# European input analysis on Ceramics Sector

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# INTRODUCTION

A complete up to date research on the art & craft ceramic sector in Europe does not exist and as well few European studies does exist at the moment.

In order to produce the present document, AEuCC had to decide which methodology to follow, set clear objectives and consider how to reach fast results.

The goal of the present work is to support and complete the data on the art and craft ceramic sector gathered by the CLAY project partners in their Regions:

- Regional Government of Umbria (Italy);
- Regional Development Agency South West Oltenia (Romania);
- Regional Council of South Ostrobothnia (Finland);
- CTCV: Technological center for Ceramics and Glass (Portugal);
- Association for the development and the promotion of the european ceramic center (France).

As the CLAY partners gathered information on the art and craft ceramic sector through local stakeholders groups, in order to collect relevant and, as much as possible, homogeneous data between their different territorial frameworks, AEuCC decided to proceed with the development of a questionnaire to submit to a restricted selection of stakeholders from a wide number of Countries.

To complete the sets of data gathered through the questionnaire, AEuCC used partial publications, or publications which are not specific for the art and craft ceramic sector, as for instance "*Measuring the Craft Economy*", a report on the craft business in the UK, supported by the Arts Council England, dated 2014.

# INITIAL HYPOTHESIS

Before starting the present research, from a brainstorming between representatives of the Countries original members of AEuCC (Italy, France, Spain and Romania), emerged the following information, that we considered as a basic starting point to verify and complete.

**Overview of number and dimension of businesses (companies, employees, turnover)**

As stated before, there is no documented and clear information about the art and craft ceramic market.
We need to make a premise: there are many ceramists in Europe, but in this research we should focus on the “regular handicrafts”, those with a VAT number and tax inscription, and avoid the “hobbyist” system.

In Italy it exists a study (D.Calamandrei - *La Ceramica artistica e tradizionale in Italia*, Franco Angeli, 2009) that collected and analyzed art and craft ceramic sector datas, producing some concrete results, related year 2006, such as:
- ceramics companies: 2.669 registered (estimated up between 3.000 and 4.000)
- number of employees: 9.447 (estimated between 10.000 and 12.000)
- average dimension of the companies (as employees): 3,54
- average turnover (per company): € 218.219,00
- average turnover (per employees): € 55.100,00
- total national turnover: no data available, estimated between 500 - 600 million €

Starting from these information, AEuCC members estimated, on year 2014, that, in the AEuCC area (Italy, France, Spain, Romania) the number of companies could be considered in between 10.000 and 15.000, the number of employees in between 35.000 and 50.000 and the turnover in between 2 and 2,5 billion euros.
As a guess, we can suppose, as pure extrapolation, that in the EU (28 countries) the numbers could be in between 5 to 7 times the AEuCC area.

The number and dimension of businesses, as well as other actors (for instance academic excellences, research centers etc.), depends on the different Countries: we estimate it to be very good in Italy and France, average in Spain, poor in Romania. In the Countries that are about to join AEuCC we can estimate it to be very good in Germany and Portugal, average in Poland and poor in Czech Republic.

**Segmentation (materials, temperature, functionality)**

There is no approved and recognized segmentation system in the art and craft ceramic sector, but according to the knowledge and experience of several experts from different Countries, a sector analysis should be basically segmented by several characteristics such as:

- materials (earthware, terraglia, terracotta, faience, gres, porcelain)
- temperatures (very low, low, high)
- functionality (popular, artistic and traditional, contemporary)

Certainly further characteristics could had been investigated (techniques, products and processes) and they will be considered, in the future, in a subsequent updated version of the present analysis.

The three characteristics investigated by the present analysis could be combined between them, depending by specific techniques, processes, and produce some clusters such as:

- **Popular** (terracotta, earthware, low and mid temperature - 960°C - 980°C - 1020°C): popular and functional objects (e.g. vases, bottles, plates etc.), sometimes with decoration, included cribs and azulejos
- **Traditional artistic** (faience, mid temperature 1020°C - 1080°C or porcelain, high temperature 1100°C - 1280°C): artistic decoration (XIV - XIX century style) such as Italian majolicas (Faenza, Deruta, Montelupo etc.) or porcelain (Limoges, Wedgewood, Rosenthal, Richard Ginori, Capodimonte, Zsolnay, etc.).
- **Contemporary** (mid and high temperatures: faience, gres, porcelain): both artistic and functional objects.

<u>It is extremely important to remark that the present analysis represents a starting point and an incentive to start a more structured research that could be approached, completed, updated, improved and implemented, in order to give rise to a professional, recognized and continuous system of analysis of the art and craft ceramic sector, useful for implementing development policies at European territorial level.</u>

**SWOT Analysis**

According to our knowledge and experience of the art and craft ceramic sector in the European area, the main strengths and weaknesses, opportunities and threats are as follows.

Strengths:

- high level of networking;
- high number of Countries.

Weaknesses:

- not enough time and resources for continuous relations;
- missing up to date action and research on innovation in the ceramic sector.

Opportunities:

- no limits in all the ceramic fields;
- open to extra EU Countries (e.g. China, Turkey);
- more EU projects (Horizon, ENIMED, Creative);
- relations with tiles/industrial sector.

Threats:

- participation crisis from some AEuCC Members (e.g. France).

