,00	5,88	11,76	0,00	2,94	20,59
			5	2,94	2,94	0,00	0,00	8,82	5,88	0,00	20,59
			n/a	0,00	0,00	0,00	0,00	0,00	5,88	0,00	5,88
		Creative thinking	1	2,94	2,94	0,00	5,88	23,53	11,76	5,88	52,94
			2	0,00	0,00	2,94	0,00	2,94	2,94	0,00	8,82
			3	0,00	2,94	0,00	0,00	0,00	0,00	2,94	5,88
			4	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			5	0,00	0,00	0,00	5,88	11,76	2,94	0,00	20,59
			n/a	2,94	0,00	0,00	0,00	2,94	5,88	0,00	11,76
		International export vision	1	0,00	2,94	0,00	2,94	11,76	2,94	0,00	20,59
			2	2,94	0,00	2,94	0,00	0,00	0,00	2,94	8,82
			3	2,94	2,94	0,00	2,94	2,94	5,88	2,94	20,59
			4	0,00	0,00	0,00	0,00	8,82	0,00	2,94	11,76
			5	0,00	0,00	0,00	5,88	14,71	11,76	0,00	32,35
			n/a	0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
2.	What are the most relevant sources of education and training for your organization?	Universities/Educational institutions		3,39	3,39	1,69	3,39	18,64	10,17	3,39	44,07
		Public research institutes		1,69	0,00	0,00	1,69	1,69	0,00	0,00	5,08
		Private non-profit institutions		3,39	0,00	0,00	1,69	11,86	1,69	0,00	18,64
		Specialised public/semi-public innovation support		0,00	0,00	0,00	0,00	5,08	1,69	1,69	8,47
		Consultancy services		1,69	0,00	0,00	3,39	3,39	5,08	0,00	13,56
		Other:		0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Self-educated		0,00	0,00	0,00	0,00	1,69	0,00	0,00	1,69
		Research via the web		0,00	1,69	0,00	0,00	0,00	0,00	1,69	3,39
		Specialized seminars		0,00	0,00	0,00	0,00	0,00	1,69	0,00	1,69
		International organizations		0,00	0,00	0,00	0,00	1,69	0,00	0,00	1,69
		n/a		0,00	0,00	0,00	0,00	1,69	0,00	0,00	1,69

Questions		Multiple Choices		Cultural Industries Film, video, radio & TV %	Cultural Industries Videogames & Sofware %	Cultural Industries Music %	Cultural Industries Books & Printing %	Creative Industries %	Performing Arts & Heritage %	Sector Missing %	Totals %
3.	From the following factors, please rank in order of importance the most relevant factors in supporting your organization. Please rank them 1 (most relevant) to 5 (least relevant)	Use of technology	1	2,94	5,88	0,00	2,94	2,94	14,71	5,88	35,29
			2	0,00	0,00	2,94	2,94	17,65	0,00	2,94	26,47
			3	0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
			4	0,00	0,00	0,00	0,00	8,82	0,00	0,00	8,82
			5	2,94	0,00	0,00	5,88	8,82	2,94	0,00	20,59
			n/a	0,00	0,00	0,00	0,00	0,00	2,94	0,00	2,94
		Use of design as a business stategy	1	2,94	2,94	0,00	2,94	5,88	11,76	5,88	32,35
			2	0,00	2,94	2,94	0,00	11,76	5,88	2,94	26,47
			3	2,94	0,00	0,00	2,94	8,82	0,00	0,00	14,71
			4	0,00	0,00	0,00	0,00	11,76	0,00	0,00	11,76
			5	0,00	0,00	0,00	5,88	2,94	5,88	0,00	14,71
			n/a	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Support in providing R&D	1	0,00	2,94	0,00	0,00	2,94	5,88	5,88	17,65
			2	0,00	0,00	0,00	0,00	8,82	2,94	0,00	11,76
			3	2,94	2,94	2,94	2,94	14,71	2,94	0,00	29,41
			4	0,00	0,00	0,00	2,94	8,82	5,88	2,94	20,59
			5	2,94	0,00	0,00	2,94	5,88	0,00	0,00	11,76
			n/a	0,00	0,00	0,00	2,94	0,00	5,88	0,00	8,82
		Networking Opportunities	1	0,00	5,88	0,00	5,88	11,76	11,76	5,88	41,18
			2	2,94	0,00	2,94	0,00	8,82	2,94	0,00	17,65
			3	0,00	0,00	0,00	0,00	2,94	5,88	2,94	11,76
			4	0,00	0,00	0,00	0,00	5,88	0,00	0,00	5,88
			5	2,94	0,00	0,00	5,88	11,76	2,94	0,00	23,53
			n/a	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		Business Advice	1	0,00	0,00	0,00	0,00	5,88	5,88	2,94	14,71
			2	2,94	0,00	2,94	0,00	0,00	2,94	2,94	11,76
			3	2,94	2,94	0,00	2,94	17,65	2,94	0,00	29,41
			4	0,00	2,94	0,00	2,94	8,82	5,88	2,94	23,53
			5	0,00	0,00	0,00	2,94	5,88	0,00	0,00	8,82
			n/a	0,00	0,00	0,00	2,94	2,94	5,88	0,00	11,76
		Facilitating the exchange of knowledge within the CCIs, between experienced and inexperienced CCIs	1	0,00	2,94	0,00	0,00	8,82	8,82	5,88	26,47
			2	2,94	0,00	2,94	0,00	8,82	11,76	0,00	26,47
			3	2,94	2,94	0,00	2,94	5,88	0,00	0,00	14,71
			4	0,00	0,00	0,00	0,00	14,71	2,94	0,00	17,65
			5	0,00	0,00	0,00	2,94	0,00	0,00	2,94	5,88
			n/a	0,00	0,00	0,00	5,88	2,94	0,00	0,00	8,82
		Financial Access	1	2,86	5,71	0,00	0,00	11,43	8,57	5,71	34,29
			2	0,00	0,00	2,86	2,86	5,71	0,00	2,86	14,29
			3	2,86	0,00	0,00	0,00	2,86	5,71	0,00	11,43
			4	0,00	2,86	0,00	2,86	11,43	2,86	0,00	20,00
			5	0,00	0,00	0,00	2,86	8,57	0,00	0,00	11,43
			n/a	0,00	0,00	0,00	2,86	0,00	5,71	0,00	8,57
		Training opportunities	1	0,00	0,00	0,00	0,00	5,88	8,82	5,88	20,59
			2	2,94	0,00	2,94	2,94	5,88	5,88	2,94	23,53
			3	2,94	2,94	0,00	2,94	14,71	2,94	0,00	26,47
			4	0,00	2,94	0,00	0,00	8,82	0,00	0,00	11,76
			5	0,00	0,00	0,00	2,94	2,94	0,00	0,00	5,88
			n/a	0,00	0,00	0,00	2,94	2,94	5,88	0,00	11,76
4.	How do/did you gain entrepreneurship skills?	Graduation and post graduate education in entrepreneurial and business skills		0,00	0,00	1,22	1,22	6,10	2,44	1,22	12,20
		Informal personal networks		0,00	2,44	0,00	3,66	6,10	3,66	1,22	17,07
		Internships and on -site learning experiences or learning by doing		2,44	2,44	1,22	2,44	8,54	3,66	2,44	23,17
		Lifelong learning initiatives and training courses		1,22	0,00	0,00	1,22	2,44	1,22	1,22	7,32
		Advanced training in business management		1,22	0,00	0,00	1,22	1,22	2,44	0,00	6,10
		Private business courses		1,22	1,22	0,00	1,22	2,44	1,22	0,00	7,32
		Vocational training in design methods in service and product development		0,00	0,00	0,00	0,00	2,44	0,00	0,00	2,44
		Basic training in project co-ordination, team building and peer to peer networking		1,22	0,00	0,00	1,22	7,32	3,66	0,00	13,41
		Basic training in financial and business modelling		0,00	0,00	0,00	0,00	3,66	0,00	0,00	3,66
		Centres that support SMEs and entrepreneurship		0,00	0,00	0,00	0,00	4,88	0,00	0,00	4,88
		Other:		0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a		0,00	0,00	0,00	1,22	0,00	1,22	0,00	2,44

5.	Do you see a need for the development of advice and support centers specifically for the creative and cultural industries?	Not needed	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		Less needed	0,00	2,94	0,00	0,00	2,94	0,00	0,00	5,88
		Not needed or needed	0,00	2,94	0,00	0,00	2,94	0,00	0,00	5,88
		Quite needed	2,94	0,00	2,94	2,94	14,71	8,82	2,94	35,29
		Much needed	2,94	0,00	0,00	5,88	17,65	14,71	5,88	47,06
		No opinion	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94

D.2.6 Access to innovation

The most relevant sources of knowledge are the individual knowledge sharing with 32,10%, the open information sources with 24,69% and the cooperation with universities/ research with 17,28%.

As far as it concerns the research and innovation, participating companies stated that creativity and soft innovation (non-functional and functional) are the most predominant (56,41%), followed by technological innovation (17,95%) while the least predominant is the hidden innovation (2,56%).

The innovation activities that the enterprises were mostly engaged, were the training for innovation (23,08%), in-house R&D (21,54%), and acquisition of existing knowledge from other enterprises or organizations (15,38%). The percentage of engagement for the other innovation activities was: market introduction of innovations (12,31%), acquisition of machinery, equipment, software and buildings (10,77%) and external R&D (9,23%).

The aim behind the innovation activities mostly was to match users' demands (33,87%) and to gain efficiency in the production of service (22,58%), followed by aesthetical reasons (19,35%) and social improvements (16,13%), while the increase in competitiveness had low importance (1,61%).

Most of the companies had product innovation (64,71%) developed by the enterprise (41,18%), while a percentage of 11,26% was developed by the enterprise together with other organizations/ enterprises and by adapting or modifying goods or services originally developed by other enterprises or organizations. Whereas 23,53% of participating companies did not have product innovation and 11,76% did not answer.

The percentage of introducing a new or significantly improved product into the market, before the company's competitors with 44,12% followed by 20,59% introduced a new or improved product already introduced from competitors into the market, and a high percentage of participants did not answer (35,29%) did not answer this question. About the percentage of company's turnover used for innovation activities, the majority of the respondents (41,18%) did not answer or didn't know (11,76%), while 32,35% stated that they used 25% or more of the turnover.

Taking in account the concept of open innovation where CCIs can be drivers of creativity and innovation and can be recognized as an essential part of creativity on other sectors of economy, companies believe that it is necessary to be strengthened the links between CCIs and businesses in other sectors (42,50%) as well as the links between academia, knowledge institutes (22,50%) and it is necessary to make use of rapid communication (20%).

Table 25 – Access to innovation

Questions				Multiple Choices	Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
					Film, video, radio & TV %	Videogames & Sofware %	Music %	Books & Printing %	%	%	%	%
1.			In your business which of these digital services do you use?	E-commerce	0,00	1,02	0,00	0,00	5,10	2,04	0,00	8,16
				E-banking	1,02	2,04	1,02	2,04	9,18	5,10	1,02	21,43
				Electronic invoicing	0,00	2,04	0,00	2,04	3,06	1,02	0,00	8,16
				Teleworking	1,02	0,00	0,00	1,02	4,08	0,00	0,00	6,12
				Marketing tools	2,04	1,02	0,00	1,02	9,18	3,06	0,00	16,33
				E-gov services for the relations with the public administration	0,00	0,00	0,00	2,04	0,00	1,02	0,00	3,06
				Electronic certified mail/digital signature	0,00	1,02	1,02	3,06	4,08	3,06	1,02	13,27
				Security	1,02	0,00	0,00	2,04	2,04	1,02	1,02	7,14
				Disaster Recovery	1,02	1,02	0,00	1,02	4,08	3,06	2,04	12,24
				None	0,00	0,00	0,00	0,00	2,04	0,00	1,02	3,06
				Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				n/a	0,00	0,00	0,00	1,02	0,00	0,00	0,00	1,02
2.			For your organization what are the most relevant sources of knowledge?	Individual knowledge sharing	1,23	2,47	1,23	4,94	12,35	6,17	3,70	32,10
				Open information sources	2,47	1,23	1,23	3,70	7,41	6,17	2,47	24,69
				Closed-Paid information sources	0,00	0,00	0,00	0,00	3,70	1,23	0,00	4,94
				Cooperation with private actors	0,00	1,23	0,00	0,00	4,94	0,00	1,23	7,41
				Cooperation with sector associations	1,23	0,00	0,00	0,00	3,70	0,00	0,00	4,94
				Cooperation with public administration	0,00	0,00	0,00	0,00	2,47	2,47	0,00	4,94
				Cooperation with University/research	1,23	1,23	0,00	3,70	7,41	2,47	1,23	17,28
				None	0,00	0,00	0,00	0,00	1,23	0,00	0,00	1,23
				Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				n/a	0,00	0,00	0,00	0,00	0,00	2,47	0,00	2,47
3.			In your company what kind of research and innovation is predominant?	Scientific innovation	0,00	0,00	0,00	2,56	5,13	0,00	0,00	7,69
				Technological innovation	2,56	2,56	0,00	0,00	7,69	2,56	2,56	17,95
				Hidden innovation, such as innovation processes, new organizational models or new business models	0,00	0,00	0,00	0,00	2,56	0,00	0,00	2,56
				Creativity, and soft innovation (non-functional and functional)	5,13	2,56	2,56	5,13	17,95	17,95	5,13	56,41
				Design processes as drivers of user-centered innovation	2,56	0,00	0,00	0,00	5,13	0,00	0,00	7,69
				None	0,00	0,00	0,00	2,56	2,56	0,00	0,00	5,13
				n/a	0,00	0,00	0,00	0,00	0,00	2,56	0,00	2,56
	3.1		If so, did your enterprise engage in one or more innovation activities?	In-House R&D	0,00	1,54	0,00	3,08	10,77	3,08	3,08	21,54
				External R&D	0,00	1,54	0,00	1,54	3,08	1,54	1,54	9,23
				Acquisition of machinery, equipment, software and buildings	0,00	1,54	0,00	1,54	4,62	1,54	1,54	10,77
				Acquisition of existing knowledge from other enterprises or organizations	3,08	0,00	0,00	3,08	3,08	4,62	1,54	15,38
				Training for innovative activities	1,54	0,00	1,54	1,54	9,23	7,69	1,54	23,08
				Market introduction of innovations	1,54	3,08	0,00	1,54	1,54	3,08	1,54	12,31
				Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				Design of barter economy	0,00	0,00	0,00	0,00	1,54	0,00	0,00	1,54
				n/a	0,00	0,00	0,00	1,54	3,08	1,54	0,00	6,15
	3.2		What is the aim of your organization when innovating?	Innovating to gain eficiency in the production of a service	1,61	1,61	0,00	3,23	6,45	6,45	3,23	22,58
				Innovating to match user's demands	1,61	3,23	0,00	3,23	14,52	8,06	3,23	33,87
				Innovating for aesthetical reasons	1,61	3,23	0,00	0,00	9,68	3,23	1,61	19,35
				Innovating for social improvements	1,61	0,00	1,61	1,61	4,84	4,84	1,61	16,13
				Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				Increase in competitiveness	0,00	0,00	0,00	0,00	0,00	0,00	1,61	1,61
				protection of the environment and culture promotion	0,00	0,00	0,00	0,00	1,61	0,00	0,00	1,61
				n/a	0,00	0,00	0,00	1,61	1,61	1,61	0,00	4,84
	3.3		Have there been any product innovation (Goods or services)?	Yes	2,94	5,88	0,00	8,82	23,53	14,71	8,82	64,71
				No	2,94	0,00	2,94	0,00	8,82	8,82	0,00	23,53
				n/a	0,00	0,00	0,00	2,94	8,82	0,00	0,00	11,76
		3.3.1	If yes, who developed these product innovations?	Your enterprise by itself	2,94	2,94	0,00	2,94	17,65	11,76	2,94	41,18
				Your enterprise together with other enterprises or organizations	0,00	2,94	0,00	2,94	2,94	0,00	2,94	11,76
				Your enterprise by adapting or modifying goods or services originally developed by other enterprises or organizations	0,00	0,00	0,00	2,94	2,94	2,94	2,94	11,76
				Other enterprises or organizations	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				n/a	2,94	0,00	2,94	2,94	17,65	8,82	0,00	35,29
		3.3.2	It depended on?	Your enterprise introduced a new or significantly improved product into your market, before your competitors	2,94	2,94	0,00	5,88	11,76	14,71	5,88	44,12
				Your enterprise introduced a new or significantly improved product into your market, that was already available from your competitors in your market	0,00	2,94	0,00	2,94	11,76	0,00	2,94	20,59
				n/a	2,94	0,00	2,94	2,94	17,65	8,82	0,00	35,29
		3.3.3	What percent of your total turnover in one year used for innovation?	0 % to less than 1%	2,94	0,00	0,00	0,00	0,00	0,00	0,00	2,94
				1% to less than 5%	0,00	0,00	0,00	2,94	0,00	0,00	0,00	2,94
				5% to less than 10%	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
				10% to less 25%	0,00	2,94	0,00	0,00	0,00	0,00	2,94	5,88
				25% or more	0,00	2,94	0,00	5,88	11,76	11,76	0,00	32,35
				Do not know	0,00	0,00	0,00	0,00	8,82	0,00	2,94	11,76
				n/a	2,94	0,00	2,94	2,94	17,65	11,76	2,94	41,18