# THE SURVEY AND THE QUESTIONNAIRE

## The panel of stakeholders interviewed

The present art and craft ceramic sector analysis had been approached and developed through a survey, directly addressed to a specific number of known stakeholders from the largest number of Countries and specifically 19 Countries, which of them 17 Countries from European Union:

- Austria
- Bulgaria
- Croatia
- Czech Republic
- Finland
- France
- Germany
- Hungary
- Italy
- Latvia and Lithuania
- Poland
- Portugal
- Romania
- Slovenia
- Spain
- Sweden

and 2 extra European Union Countries:

- Switzerland
- Turkey

**The list of questions**

The questionnaire, sent through a Google Form, showed 9 sections for total 16 questions:

Section 1: Introduction and collecting personal data
- Name, organization, role and contacts

Section 2: General Information
- How many art&craft ceramic companies are present in your country?
- How many people are employed in the art&craft ceramic sector in your country?
- What is the total national revenue of the art&craft ceramic sector in your country?

Section 3: Distribution by worker
- Which percentage of the art&craft ceramic companies in your country have?

Section 4: Relevant structures
- Are there other relevant structures in your country for the art&craft ceramic sector? For instance research centers, national museums, excellence centers?

Section 5: Techniques
- Which percentage is produced in your country, out of the total of art&craft ceramic production, of:

Section 6: Temperature
- Which percentage of ceramic art&craft production is made in a temperature:

Section 7: Functionality
- Which percentage of ceramic art and craft production in your country is:

Section 8: Networking, Innovation and Internationalization
- What is the estimated level of networking in art&craft ceramic in your country?
- What is the estimated level of innovation in art&craft ceramic in your country?
- What is the estimated level of internationalization in art&craft ceramic sector in your country?

Section 9: SWOT Analysis
- What are the strengths of the art&craft ceramic sector in your country?
- What are the weaknesses of the art&craft ceramic sector in your country?
- What are the opportunities of the art&craft ceramic sector in your country?
- What are the threats of the art&craft ceramic sector in your country?

**The list of responses**

We received 15 responses, from 13 countries, ordered by chronology, as following:

- Slovenia (Igor Bahor - Bahor Pottery Topolšica)
- Austria (Eva Fuertbauer – Director of the Association for the promotion of ceramic artists, Gmunden)
- Turkey-1 (Nevsehir Haci Bektas - Veli University)
- Turkey-2 (Sevim Cizer - West Anatolian Ceramics Research Center and Ceramics Department of Dokuz Eylul University)
- France (Charles Fillit - Charles Fillit Consultant, ex director AfCC *)
- Switzerland (Claudio Gianettoni - Vice presidente Aticrea, Craft Association)
- Czech Republic (Nikola Seko - President AczCC *)
- Germany (Monika Gass - Neue Keramik Magazine, International Academy of Ceramics – AIC Council member)
- Croatia-1 (Ivna Safundzic - President of Association Interinova, Association for the promotion of Ceramics)
- Portugal (Jose Luiz Almeida Silva - Executive director AptCVC *)
- Croatia-2 (Danijela Pičuljan – Ulupuh Association of Ceramists)
- Poland (Krzysztof Hewak - Chairman of the ApICC * and Anna Bober - Director of the Ceramics Museum in Bolesławiec)
- Finland (Miisa Pulkkinen - Ornamo Art and Design, Association of Craftsmen)
- Spain (Oriol Calvo Verges, director of Museu del Cantir, Argentona and director of AeCC *)
- Italy (Giuseppe Olmeti, coordinator of AiCC * and AEuCC *)

Missing replies from: Bulgaria, Hungary, Latvia and Lithuania, Romania, Sweden.

* Acronymous “AxCC” is for “Association of Cities of Ceramics” (x for the Country).

## THE RESULTS OF THE QUESTIONNAIRE

Taking into account that the analysis and the survey was realized in very short time (2 months included December season's holidays) and that the structure of the questionnaire and some questions, on one side, needed more time to be discussed and prepared in advance, on the other time was not correctly and completely well interpreted by the stakeholders addressed, we can consider that the massive number of replies are fully satisfactory and leave the possibility of a next edition of the analysis, better set and prepared.

Mainly for the explained reasons not all the tables are fully completed and sometimes the datas do not appear consistent with other datas of the same table, suggesting that the question had not been correctly formulated or understood.

We can consider that this analysis is absolutely brand new for the art and craft ceramic sector, so that, even if the results and the datas are not always and completely correct, we can consider in any case a good result and a first general compared analysis at European level.

Here following the results of the questionnaire (the answers are reported exactly as formulated by the respondents, with some exceptions, always pointed out).

### Section 1: Introduction and collecting personal data

Name, organization, role and contacts

The personal data (name, role and organization) of the answering stakeholders, is listed in the previous chapter.

**Section 2: General Information**

How many art & craft ceramic **companies** are present in your country ?
How many **people** are **employed** in the art & craft ceramic sector in your country ?
What is the total national **yearly revenue** of the art & craft ceramic sector in your country?

| COUNTRY | Companies | Employees | Yearly Revenue |
|---|---|---|---|
| Slovenia | 200 | 300 (*) | € 500.000 |
| Austria | 220 | 500 | N/A |
| Turkey | 1000 (*) | 250.000 (*) | US$ 200 million (*) |
| France | 2400 | 6000 | N/A |
| Switzerland | 120 | 160 | € 900.000 |
| Czech Republic | 300 (*) | 2.000 | N/A |
| Germany | N/A | N/A | N/A |
| Croatia | 350 (*) | 2.000 (*) | € 1 million |
| Portugal | 892 | 8.885 | € 335 million |
| Poland | 200 | 38.700 | € 22 million (*) |
| Finland | 50-100 | 200 | N/A |
| Spain | 2100 | 5900 | € 252 million |
| Italy | 2300 | 7000 | € 522 million |

The data marked with (*) was interpreted by the authors of the document.