Questions		Multiple Choices	Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
			Film, video, radio & TV %	Videogames & Sofware %	Music %	Books & Printing %	%	%	%	%
4.	CCIs can themselves be drivers of creativity and innovation and could be recognized as an essential part of creativity on other sectors of the economy (indirect impact). For this concept of open innovation, do you think it is necessary:	To strengthen the links between academia, knowledge institutes	0,00	0,00	0,00	5,00	7,50	5,00	5,00	22,50
		To strengthen the links between CCIs and businesses in other sectors	2,50	2,50	2,50	2,50	17,50	12,50	2,50	42,50
		To make use of rapid communication	2,50	0,00	0,00	5,00	7,50	5,00	0,00	20,00
		To make use of digital convergence	0,00	5,00	0,00	5,00	0,00	0,00	0,00	10,00
		To resort to user-driven creation through interactive networks	0,00	0,00	0,00	2,50	2,50	0,00	0,00	5,00
		Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
		n/a	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
5.	Does your company creates an environment that encourages innovation?	The company does not develop specific initiatives aimed at promoting a company climate to encourage innovation	0,00	0,00	2,94	5,88	11,76	2,94	0,00	23,53
		The company has developed occasional initiatives aimed at promoting a business climate to encourage innovation	2,94	2,94	0,00	2,94	17,65	2,94	5,88	35,29
		The company encourages the generation of ideas for improvement and promotes innovation even if not structured.	0,00	0,00	0,00	0,00	2,94	5,88	0,00	8,82
		The company creates an environment conducive to the generation of ideas, also through collaboration (internal and external), the development of creativity and experimentation and recognizes the contribution of staff to innovation	2,94	2,94	0,00	2,94	5,88	11,76	0,00	26,47
		The company systematically develops a set of initiatives (internal and external), measures, incentives and awards to encourage the contribution of staff to innovation and the consequent results	0,00	0,00	0,00	0,00	2,94	0,00	0,00	2,94
		n/a	0,00	0,00	0,00	0,00	0,00	0,00	2,94	2,94

Finally, referring to if creation of an environment in the company able to encourage innovation, 35,29% of participants state that their company has developed occasional initiatives towards this aim and 26,47% create a conducive environment for generating ideas, also through collaboration (internal and external), the development of creativity and experimentation, and recognize the contribution of staff to innovation. While 23,53% does not develop specific initiatives.

D.2.7 Co-operation

This section analyses the ways that an enterprise cooperates with other networks and enterprises and the role of social media in their business. Starting with the role of networks, participating companies believe that networks allow people with different skills to work together and create new ideas (31,58%) and make possible the exchange of knowledge to strengthen the applied research of creative clusters (23,68%). A percentage of 18,42% participants believe that networks can promote the internationalization of SMEs, while 10,53% state that they can be a source of innovation through the exchange of good practices, 5,26% find networks as a reliable source of information and 5,26% believe that they can take advantage of mutually shared resources.

The survey showed that companies do cooperate with other enterprises. In particular, 37,14% cooperate with enterprises working in the same sectors and 34,29% with enterprises in different sectors, while 17,14% of the companies do not have any cooperation yet. The type of their cooperation is mostly based on non-formal agreements 47,06%, while only 26,47% of companies cooperate through formal agreements.

Regarding the kind of difficulties that exist in the design and operational process of the network, 25,45% of the companies answered that financial resources constitute a difficulty, then the identification of strategic objectives (18,18%) and the relations between potential participants in the network of companies (14,55%).

The participation of the companies to the network had both 'defensive' and 'offensive' impact (55,88%), while a percentage of 14,71% believe that they mostly had an 'offensive' impact.

The presence to social networks for almost all of the participating companies (91,18%) is considered fundamental, and this because a social network increases the visibility of company's brand and it gets used to increase collaboration between CCIs nationally and internationally, within similar sectors and across sectors (27,06%), it has a direct dialogue with users (22,35%) and increases sales of company's products/service (21,18%).

Most of the participating companies (38,24%) have contacted 1 to 3 institutions and/or associations and 26,47% have contacted more than 3 in the last five years. It is remarkable that 32,35% of companies did not come in such contact.

Table 26 – Co-operation

Questions			Multiple Choices	Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
				Film, video, radio & TV %	Videogames & Sofware %	Music %	Books & Printing %	%	%	%	%
1.		In your opinion networks can serve:	As a source of innovation through the exchange of good practices	0,00	0,00	0,00	5,26	2,63	2,63	0,00	10,53
			As a reliable source of information	0,00	2,63	0,00	0,00	0,00	2,63	0,00	5,26
			To take advantage of mutual shared resources	0,00	0,00	0,00	0,00	2,63	2,63	0,00	5.26
			As an exchange of knowledge to strengthen the applied research of creative clusters	0,00	2,63	0,00	7,89	10,53	0,00	2,63	23,68
			Allowing people with different skills to work together and create new ideas	0,00	0,00	2,63	0,00	21,05	7,89	0,00	31,58
			To promote the internationalization of SMEs	5,26	0,00	0,00	0,00	2,63	7,89	2,63	18,42
			Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			As an opportunith for any enterprise of the network economic growth	0,00	0,00	0,00	0,00	0,00	2,63	0,00	2,63
			n/a	0,00	0,00	0,00	0,00	0,00	0,00	2,63	2,63
2.		Does your enterprise cooperate (or plan to cooperate) with other enterprises?	Never	0,00	0,00	0,00	2,86	2,86	0,00	0,00	5,71
			Yes, with enterprises working in different sectors	2,86	2,86	0,00	5,71	14,29	8,57	0,00	34,29
			Yes, with enterprises working in the same sectors	2,86	2,86	2,86	5,71	14,29	8,57	0,00	37,14
			Not yet	0,00	0,00	0,00	0,00	8,57	2,86	5,71	17,14
			Do not know	0,00	0,00	0,00	0,00	0,00	2,86	2,86	5,71
	2.1	If so, what form of cooperations does your enterprise have?	Formal agreement	0,00	5,88	0,00	0,00	2,94	14,71	2,94	26,47
			Non-formal agreement	5,88	0,00	2,94	8,82	26,47	2,94	0,00	47,06
			n/a	0,00	0,00	0,00	2,94	11,76	5,88	5,88	26,47
	2.2	What kind of difficulties, if any, exist in the design and operational process of the network?	Finding organizations willing to join the network of companies	1,82	0,00	1,82	0,00	1,82	3,64	0,00	9,09
			Relations between potential participants in the network of companies	0,00	1,82	0,00	0,00	9,09	1,82	1,82	14,55
			Identification of strategic objectives	1,82	0,00	0,00	3,64	10,91	1,82	0,00	18,18
			Resources able to assist /guide in the planning and initial setting up phase	0,00	0,00	0,00	0,00	3,64	5,45	0,00	9,09
			Financial resources	3,64	3,64	1,82	1,82	10,91	3,64	0,00	25,45
			Involvement of the own structures	0,00	0,00	0,00	0,00	1,82	1,82	0,00	3,64
			No difficulties	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			Other	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			Finding places for business accomodation	0,00	0,00	0,00	1,82	0,00	0,00	0,00	1,82
			There is not a network yet	0,00	0,00	0,00	0,00	1,82	0,00	0,00	1,82
			n/a	0,00	0,00	0,00	1,82	7,27	3,64	3,64	16,36
	2.3	Participating to the network, have, 'defensive' motivation (e.g. to stay/to contain costs) or 'offensive' reason (e.g. innovation to penetrate on new markets), had any impact?	Mostly defensive	0,00	0,00	2,94	0,00	0,00	0,00	0,00	2,94
			Mostly offensive	0,00	2,94	0,00	0,00	8,82	2,94	0,00	14,71
			Both equally impactful	5,88	2,94	0,00	8,82	20,59	14,71	2,94	55,88
			n/a	0,00	0,00	0,00	2,94	11,76	5,88	5,88	26,47
3.		Do you consider your presence to Social Network to be fundamental?	Yes	5,88	2,94	2,94	11,76	38,24	20,59	8,82	91,18
			No	0,00	2,94	0,00	0,00	2,94	2,94	0,00	8,82
	3.1	If yes, why do you consider it useful to be present on social media?	Because everyone does it	0,00	1,18	0,00	0,00	1,18	0,00	0,00	2,35
			Because it increases the visibility of your brand	2,35	1,18	1,18	3,53	9,41	5,88	3,53	27,06
			Because it increases sales of our products/services	1,18	0,00	1,18	3,53	9,41	4,71	1,18	21,18
			Because it has a direct dialogue with users	1,18	1,18	0,00	3,53	9,41	5,88	1,18	22,35
			Because it gets used to increase collaboration between CCIs nationally and internationally, within similar sectors and across sectors	2,35	1,18	1,18	1,18	11,76	7,06	2,35	27,06
			Other:	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
			n/a	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00