The responses from Turkey and Croatia (2 for each Country), as well was interpreted by the authors and compacted to 1.

The responses sometimes appear to be not useful or not corrected, due to a misunderstanding in the interpretation of the questions or practical mistakes or bad interpretation and analysis of the sector.

Anyway a correlation is present between dimension of the single Country and its proper number of companies and so that the data are coherent, in relation to most of the Countries (France, Spain, Italy, Portugal, Croatia, Slovenia, Austria, Czech Rep., Finland, Poland.

Not so coherent and proportional is the number of employees or the revenue related to the companies, sometimes in line between Countries (once more France, Spain, Italy or small Countries), sometimes (Portugal) depending by the different dimension of the companies, sometimes (Turkey, Germany, Poland) not well explicable, but, as we mentioned in the introduction, is absolutely necessary a refinement of the questionnaire, for a next edition.

**Section 3: Distribution by worker**

How many art & craft ceramic companies are present in your country ?

| COUNTRY | 1 worker | 2 - 5 workers | 5 - 10 workers | More than 10 workers |
|---|---|---|---|---|
| Slovenia | 95% | 4% | 1% | 0% |
| Austria | 70% | 15% | 10% | 5% |
| Turkey | 40% | 30% | 20% | 10% |
| France | 30% | 60% | 8% | 2% |
| Switzerland | 95% | 4% | 1% | 0% |
| Czech Republic | 25% | 70% | 5% | 0% |
| Germany | 55% | 30% | 15% | 10% |
| Croatia | 80% | 15% | 3% | 2% |
| Portugal | 20% | 40% | 30% | 10% |
| Poland | 40% | 20% | 20% | 20% |
| Finland | N/A | N/A | N/A | N/A |
| Spain | 60% | 20% | 15% | 5% |
| Italy | 70% | 20% | 6% | 4% |

From the estimates that we received, the majority of ceramic business have only one worker, with the exception of France, Czech Republic and Portugal (where the majority of businesses have between 2 and 5 workers).

It is rare to find a ceramic business with more than 10 workers (Austria, Spain 5%; Turkey 10%; Germany 10%; Portugal 10%; Poland 20%).

**Section 4: Relevant structures**

Are there other relevant structures in your country for the art & craft ceramic sector? For instance research centers, national museums, excellence centers ?

| | |
|---|---|
| Slovenia | Yes |
| Austria | No |
| Turkey | There are many ceramic research centres, art and ceramic museums and exclusive art ceramics centres in our country. Two of them are located in Nevsehir Haci Bektas Veli University.<br>The first one is Nevsehir Haci Bektas Veli University Avanos Ceramic Application and Research Centre. The other is Ceramics-Painting-Sculpture-Original Printing Museum. Another is in Eskisehir city titled SAM and another one is in Izmir city located in Dokuz Eylul University (Baser) and Mimar Sinan University of Arts, Ceramics Research Centre in Istanbul. Even there are many National Archaeological, Ethnographic and Modern art museums and private museums including Ceramic Sections in our country. |
| France | Yes |
| Switzerland | Yes, ceramic museum and schools |
| Czech Rep. | Yes |
| Germany | About 15 museums, 10 Academies and Design Schools plus craft and art organisations.<br>Many start up companies and a growing group of people working together in mixing skills and material.<br>Expanding limiting borders of classic crafts and finding a new group of collectors or buyers. |
| Croatia | No research and excellence centers, yes national museums. |
| Portugal | Yes. Research centers and training centers. Museums also more than ten. |

| | |
|---|---|
| Poland | - AGH University of Science and Technology<br>- Eugeniusz Geppert Academy of Fine Arts in Wrocław<br>- The Academy of Fine Arts in Kraków<br>- Wrocław University of Science and Technology<br>- Warsaw University of Technology<br>- The Institute of Ceramics and Building Materials in Warszawa<br>- Silesian University of Technology in Gliwice<br>- Polish Association of Ceramic Municipalities<br>- Museum of Ceramics in Bolesławiec<br>- Museum of Porcelain in Wałbrzych<br>- Museum of Ceramic Techniques in Koło<br>- Museum of Kashubian Ceramics in Chmielno |
| Finland | The most important structures in this field are Design Museum in Helsinki, EMMA Museum in Espoo, Arabia Art Department Society, the Cooperative of Artisans, Designers and Artists in Fiskars ONOMA, Arctic Ceramic Center in Posio, Pentik factory and cultural center in Posio. |
| Spain | Museo Nacional de Ceramica y Artes Santuarias (Valencia), Innovarcilla Centro Tecnologico de la Ceramica (Bailen), Oficio y Arte (La Coruna), FAD Foment de les Arts I el Disseny (Barcelona), Fundesarte (Madrid), ITC Instituto de Tecnologia Ceramica (Castellon), Instituto de Ceramica y Vidrio (Madrid) |
| Italy | Many relevant structures are present in Italy: Research Centers: Istituto di Scienza e Tecnologia dei Materiali Ceramici (ISTEC) del Consiglio Nazionale delle ricerche (CNR) in Faenza, Laboratorio tecnologie dei materiali Faenza (TEMAF) hosted at ENEA, Centro Ceramico in Bologna, and the Laboratorio XTech di Ricerca sui materiali ceramici a Civita Castellana. More than 140 Museums with Ceramics collections are spread all over the Country (dedicated to ceramics or general art with ceramics section, excluded archeological), 35 of them in Cities of Ceramics of AiCC Association (the most important and well known is the MIC Museo Internazionale delle Ceramiche in Faenza). Ceramics schools are 55, 22 of them in AiCC Cities with the following excellences: Istituto Caselli in Napoli and ITS Corso Superiore ad Indirizzo Ceramico of Faenza. |

There are relevant structures for the art and craft ceramic sector (for instance research centers and museums), with the exception of Austria and Croatia, where there are no research centers, but there are national museums.

In particular, in Turkey there are many ceramic research centers, museums and exclusive art ceramic centers (e.g. Nevsehir Haci Bektas Veli University Avanos Ceramic Application and Research Centre and Ceramics-Painting-Sculpture-Original Printing Museum).

In Germany there are about 15 museums, 10 Academies and Design Schools plus craft and art organizations; many start-up companies and a growing group of people working together in mixing skills and material, expanding limiting borders of classic crafts and finding a new group of collectors or buyers.

In Portugal there are research centers and more than 10 museum. In Poland there are training centers (Academies, Universities) and museums.

In Finland, the main relevant structures are design museum, cooperative of artisans, arctic ceramic center.

In Spain and Italy there are research and education centers and museums spread at a wide territorial level, even if, obviously, centered on the areas of “ancient and established ceramics tradition.

**Section 5: Techniques**

Which percentage is produced in your country, out of the total of art and craft ceramic production, of:

| COUNTRY | Popular product | Majolica Faiance | Gres | Porcelain |
|---|---|---|---|---|
| Slovenia | 30% | 60% | 25% | 15% |
| Austria | 70% | 20% | 5% | 5% |
| Turkey | 80% | 13% | 2% | 5% |
| France | 10% | 40% | 30% | 20% |
| Switzerland | 2% | 70% | 10% | 20% |
| Czech Republic | 75% | 5% | 10% | 10% |
| Germany | 0% | 10% | 70% | 20% |
| Croatia | 70% | 25% | 5% | 0% |
| Portugal | 13% | 42% | 15% | 30% |
| Poland | 13% | 2% | 20% | 65% |
| Finland | 0% (*) | 10% (*) | 10 (*) | 80% (*) |
| Spain | 40% | 30% | 10% | 20% |
| Italy | 20% | 60% | 15% | 5% |

The data marked with (*) was interpreted by the authors of the document.

The responses from Turkey and Croatia (2 for each Country), as well was interpreted by the authors and compacted to 1.

Considering 4 basic techniques (popular products; majolica / faience; gres and porcelain), it resulted from the survey that:

- **Porcelain** is only produced in high percentage in Finland (estimated by the authors in 80%) and Poland (65%) out of total of art and craft ceramic production);

- **Gres** is highly produced only in Germany (70% out of total of art and craft ceramic production);

- **Majolica/Faience** is mainly produced in Italy (60% out of total of art and craft ceramic production), thanks to the highest historical, cultural and artistic tradition of this technique and Slovenia (60%), France (40%), Switzerland (70% out of total of art and craft ceramic production) and Portugal (42% out of total of art and craft ceramic production);

- **Popular product** is mainly produced in Austria (70% out of total of art and craft ceramic production), Turkey (80% out of total of art and craft ceramic production) and Croatia (70% out of total of art and craft ceramic production), and even in Spain, even with a lower percentage (40%) it represent the highest technique.

## Section 6: Temperature

Which percentage of ceramic art and craft production is made in a temperature:

| COUNTRY | lower than 1000 degrees | between 1000 - 1100 degrees | higher than 1100 degrees |
|---|---|---|---|
| Slovenia | 20% | 70% | 10% |
| Austria | 10% | 20% | 70% |
| Turkey | 30% (*) | 55% (*) | 15% (*) |
| France | 20% | 40% | 40% |
| Switzerland | 30% | 0% | 70% |
| Czech Republic | 10% | 70% | 20% |
| Germany | 10% | 20% | 70% |
| Croatia | 55% (*) | 40% (*) | 5% |
| Portugal | 15% | 45% | 40% |
| Poland | 13% | 2% | 85% |
| Finland | / | / | / |
| Spain | 45% | 35% | 20% |
| Italy | 5% | 85% | 10% |

The data marked with (*) was interpreted by the authors of the document.

The responses from Turkey and Croatia (2 for each Country), as well was interpreted by the authors and compacted to 1.

Only in a minority of Countries, ceramics is produced at low temperatures (**lower than 1000 degrees**), mainly in Croatia, estimated in 55% out of total of art and craft ceramic production and in Spain, declared for a 45%.

Italy (85% out of total of art and craft ceramic production), Slovenia (70%), Turkey (80%), Czech Republic (70%), Portugal (45%) mainly produce ceramic **between 1000 and 1100 degrees**.

Austria (70% out of total of art and craft ceramic production), Switzerland (70%) Germany (70%) and Poland (85%) mainly produce at a temperature **higher than 1100 degrees**.

In France there is 40% of the production between 1000 and 1100 degrees and 40% higher than 1100 degrees.

**Section 7: Functionality**

Which percentage of ceramic art and craft production in your country is:

| COUNTRY | Traditional | Functional (design) | Artistic |
|---|---|---|---|
| Slovenia | 20% | 70% | 10% |
| Austria | 70% | 10% | 20% |
| Turkey | 30% (*) | 55% (*) | 15% (*) |
| France | 30% | 30% | 40% |
| Switzerland | 20% | 10% | 70% |
| Czech Republic | 5% | 90% | 5% |
| Germany | 30% | 40% | 30% |
| Croatia | 75% (*) | 10% (*) | 15% (*) |
| Portugal | 20% | 40% | 40% |
| Poland | 65% | 30% | 5% |
| Finland | 15% | 70% | 15% |
| Spain | 40% | 35% | 25% |
| Italy | 40% | 30% | 30% |

The data marked with (*) was interpreted by the authors of the document.