Questions				Multiple Choices		Cultural Industries				Creative Industries	Performing Arts & Heritage	Sector Missing	Totals
						Film, video, radio & TV	Videogames & Sofware	Music	Books & Printing				
						%	%	%	%	%	%	%	%
4.	In the last five years how many public institutions and/or associations (universities, research and training centers) did the company come into contact?			None		2,94	0,00	0,00	2,94	17,65	8,82	0,00	32,35
				From 1 to 3		2,94	2,94	2,94	2,94	17,65	2,94	5,88	38,24
				More than 3		0,00	2,94	0,00	5,88	5,88	11,76	0,00	26,47
				n/a		0,00	0,00	0,00	0,00	0,00	0,00	2,94	2,94
5.	5.1		Do you see the need of public support for access to finance , access to the market , intellectual property rights, entrepreneurship education, skills and training and cooperation	Yes		5,88	5,88	2,94	11,76	32,35	20,59	5,88	85,29
				No		0,00	0,00	0,00	0,00	8,82	2,94	2,94	14,71
		5.1.1	If yes, in which phase and level do you see a need of public support for access to finance , access to market, IPR, entrepreneurship education, skills and training and cooperation?	Preparing the ground	Local	2,38	4,76	0,00	4,76	14,29	9,52	2,38	38,10
					Regional	2,38	0,00	0,00	0,00	2,38	2,38	0,00	7,14
					National	0,00	0,00	0,00	2,38	7,14	0,00	0,00	9,52
					European	0,00	0,00	0,00	2,38	4,76	2,38	0,00	9,52
					Sectoral	0,00	0,00	0,00	0,00	2,38	0,00	0,00	2,38
					International	0,00	0,00	0,00	2,38	4,76	0,00	0,00	7,14
					n/a	0,00	0,00	2,38	2,38	9,52	7,14	4,76	26,19
				Start-up	Local	4,26	0,00	0,00	6,38	8,51	6,38	2,13	27,66
					Regional	2,13	4,26	2,13	2,13	6,38	4,26	0,00	21,28
					National	2,13	0,00	0,00	0,00	6,38	4,26	2,13	14,89
					European	0,00	0,00	0,00	0,00	2,13	2,13	0,00	4,26
					Sectoral	0,00	0,00	0,00	0,00	6,38	2,13	0,00	8,51
					Organisation/association	0,00	0,00	0,00	0,00	2,13	0,00	0,00	2,13
					International	0,00	0,00	0,00	0,00	2,13	0,00	0,00	2,13
					n/a	0,00	0,00	0,00	0,00	12,77	4,26	2,13	19,15
				Build up	Local	1,75	0,00	0,00	5,26	3,51	3,51	0,00	14,04
					Regional	1,75	0,00	0,00	3,51	7,02	3,51	3,51	19,30
					National	1,75	3,51	0,00	3,51	7,02	3,51	0,00	19,30
					European	3,51	1,75	1,75	0,00	5,26	3,51	0,00	15,79
					Sectoral	1,75	0,00	0,00	0,00	5,26	0,00	0,00	7,02
					Organisation/association	0,00	0,00	0,00	0,00	1,75	0,00	0,00	1,75
					International	1,75	0,00	1,75	0,00	3,51	3,51	0,00	10,53
					n/a	0,00	0,00	0,00	0,00	7,02	3,51	1,75	12,28
				Build out	Local	1,85	0,00	0,00	5,56	3,70	1,85	0,00	12,96
					Regional	1,85	0,00	0,00	1,85	5,56	3,70	0,00	12,96
					National	3,70	0,00	1,85	1,85	12,96	1,85	1,85	24,07
					European	1,85	1,85	0,00	0,00	1,85	7,41	1,85	14,81
					Sectoral	3,70	1,85	0,00	0,00	3,70	1,85	0,00	11,11
					Organisation/association	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
					International	1,85	0,00	0,00	0,00	5,56	0,00	1,85	9,26
					n/a	0,00	0,00	0,00	0,00	9,26	3,70	1,85	14,81
				Connecting	Local	1,27	0,00	1,27	3,80	5,06	1,27	1,27	13,92
					Regional	1,27	0,00	0,00	2,53	2,53	1,27	0,00	7,59
					National	0,00	0,00	0,00	1,27	6,33	1,27	0,00	8,86
					European	1,27	0,00	0,00	2,53	8,86	6,33	1,27	20,25
					Sectoral	0,00	1,27	1,27	2,53	8,86	3,80	1,27	18,99
					International	2,53	2,53	0,00	2,53	11,39	3,80	1,27	24,05
					n/a	0,00	0,00	0,00	0,00	3,80	2,53	0,00	6,33
		5.1.2	Do you think it is useful to have advice, support and innovation in the various phases of company life on issues of access to finance, access to the market, etc.	Yes		5,88	5,88	2,94	11,76	38,24	20,59	8,82	94,12
				No		0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
				n/a		0,00	0,00	0,00	0,00	2,94	2,94	0,00	5,88
6.	For each phase of the life cycle which is/are the heading/s where you see the need for additional advice, support and information?			Preparing the ground	Access to finance	4,08	2,04	0,00	8,16	10,20	6,12	2,04	32,65
					Access to market	0,00	0,00	0,00	0,00	6,12	0,00	2,04	8,16
					IPR	2,04	0,00	0,00	0,00	8,16	0,00	2,04	12,24
					Entrepreneurship, education, skills and training	2,04	2,04	0,00	2,04	10,20	4,08	2,04	22,45
					Cooperation	0,00	2,04	2,04	0,00	6,12	0,00	4,08	14,29
					n/a	0,00	0,00	0,00	0,00	4,08	6,12	0,00	10,20
				Start-up	Access to finance	0,00	4,17	2,08	0,00	10,42	4,17	2,08	22,92
					Access to market	2,08	0,00	0,00	6,25	12,50	10,42	0,00	31,25
					IPR	2,08	0,00	0,00	2,08	4,17	4,17	2,08	14,58
					Entrepreneurship, education, skills and training	0,00	0,00	0,00	2,08	2,08	2,08	4,17	10,42
					Cooperation	2,08	2,08	0,00	0,00	6,25	0,00	2,08	12,50
					n/a	0,00	0,00	0,00	0,00	4,17	4,17	0,00	8,33
				Build-up	Access to finance	1,89	3,77	0,00	1,89	9,43	3,77	1,89	22,64
					Access to market	3,77	1,89	1,89	1,89	3,77	3,77	0,00	16,98
					IPR	0,00	0,00	0,00	1,89	1,89	0,00	0,00	3,77
					Entrepreneurship, education, skills and training	1,89	0,00	0,00	5,66	7,55	5,66	1,89	22,64
					Cooperation	1,89	1,89	0,00	1,89	16,98	1,89	0,00	24,53
					n/a	0,00	0,00	0,00	0,00	3,77	3,77	1,89	9,43
				Build out	Access to finance	0,00	2,38	0,00	0,00	9,52	2,38	0,00	14,29
					Access to market	2,38	4,76	0,00	0,00	4,76	4,76	7,14	23,81
					IPR	2,38	0,00	0,00	2,38	4,76	2,38	0,00	11,90
					Entrepreneurship, education, skills and training	2,38	0,00	2,38	0,00	11,90	0,00	0,00	16,67
					Cooperation	2,38	2,38	0,00	9,52	11,90	7,14	0,00	33,33
				Connecting	Access to finance	0,00	1,92	0,00	0,00	5,77	0,00	1,92	9,62
					Access to market	1,92	1,92	0,00	0,00	5,77	1,92	0,00	11,54
					IPR	0,00	0,00	1,92	1,92	5,77	1,92	0,00	11,54
					Entrepreneurship, education, skills and training	0,00	0,00	0,00	1,92	5,77	1,92	1,92	11,54
					Cooperation	3,85	3,85	0,00	7,69	17,31	11,54	1,92	46,15
					n/a	0,00	0,00	0,00	0,00	5,77	3,85	0,00	9,62

Companies believe that there is an imperative need for public support toward access to finance, access to the market, intellectual property rights, entrepreneurship education, skills and training and cooperation (85,29%).

This need at local level mostly is noticed in the phase of preparing the ground with 38,10% and start-up phase with 27,66%, at international level it is noticed the need for connecting with 24,05%, at national level, it is noticed in the phase of build-up phase with 19,30% which is also noticed at regional level in the same percentage, and build-out phase with 24,07%. The sectoral and European levels show a percentage of importance in the phases of connecting with 18,99% and 20,25% accordingly.

The majority of the companies think that it is useful to have advice support and innovation in the various phases of company life on issues of access to finance, access to the market, etc. in a percentage of 94,12%.

Finally, participants in each phase of the company's life cycle see the need for additional advice, support and information. In particular, in the phases of 'connecting', 'build-out', and 'build-up' there is a need for advice on cooperation 46,15%, 33,33% and 24,53% accordingly. In the phase of 'start-up' there is a need for advice on access to market with 31,25% and in the phase of 'preparing the ground' on entrepreneurship, education, skills and training with 22,45%.