The responses from Turkey and Croatia (2 for each Country), as well was interpreted by the authors and compacted to 1.

Considering Traditional ceramics, Functional (design) and Artistic ceramic, Austria (70% out of total of art and craft ceramic production), Croatia (75%) and Poland (65%) marked “**Traditional**” as the main percentage of ceramic production.

**Functional/Design** was marked as majoritary by Slovenia (70% out of total of art and craft ceramic production), Turkey (60%), Czech Republic (90%), and Finland (70%).

**Artistic** ceramic was market as majoritary by Switzerland (70% out of total of art and craft ceramic production).

Portugal marked equally important Functional and Artistic production (bot at 40%).

Very similar the situation for the biggest Countries (France, Germany, Spain and Italy), all of them very proportioned in the split between the three categories (France 30%-30%-40% out of total of art and craft ceramic production, so mostly artistic, Germany 30%-40%-30% so mostly functional, Spain 40%-35%-25%, Italy 40%-30%-30%, both mostly traditional), but for all of these Countries we can say that there is a very balanced result relating the functionality.

**Section 8: Networking, Innovation and Internationalization**

What is the estimated level of **networking** in art and craft ceramic sector in your country ?

| | |
|---|---|
| Slovenia | Low: mostly we have the Garage masters, they have no time. |
| Austria | Low: there is no official network in Austria at the moment. |
| Turkey | Medium: There are large-scale ceramics factories in Turkey. In addition to this, there are small and medium-sized enterprises and production centres. There are both home markets and overseas markets. From time to time, design, production and artistic competitions are organized in the ceramics industry. Collaboration is established with universities, connections are established in the field of artistic and industrial production, and internship opportunities are offered. There is no good connection between associations or federations in country. |
| France | Low: individual artist or craftsmen, some association but born in the 70's so not really dynamic today. a new generation is coming |
| Switzerland | Low: There is no list of ceramists, we have few trained ceramists still working. |
| Czech Rep. | Medium: It will be very interesting opportunity for some ceramists, the others will not care about any kind of such activities. |
| Germany | Other: They use mostly Email - some but not all have websites / only a few are „blogging" - selling by internet is rising - but not common. They start to use Instagram - nice photos - but are afraid of Facebook. Networking is done directly, in expositions and markets. There is much to do in Germany - even when CRAFT ORGANISATIONS offer help and teaching. The Germans are very conservative and our strict rules / law about sharing photos - using data we have getting always an allowance paper before you do something - signed and with the correct words - this does not help. |

| | |
|---|---|
| Croatia | Low:<br>(1) There is no tradition of networking, there are no clusters, generally at the level of state bodies little knowledge of the variety of the sector mentioned, the decorative and use ceramics industry is poorly developed, a large number of individual producers<br>(2) After the Second World War private companies as well as traditional crafts were undesirable because of the policy of ex Yugoslavia (communism). Slightly changing images, but the economic situation and also political, is not in favor of individuals |
| Portugal | Low: Each worker work alone. |
| Poland | Medium: Answering this question, we took under consideration following associations: Polish Porcelain Group, Polish Association of Ceramic Municipalities and Ceramics Fraternity in Bolesławiec. |
| Finland | High: Most part on artists and ceramists are members in Ornamo Art and Design Finland and also in many local art organisations and cooperatives. |
| Spain | Low: There is not a national organization of craft ceramic sector, only some regional Associations (as ACC in Cataluna) or local work. There is no organization as Confartigianato in Italy or Ateliers Art de France. Only Spanish Association of Cities of Ceramics (AeCC) which represent Municipalities and not craftsmen) works at national level. |
| Italy | High: there is an high level of networking for the craftsmen, due to the several national craft Associations, and particularly the 2 biggest (CNA and Confartigianato), that had a strong national organization, included “division” for craftsmen and in specific for ceramists. Not always the Association activities are focused to innovative results, maintaining predominantly a “trade union” role or providing accounting services. Very important is the AiCC, Association of Cities of Ceramics, both for its strong support, through the Cities, to the ceramists in all the country and because its origin, that depends by the existence of a national law (188/90) that “protect and promote artistic traditional ceramics”. |

The estimated level of networking between ceramic businesses is considered **Low** in Slovenia (due to a lack of time); Austria (as there is no official network); France (as the associations born in the 70s are not active nowadays); Switzerland; Croatia (where there are no clusters nor a tradition of networking) and Portugal (as each worker works alone).

A **Medium** networking was marked by Turkey (despite there is no good connection between associations, there are home and overseas markets, competitions and collaborations with universities); Poland (where there are quite many associations) and Czech Republic.

In Germany, networking is done face to face (websites and blogging are still developing). Strict rules and a conservative mentality do not help.

In Italy and Finland the level of networking is **High** as most part of artists and ceramists are members of very active craft national Associations and also of many local art organizations and cooperatives.

A very good experience has to be considered the network between the Cities of Ceramics (with the grouping at European level AEuCC and national experiences in Italy, Spain, France, Germany, Poland, Czech Rep. and Portugal).