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Appendix 1- Questionnaire

TRACES Project

Welcome and thank you for participating in our survey. The project "Transnational Accelerator for a cultural and creative ecosystem" is conducted by the Department of Management and Economics of the University of Salento in partnership with Creative Apulia Cluster Association, Tecnopolis Science and Technology Park Scrl, Hellenic Management Association, Chamber of Achaia, Encatc and Foundation for Ethical Finance. With this research we would like to obtain a reliable mapping of the Cultural and Creative Industries operating in Puglia and in Greece, of their main features and challenges which they face.
Thanks for your collaboration!

*Required

1. **Email address** *

____

2. **Name of entrerprise** *

____

3. **Legal representative of the company** *

____

4. **Legal structure of the company** *
Mark only one oval.

- ( ) Private company
- ( ) Limited Partnership (EE)
- ( ) General Partnership (OE)
- ( ) Limited Liability Company
- ( ) Private Capital Company (IKE)
- ( ) SA
- ( ) Association
- ( ) Koinsep

5. **Number of permanent employees** *

6. **Number of temporary employees** *

7. **Number of male employees** *

8. **Number of female employees** *

9. **Average level of employees education** *

10. **Main activity (NACE Code)** *

11. **Average of revenues in the last 5 years**

12. **Total assets**

13. **Date of company birth** *

Example: 15 December 2012

14. **Address** *

15. **Town** *

16. **Postal code** *

Information about who completes the questionnaire

available to contact if there are many problems or any queries about the form

17. **Name and Surname**

18. **Personal Phone number**

19. **Personal e-mail** *

____

Access to finance

20. **Does Your organisation make any financial and economic planning (budget and updated business plan)?** *
Mark only one oval.

- ( ) No *Skip to question 21.*
- ( ) Yes: 1 year forecast *Skip to question 20.*
- ( ) Yes: up to 3 years forecast *Skip to question 20.*
- ( ) Yes: up to 5 years forecast *Skip to question 20.*

Access to finance
Financial and economic planning

21. **Do you elaborate the forecast** *
Mark only one oval.

- ( ) By yourself
- ( ) Using professional consultancy
- ( ) Other: ________________________

Access to finance
Financial support

22. **Have you obtained a financial support since Your business has started?** *
Mark only one oval.

- ( ) Yes *Skip to question 22.*
- ( ) No *Skip to question 27.*

Access to finance
Financial support

23. **What type of funding did you receive?** *
Mark only one oval.

- ( ) Public *Skip to question 23.*
- ( ) Private *Skip to question 25.*
- ( ) Both, public and private *Skip to question 23.*

Access to finance
Public funding timing

24. **What were the timing of public funding?** *

Mark only one oval.

- Too long
- Long
- In the norm
- Short
- Well timed

25. **On average, what was the percentage of Your income coming from public contribution in the last financial year?** *

Mark only one oval.

- < 10%
- 10% - 30%
- 31% - 50%
- 51% - 70%
- 71% - 90%
- >90%

Access to finance

Financial support

26. **At what stage of the entrepreneurial lifecycle do you receive that financial support?** *

Mark only one oval.

- Start-up
- Build-up
- Build-out
- Connecting

27. **Did the financial support improve Your business with an increase in revenues?** *

Mark only one oval.

- Yes
- No
- I don’t know

Access to Finance

28. **What type of warranty do you usually use?** *

Mark only one oval.

- Personal guarantees
- Real estate guarantees
- Deposits
- Guarantee funds
- Discussion of the business plan (guarantees linked to the future profitability of a project)
- None

Access to Finance

29. **On average, what is the percentage of risk capital on Your total investment?** *
Mark only one oval.

- ( ) < 10%
- ( ) 10% - 30%
- ( ) 31% - 50%
- ( ) 51% - 70%
- ( ) 71% - 90%
- ( ) >90%

Access to finance

30. **What are the main obstacles for Your organisation to access finance?** *
You can choose at most 3 options
Tick all that apply.

- [ ] Risk aversion from financial institution
- [ ] Difficulty in getting grants
- [ ] Time consuming procedures for public incentives
- [ ] No bank loan guarantees
- [ ] Public fund shortage
- [ ] High interest rate
- [ ] Time spent before approval of financial support
- [ ] Absence of requirements for obtaining funding
- [ ] Other: ____________________

Access to finance

31. **What do you think is the most adequate tool to increase financial opportunities for Your company?** *
You can choose at most 3 options
Tick all that apply.

- [ ] Public grants
- [ ] Self-financing
- [ ] Bank loan
- [ ] Tax incentive
- [ ] Risk capital
- [ ] VAT Reduction for the CC products
- [ ] Donation/Sponsoring
- [ ] Micro Credit fund
- [ ] Private grants
- [ ] Innovation vouchers
- [ ] Seed financing
- [ ] Other: ____________________

Access to market

32. **Which were the most important business-related challenge when starting Your company?** *

You can choose at most 3 options
Tick all that apply.

- [ ] Lack of finance
- [ ] Limited knowledge of how to run a business
- [ ] High competition in the market
- [ ] Lack of knowledge about the market
- [ ] High tax burdens
- [ ] Lack of social security tailored to the needs of CCIs
- [ ] Cost of intellectual property rights
- [ ] Other: ____________________

Access to market

33. **What are the most relevant managerial factors that support the growth of Your organization?** *

You can choose at most 3 options
Tick all that apply.

- [ ] Leadership Skills
- [ ] Strategic Vision
- [ ] Marketing skills
- [ ] Communication Skills
- [ ] Problem Solving Skills
- [ ] Good Business Plans
- [ ] Administrative/financial Skills
- [ ] Management skills
- [ ] Ability to track investors
- [ ] Ability to access external business advices/support
- [ ] Creative Thinking
- [ ] Other: ____________________

Access to market

34. **What is the most relevant cost factors, which obstruct Your organization’s growth? Please rank them 1 (most relevant) to 5 (least relevant)** *

Tick all that apply.

	1	2	3	4	5
Cost of Labour	☐	☐	☐	☐	☐
Cost of Knowledge	☐	☐	☐	☐	☐
Scarce Access to Finance outside the firm	☐	☐	☐	☐	☐

Access to market

35. **What is the most important entry barriers for Your organization at the national level?** *
Mark only one oval.

- Price competition
- Access to knowledge
- Exclusive Agreement with Key Distributors
- Presence of strong brands
- Cost of production
- Lack of business mechanism
- Lack of entrepreneurial skills
- Other: ______________________

Access to market

36. **Does the company explore, identify, and select new opportunities and markets?** *
Mark only one oval.

- Opportunities and new markets are identified on an occasional basis
- We have the ability to identify new opportunities but a mechanism for their collection and selection is not defined.
- We have the ability to identify new opportunities and we have defined mechanisms for their collection and selection.
- We have a systematic and integrated process for harness opportunities; we anticipate market expectations by assuming leadership positions

Access to market

37. **Do you think that Your organization have a limited knowledge about market opportunities?** *
Mark only one oval.

- Yes *Skip to question 37.*
- No *Skip to question 38.*

Access to market

Market opportunities

38. **What do you think is the best way to reduce this gap?** *
Mark only one oval.

- Organisational improvement
- Knowledge marketplace
- Peer assist
- Technology upgrade
- Public support
- Other: ______________________

Access to market

39. **Does the company would take new internationalization initiatives in the future?** *
Mark only one oval.

- Yes
- No
- Don’t know

Access to market

40. **If the company is not present on foreign markets, indicate the reason:** *
Mark only one oval.

- Nature of the product
- Explicit company choice
- Difficulties in cultural or linguist approach
- Difficulty in identifying management on the spot
- Management and control difficulties
- No assistance from public agencies in charge
- Scarcity of infrastructures, difficulties in local connections
- Administrative/bureaucratic impediments
- Regulatory impediments
- Financial impediments
- Lack of protection of trademarks

Access to market

41. **Does the company develop the ICT/New Technologies?** *
Mark only one oval.

- The company makes limited use of IT resources
- The ICT business systems support the management of various internal processes with an adequate level of integration
- The ICT business systems support the management of various external processes with an adequate level of integration
- The ICT business systems support in an integrated manner all processes and decisions, strategic and operational, both internally and externally in relation to customers, suppliers and partners

Access to market

42. **Could government encourage and provide appropriate support to enable CCI SMEs to better access opportunities on the market?** *

You can choose at most 3 options

Tick all that apply.

- [ ] Support in incubators
- [ ] Seed finance
- [ ] Gaining a market position
- [ ] Public procurement (used to increasing the demand for specific innovative products and services)
- [ ] Lead Market Initiative (set to identify the new needs and new market for innovative products or services)
- [ ] Standardisation (setting up a playing field for innovators, accompanying the emergence of new markets and facilitating the spread of technology)
- [ ] Access to knowledge
- [ ] Other: ____________

IPR

43. **How many patents, trademarks, industrial designs and products of intellectual property do your enterprise have?** *

____

IPR

44. **How do you evaluate the effectiveness of national IPR (Intellectual Property Rights) legislation and policies?**

Mark only one oval.

- ( ) Ineffective
- ( ) Less effective
- ( ) Not ineffective or effective
- ( ) Quite effective
- ( ) Much effective
- ( ) I don’t know

IPR

45. **In Your view, how much important is that businesses understand how to protect their IP e.g. patents, trademarks, designs and copyright?**

Mark only one oval.

- ( ) Not important
- ( ) Less important
- ( ) Not unimportant or important
- ( ) Quite important
- ( ) Much important
- ( ) I don’t know

IPR

46. **Has Your company any of intellectual property rights?** *

Mark only one oval.

- Yes *Skip to question 46.*
- No *Skip to question 48.*
- Rather not answer *Skip to question 48.*
- I don't have any intellectual property *Skip to question 48.*
- I'm not aware of what an intellectual property is *Skip to question 48.*

IPR

47. **Has Your company protected any of its IP through the following rights?** *

You can choose at most 3 options

Tick all that apply.

- Patents
- Trade marks
- Designs
- Copyright
- Confidentiality agreements
- Open Access Licensing (e.g.: Creative Common)
- You don't own any IP
- You don't know what IP is
- Prefer not to say
- Other: ______________________

IPR

Protected works

48. **What are the protected works?** *

You can choose at most 3 options

Tick all that apply.

- Literary works
- Musical works
- Broadcasting rights
- Artwork
- Maps and technical drawings
- Photographic works
- Cinematographic works
- Computer Software
- Other: ______________________

IPR

49. **Have you ever received advice on intellectual property rights?** *
Mark only one oval.

- No
- Yes
- I don't know

IPR

50. **Strategically, as regards intellectual property (IP) do you highlight the need for:** *
Mark only one oval.

- Laws and services in order to curb the illegitimate reuse of somebody else's work
- Technologies to regulate and protect content with technological protection measures such as digital rights management (DRMs)
- Allowing greater accessibility in order to be able to share and freely access existing content as a means of unlocking the potential benefits that this can offer
- Improving knowledge
- No need

Entrepreneurship education, Skills and Training

51. **What are the most relevant entrepreneurial skills for Your organization? Please rank them from 1 (most relevant) to 5 (least relevant)** *
Tick all that apply.

	1	2	3	4	5
Leadership Skills					
Communication Skills					
Problem solving Skills					
Networking Skills					
Administrative/Financial Skills					
Readiness to take risk					
Marketing Skills					
Creative Thinking					
International Export Vision					

Entrepreneurship education, Skills and Training

52. **What are the most relevant sources of education and training for Your Organization?** *
You can choose at most 3 options
Tick all that apply.

- Universities/Educational Institutions
- Public research Institutes
- Private no-profit institutions
- Specialised Public/semi-public innovation support
- Consultancy Services
- Other: ____________________

Entrepreneurship education, Skills and Training

53. **From the following factors, please rank in order of importance the most relevant factors in supporting Your organization. Please rank them from 1 (most relevant) to 5 (least relevant)** *

Tick all that apply.

	1	2	3	4	5
Use of Technology	☐	☐	☐	☐	☐
Use of Design as a Business Strategy	☐	☐	☐	☐	☐
Support in Providing R&D	☐	☐	☐	☐	☐
Networking opportunities	☐	☐	☐	☐	☐
Business Advices	☐	☐	☐	☐	☐
Facilitating the exchange of knowledge within the CCIs between experienced and inexperienced CCIs	☐	☐	☐	☐	☐
Financial Access	☐	☐	☐	☐	☐
Training Opportunities	☐	☐	☐	☐	☐

Entrepreneurship education, Skills and Training

54. **How do/did you gain entrepreneurship skills?** *

You can choose 3 options

Tick all that apply.

- ☐ Graduation and post graduate education in entrepreneurial and business skills
- ☐ Informal personal networks
- ☐ Internships and on-site learning experiences or learning by doing
- ☐ Lifelong learning initiatives and training courses
- ☐ Advanced training in business management
- ☐ Private business courses
- ☐ Vocational training in design methods in service and product development
- ☐ Basic training in project co-ordination, team-building and peer to peer networking
- ☐ Basic training in financial and business modelling
- ☐ Centres that support SMEs and entrepreneurship
- ☐ Other: ____________________

Entrepreneurship education, Skills and Training

55. **Do you see a need for the development of advice and support centres specifically for the creative and cultural industries?** *

Mark only one oval.

- ◯ Not needed
- ◯ Less needed
- ◯ Not needed or needed
- ◯ Quite needed
- ◯ Much needed
- ◯ No opinion

Access to innovation

56. **In Your business, which of these digital services do you use?** *
You can choose at most 3 options
Tick all that apply.

- [ ] E-commerce
- [ ] E-banking
- [ ] Electronic invoicing
- [ ] Teleworking
- [ ] Marketing tools
- [ ] E-gov services for relations with the Public Administration
- [ ] Electronic certified mail/Digital Signature
- [ ] Security
- [ ] Disaster recovery
- [ ] None
- [ ] Other: ____________________

Access to innovation

57. **For Your organization, what are the most relevant sources of knowledge?** *
You can choose at most 3 options
Tick all that apply.

- [ ] Individual knowledge sharing
- [ ] Open Information Sources
- [ ] Closed/Paid information Sources
- [ ] Co-operation with private actors
- [ ] Co-operation with sector associations
- [ ] Co-operation with public administration
- [ ] Co-operation with university/research
- [ ] None
- [ ] Other: ____________________

Access to innovation

58. **In Your company what kind of research and innovation is predominant?** *
Mark only one oval.