<u>What is the estimated level of **innovation** in art and craft ceramic sector in your country ?</u>

| | |
|---|---|
| Slovenia | Medium: some people are creative in a way to explore |
| Austria | Low: no Innovation known |
| Turkey | Medium: In Turkey, there are ceramics departments in vocational schools, faculties of fine arts and educational institutions related to industrial design. Students are encouraged to be open to new ideas, and they are educated in technical and technological ways in artistic and sectoral terms. If evaluated on the basis of factory and workshop; production in our country is in communication at national and international level. |
| France | Low: from the technical point of view |
| Switzerland | Medium: There is research in the high artistic products. |
| Czech Rep. | Medium: It will be very interesting opportunity for some ceramists, the others will not care about any kind of such activities. |

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|---|---|
| Germany | High: good training  - and good chances to learn, but to get a job later is quite difficult.<br>Traditionally german teaching is precise , exact and  given in a  structured way - but that is not enough for the upcoming generations - rarely teaching in crafts is including digital options<br>We need younger teachers - with best education themselves - and they should NOT want to go for an  „ART Career“  too: their teaching is for the students only - they are paid for it. |
| Croatia | Low:<br>1) It is primarily an innovative design, there is no technological innovation<br>2) The reason for this is that in Croatia there is no institution of higher education in the field of ceramic art, there is also no research centers in the field of art |
| Portugal | Medium: Some innovations was introduced. |
| Poland | Medium:<br>- Implementing balanced development (non-waste production).<br>- Modern technologies implemented in coordination with research centers (AGH  University of Science and Technology in Kraków, Universities of Science and Technology in Wrocław, Warszawa and Gliwice, Institute of Ceramics and Building Materials in Warszawa).<br>- Modern design implemented in coordination with research centers (  The Academies of Fine Arts in Kraków and Wrocław).<br>- Cooperation with artist-designers from foreign countries, for example with designers from Milan. |
| Finland | Medium: We have information on craft artists working in public art who have been active in producing material innovations in the building sector but these cases still remain few. |
| Spain | Medium: In Spain traditional pottery has a very important role in ceramic sector and this part is not very used to introduce innovation, by other side, other producers and individual artists has innovated a lot. |

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| Italy | Low: Even if it is considered very important, there are not centres or activities dedicated to the innovation in this specific (art and craft) subsector rather more devoted to industry (tiles) or high innovation (materials, processes, etc.). A long time discussion is open regarding innovation depending by “craft & design” contamination and some projects had been developed. Unfortunately crafts Associations (CNA and Confartigianato) are not very proactive in this field. |

The estimated level of innovation was marked **Low** in Austria, in France (from the technical point of view) and Croatia (as there are no higher education and research centers in the field of ceramic) and even in Italy, a spite many positive other elements of excellence of the sector in the Country.

It was marked **Medium** in Slovenia (because of creative people); in Turkey (as students are encouraged to be open to new ideas); Switzerland (as there is research in the high artistic products); Portugal (where some innovations were introduced); Czech Republic; Poland (where modern technologies and design are being implemented in coordination with research centers, and there is cooperation with artist-designers from foreign countries), Finland (where there are a few cases of artists working in public art who have been active in producing material innovations in the building sector) and Spain (because craftsmen does not introduce it).

It was only marked **High** in Germany, as there are good trainings; however, there is a need for younger teachers.

What is the estimated level of **internationalization** in art and craft ceramic sector in your country ?

| | |
|---|---|
| Slovenia | Low: only may be 10-20 of them are selling international |
| Austria | Low: no internationalization known |
| Turkey | Medium: In Turkey, there are ceramics departments in vocational schools, faculties of fine arts and educational institutions related to industrial design. Students are encouraged to be open to new ideas, and they are educated in technical and technological ways in artistic and sectoral terms. If evaluated on the basis of factory and workshop; production in our country is in communication at national and international level. |

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| France | Medium: have you seen a lot of French craftsmen in the other markets? i marked medium because they are helped in this way (internationalization) by the great event "maison et objet" twice a year. really interesting for selling but also to develop contacts and partnership. This medium level is for art and craft sector. it's different in industrial sector. |
| Switzerland | Low: There are not economic conditions (costs of employees) nor dimensional to produce for foreign market. |
| Czech Rep. | Medium: Mainly for elders there will be a problem with the communication. Language barrier. |
| Germany | Medium: Germans have to accept that going abroad is part of the education - learning more than 2 languages should be part of studies in every school. It is not easy to get financial support when your parents don't have the money to send you in another country - grants and salaries are not enough - otherwise the student has to go for work and earn some dollars instead of taking the maximum of lessons at university or in school... |
| Croatia | Low: 1) internationalization has increased in the last few years through online sales<br>Medium: 2) Ceramic associations as well as museums dealing with this type of art have developed international cooperation for many years. International Ceramic Exhibitions are being organized (Ceramica Multiplex, ULUPUHs Exhibition), foreign artists are invited to doing workshops ... The artists themselves too, are connected to the outside world |
| Portugal | High: More than 80% exportation |
| Poland | High:<br>- Export-oriented production and expansion of production abroad.<br>- International promotion activities, for instance Ceramics Festival in Bolesławiec, exhibitions and presentations during international trade fairs, in museum facilities, presenting modern art. |
| Finland | High: Since the craft and visual art market in Finland is relatively small, most artists make international contacts to both show and sell their art. |

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| Spain | Medium: Similarly to the previous question, we find a traditional part of the sector that never go abroad to fairs or belong to international associations or sell abroad, but other enterprises and artists are used to go and sell abroad. |
| Italy | Medium: Even if this situation is absolutely not homogenous, with some craftsmen with a strong effort and other not involved at all. By sure the traditional lack of knowledge in a second language is a strong barrier, partially balanced by the open-mind, curiosity and sense of entrepreneuring. Strong progresses in the last years, due to the support of ARTEX (service company in Florence of CNA and Confartigianato) giving support to participation to fairs as “Maison&Objet” and AiCC, due to Argillà Italia and the cooperation with Argilla Aubagne or other markets (Gmunde, etc): just as exemple, on 2007 in Argilla Aubagne only one application from Italy, on 2015 more than 60 applications. |

The estimated level of Internationalization was marked **Low** in Slovenia (very few ceramists are selling abroad); in Austria; in Switzerland (as there are not economical nor dimensional conditions to produce for the foreign market).

It was marked **Medium** in Turkey; France (for the art and craft sector, especially thanks to the *Maison&objet* market, not industrial); Czech Republic (where the problem is also the linguistic barrier); Germany (it is needed to do experiences abroad and speak other languages), Croatia (where internationalization has increased in the last few years through online sales; ceramic associations as well as museums dealing with this type of art have developed international cooperation and International Ceramic Exhibitions are being organized), Spain and Italy (even if in these Countries similar situations are depending by, on one side, an historical lack of culture for this activity and on the other by a very positive attitude and curiosity to the internationalization, so with a general foresee of positive development in both Countries).

It was marked **High** in Portugal (with more than 80% exportation); Poland (where there are an export-oriented production and international promotion activities) and Finland (as the craft and visual art market in Finland is relatively small, most artists make international contacts to both show and sell their art).

**Section 9: SWOT Analysis**

What are the **strengths** of the art and craft ceramic sector in your country ?

| | |
|---|---|
| Slovenia | A lot of creative people |
| Austria | Tradition |
| Turkey | - To be rich in finding raw materials within the country.<br>- To have Bachelor's, Master's and doctoral programs<br>- To have factories<br>- To have small and medium-sized enterprises<br>- Pottery's important place in our country from past to present. |
| France | History, but not really used at all: in 2010 AfCC tried to sensibilize in the use of history as base to develop the future with the turning exhibition "allo la terre" taking in each region a piece of museum and asking people to produce their contemporary vision of it. |
| Switzerland | Research on new technologies |
| Czech Rep. | High quality of the craft |
| Germany | High quality - best materials were used - we have traditionally very good engineering to control the processes of the making - but art needs creativity and experiment and that means time and money have to be spent on a project or an art piece. In Germany it is also common to do all the work, all the single worksteps yourself! No helpers... Sometimes wife or husband are the helping hands. This is hard in crafts and Art - much easier a situation like in Asia, when you can manage to set up your „IDEA" with help in a short time... So I think to explore that situation in Jingdezhen or San Bao, in Fuping per example could help, and computer work / digital painting and constructing and printing will change a lot! |
| Croatia | A large number of creative individuals<br>The desire of the individual to succeed in their work |
| Portugal | Price, flexibility, tradition, diversity, professional skills for production, raw materials, quality, ceramic heritage, support organizations, |

| | |
|---|---|
| Poland | - Modern technological lines in factories.<br>- High level of export.<br>- International prestige of the sector.<br>- Using national resources and technologies.<br>- Intensive cooperation between designers and industry.<br>- High level of products functionality. |
| Finland | Strong tradition, grants and residencies provided by foundations and the state |
| Spain | Good craftsmen, diversity of techniques, high level artists, long tradition and history. |
| Italy | - Cultural and historical tradition in the ceramics sector since XV century.<br>- High technical knowledge of old craftsmen.<br>- The national network system, |

What are the **weaknesses** of the art and craft ceramic sector in your country ?

| | |
|---|---|
| Slovenia | not connected to any institution, lack of marketing knowledge |
| Austria | no international network |
| Turkey | Low number and production of porcelain kilns throughout the country. Low number of educated and experienced personnel in factories and studios throughout the country. |
| France | People are individually good in technics but poor in research, development, administrative and marketing |
| Switzerland | Repetitiveness due to tourism requests |
| Czech Rep. | N/A |
| Germany | Sticking to old ways of production - plus fear of change - not taking the chances!!! An the big and awful mess with administration with 1 million rules and laws to respect... |

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|---|---|
| Croatia | The size of the internal market and small cash opportunities for the deployment of new technologies.<br>There is no higher level of education at the art academies for ceramics |
| Portugal | Less innovation, poor marketing, visibility in the international market, don't have networks in the international market, energy costs, designer conception outside of the country |
| Poland | - No facilities on vocational school level.<br>- No system protection on intellectual value and copyrights.<br>- No coherent promotion activities on a state level.<br>- No system support of the sector on a state level.<br>- Low salaries of average workers and high turnover of staff. |
| Finland | Very small market for craft and art, few galleries and museums in this field |
| Spain | Low level of networking and education, no good strategies on marketing, low level of internationalization and low level of innovation (new design, new technologies, etc.) of part of the sector. |
| Italy | - High level of bureaucracy and of taxes.<br>- Lack of strategy at Country level (internationalization, research and innovation for craft sector).<br>- Great mistake in the last education national reform that almost abolish at all the laboratories training in art school converting all of them in "design schools".<br>- Low level of innovation and development in the art and craft educational national system. |

What are the **opportunities** of the art and craft ceramic sector in your country ?

| | |
|---|---|
| Slovenia | To connect to institutions, like tourism and develop products |
| Austria | More network |
| Turkey | To be open to development |

| | |
|---|---|
| France | This should have been AFCC but.... today a really few municipality have the "good size" to employ a "good" technician dedicated; the size of the villages is to small and when one of them has a good idea and the capacity to develop it; it keep it for itself and don't want to disseminate. |
| Switzerland | Define a common brand to promote visibility and value |
| Czech Rep. | N/A |
| Germany | To accept the change - take the new times and go by digital helping tools... and on the other hand to continue and produce craft in serious and elegant way. And to do art with strong history feelings and a political and ethical message ... |
| Croatia | 1) Tourism, internet connection<br>2) Weak development opportunities. everything rests and depends on the individual |
| Portugal | Prices, flexibility, nearly presence in the european and north America markets, links with the international networks of selling |
| Poland | - Innovation and new technologies development.<br>- Establishing model solutions regarding marketing, promotion and intellectual value protection on the basis of international cooperation network.<br>- Intensification of activities leading to use external sources of funding. |
| Finland | Growing interest in public art |
| Spain | Tourism (national and international) that become a good client for art and craft ceramists, new generation that become fans and collectors of ceramics, young ceramists have a good level of education in arts and in managing crafts enterprises, incorporating innovations and new designs. Also new technologies can give to ceramic artists more opportunities to promote their workshops. |