- ( ) Scientific innovation *Skip to question 58.*
- ( ) Technological innovation *Skip to question 58.*
- ( ) Hidden innovation, such as innovative processes, new organisational models or new business models *Skip to question 58.*
- ( ) Creativity and soft innovation (non-functional (aesthetics) and functional) *Skip to question 58.*
- ( ) Design processes as drivers of user-centred innovation *Skip to question 58.*
- ( ) None *Skip to question 64.*

Access to innovation

59. **Did Your enterprise engage in one or more innovation activities?** *

You can choose at most 3 options
Tick all that apply.

- [ ] In-house R&D
- [ ] External R&D
- [ ] Acquisition of machinery, equipment, software & buildings
- [ ] Acquisition of existing knowledge from other enterprises or organisations
- [ ] Training for innovative activities
- [ ] Market introduction of innovations
- [ ] Other: ____________________

Access to innovation

60. **What is the aim of Your organization when innovating?** *

You can choose at most 3 options
Tick all that apply.

- [ ] Innovating to gain efficiency in the production of a service
- [ ] Innovating to match user's demands
- [ ] Innovating for aesthetical reasons
- [ ] Innovating for Social improvements
- [ ] Other: ____________________

Access to innovation

61. **Have there been any product innovation (goods or services)?** *

Mark only one oval.

- ( ) Yes *Skip to question 61.*
- ( ) No *Skip to question 64.*

Access to innovation

Developping innovation

62. **Who developed these product innovations?** *

Mark only one oval.

- ( ) Your enterprise by itself
- ( ) Your enterprise together with other enterprises or organisations
- ( ) Your enterprise by adapting or modifying goods or services originally developed by other enterprises or organisations
- ( ) Other enterprises or organisations
- ( ) Other: ____________________

63. **It depended on?** *
Mark only one oval.

- ◯ Your enterprise introduced a new or significantly improved product into Your market before Your competitors (it may have already been available in other markets)
- ◯ Your enterprise introduced a new or significantly improved product that was already available from Your competitors in Your market

64. **What percent of Your total turnover in one year about for innovation?** *
Mark only one oval.

- ◯ 0% to less than 1%
- ◯ 1% to less than 5%
- ◯ 5% to less than 10%
- ◯ 10% to less than 25%
- ◯ 25% or more
- ◯ Don’t know

Access to innovation

65. **CCIs can themselves be drivers of creativity and innovation and could be recognized as an essential part of creativity on other sectors of the economy (indirect impact). For this concept of open innovation, do you think it is necessary:** *
Mark only one oval.

- ◯ To Strengthen the links between academia, knowledge institutes
- ◯ To Strengthen the links between CCIs and businesses in other sectors
- ◯ To make use of rapid communication
- ◯ To make use of digital convergence
- ◯ To resort to user-driven creation through interactive networks
- ◯ Other: ____________________

Access to innovation

66. **Does your company create an environment that encourages innovation?** *
Mark only one oval.

- ◯ The company doesn’t develop specific initiatives aimed at promoting a company climate to encourage innovation
- ◯ The company has developed occasional initiatives aimed at promoting a business climate to encourage innovation
- ◯ The company encourages the generation of ideas for improvement and promotes innovation even if not structured
- ◯ The company creates an environment conducive to the generation of ideas, also through collaboration (internal and external), the development of creativity and experimentation and recognizes the contribution of staff to innovation
- ◯ The company systematically develops a set of initiatives (internal and external), measures, incentives and awards to encourage and encourage the contribution of staff to innovation and the consequent results

CO-OPERATION

67. **In your opinion, networks can serve:** *
Mark only one oval.

- As a source of innovation through the exchange of good practices
- As a reliable source of information
- To take advantage of mutual shared resources
- As an exchange of knowledge to strengthen the applied research of creative clusters
- Allowing people with different skills to work together and create new ideas
- To promote the internationalization of SMEs
- Other: ______________________

CO-OPERATION

68. **Does Your enterprise co-operate (or plan to co-operate) with other enterprises?** *
Mark only one oval.

- Never *Skip to question 71.*
- Yes, with enterprise working in different sectors *Skip to question 68.*
- Yes, with enterprise working in the same sectors *Skip to question 68.*
- Not yet *Skip to question 71.*
- Don’t know *Skip to question 71.*

CO-OPERATION

69. **What form of co-operations does Your enterprise have?** *
Mark only one oval.

- Formal Agreement
- Non Formal Agreement

70. **What kind of difficulties, if any, have You had in the design and operational process of the network?** *
You can choose at most 3 options
Tick all that apply.

- [ ] Finding organizations willing to join the network of companies
- [ ] Relations between potential participants in the network of companies
- [ ] Identification of strategic objectives
- [ ] Resources able to assist/guide in the planning and initial setting up phase
- [ ] Financial resources
- [ ] Involvement of the own structures
- [ ] No difficulties
- [ ] Other: ______________________

71. **Participating to the network, have, "defensive" motivation (e.g. to stay on market / to contain costs ...) or "offensive" reason (e.g. innovation, to penetrate on new markets ...), had any impact?** *

Mark only one oval.

- Mostly defensive
- Mostly offensive
- Both equally impactful

CO-OPERATION

72. **Do you consider Your presence on Social network to be fundamental?** *

Mark only one oval.

- Yes *Skip to question 72.*
- No *Skip to question 73.*

Social Network

73. **Why do you consider it useful to be present on social media?** *

You can choose at most 3 options

Tick all that apply.

- Because everyone does it
- Because it increases the visibility of Your brand
- Because it increases sales of our products/services
- Because it has a direct dialogue with users
- Because it gets used to increase collaboration between CCIs, nationally and internationally, within similar sectors and across sectors
- Other:

CO-OPERATION

74. **In the last 5 years, how many public institutions and/or associations (universities, research and training centres) did the company come into contact?**

Mark only one oval.

- None
- From 1 to 3
- More than 3

75. **Do you see the need of public support for access to finance, access to the market, intellectual property rights, entrepreneurship education, skills and training and cooperation?** *

Mark only one oval.

- Yes *Skip to question 75.*
- No *Skip to question 76.*

76. **In which phase and level do You see a need of public support for access to finance, access to market, IPR, entrepreneurship education, skills and training and co-operation?**
Tick all that apply.

	Preparing the Ground	Start up	Build-up	Build out	Connecting
Local					
Regional					
National					
European					
Sectoral Organisation/Association					
International					

77. **Do you think it is useful to have advice, support and information in the various phases of company life on issues of access to finance, access to the market, etc.?** *
Mark only one oval.

- Yes *Skip to question 77.*
- No *Skip to question 78.*

78. **For each phase of the life cycle [preparing the ground, start up etc.] which is/are the heading/s [access to finance, to market, etc.] where you see the need for additional advice, support and information?**
Tick all that apply.

	Access to finance	Access to market	IPR	Entrepreneurship education, skills and training	Co-operation
Preparing the Ground					
Start up					
Build-up					
Build out					
Connecting					

79. **In compliance with the European regulation on the protection of personal data, I hereby authorize you to use and process my personal details contained in this survey**
Mark only one oval.

- Authorize