| | |
|---|---|
| Italy | - The high Italian level in fashion and design enterprise and connections with handcraft<br>- The "Italian sound" (or "made in Italy")<br>- Better development of national tourism with craft business perspectives<br>- Back to the origin of "craft culture" as a lifestyle and production identity<br>- Handcraft meets new technologies<br>- Better knowledge of international markets and needs<br>- Development of digital markets<br>- Increasing of high temperature production (gres and porcelain)<br>- Development of relations (cultural, education, handcraft) with Chinese art and craft ceramic sector (back to the "ceramic road") |

What are the **threats** of the art and craft ceramic sector in your country ?

| | |
|---|---|
| Slovenia | To be DEAD, soon |
| Austria | There is too less youth in this profession |
| Turkey | 1) Export products from foreign countries<br>2) To be Import some extra raw materials for production and also cheaper products from foreign countries. |
| France | The abandonment of the sector by the municipalities<br>The isolation of young craftsmen<br>The poor number of "good" ceramic education center |
| Switzerland | Loss of local identity |
| Czech Rep. | Disinterest of young generation to work in art and craft ceramics. |

| | |
|---|---|
| Germany | Money goes to other projects. Even the sponsored Euro for ART PIECES are often spent for KITSCH - the jurors are often from ministerium and administration - real competition is not so established. we need dedicated teachers - and politicians with an idea and a proper training what ART or craft is at its best... „Intangible Heritage" should be a much honored procedere - And the publicity of ART & CRAFT has to be much more in the daily NEWS - we lost so much time to change for a better art and craft education - music and gardening should be teached in school - and not forgotten to the advantage of money making and jurisdiction... We should without compromising open up internationally and NOT close down nationally. |
| Croatia | 1) aging of existing ceramics, young people turn to new vocations and traditional crafts are slowly closing<br>2) very few artists and craftsmen in Croatia can live from their work. There is a possibility of dying this branch of the economy |
| Portugal | Western competition, Brexit, Trump strategies, environment european strategies, lower wages, |
| Poland | - Rising gas and resources prices.<br>- High level of pollutant emissions.<br>- Competition from eastern producers.<br>- Growing problem of lack of qualified staff. |
| Finland | Cuts in school providing education in this field |
| Spain | Importation of cheap products from other Countries (Asia, etc.), great supermarkets rarely buy to local producers, difficult to compete in the global market for small and local producers, low cost flights companies difficult a lot to transport ceramic works of tourists, small shops of ceramics are disappearing from our cities. |
| Italy | - General European and national crisis<br>- Few students or young workers of new generation wants become craftsmen, rather than designers or artists, without handicraft knowledge or experience<br>- Fast digital developments (business on line, new markets, new technologies) and consequent lack of capacity of ceramists to be updated |

**Summary of SWOT Analysis**

Here following a summary of the main of the S.W.O.T. characteristics.

The main **strengths** are:

- Slovenia, creative people;
- Austria, tradition;
- Turkey, raw materials, good trainings, factories but also small and medium sized businesses;
- France, history (which is not used, however);
- Switzerland (research on new technologies);
- Czech Republic (high quality of the craft);
- Germany, high quality and good materials, good engineering to control the processes;
- Croatia, the desire of the individual to succeed in their work;
- Portugal, price, flexibility, tradition, diversity, professional skills for production, raw materials, quality, ceramic heritage, support organizations;
- Poland, modern technological lines in factories, high level of export, international prestige of the sector, national resources and technologies, intensive cooperation between designers and industry;
- Finland, strong tradition, grants and residencies provided by foundations and the state;
- Spain, quality of national handicraft, techniques, artistic level, tradition, history
- Italy: historical tradition, knowledge of the craftsmen, the network system.

The main **weaknesses** are:

- Slovenia, lack of connection with the institutions and lack of marketing knowledge;
- Austria, missing an international network;
- Turkey, lack of porcelain kilns and of experienced employees in factories;
- France, weak in research, development, administration and marketing;
- Switzerland, repetitiveness due to tourism requests;
- Germany, old ways of production, fear of change;
- Croatia, small cash opportunities for the deployment of new technologies and no higher level of education at the art academies for ceramics;
- Portugal, less innovation and poor marketing, lack of networks in the international market, energy costs;
- Poland, no facilities on vocational school level, no system protection on intellectual value and copyrights, no coherent promotion activities on a state level, low salaries of average workers and high turnover of staff;
- Finland, very small market for craft and art, few galleries and museums in this field;
- Spain: low networking, education, marketing strategies, internationalization and innovation
- Italy: bureaucracy, taxes, lack of national strategies (poor internationalization, research, innovation), lack of laboratories and innovation in art schools.

The main **opportunities** are:

- Slovenia, to connect to institutions and tourism;
- Austria, more network;
- Turkey, to be open to development;
- France, more network;
- Switzerland, define a common brand to promote visibility and value;
- Germany, to accept the change, digital tools and on the other hand to continue and produce craft in serious and elegant way;
- Croatia, tourism and internet connection;
- Portugal, nearly presence in the european and north america markets, links with the international networks of selling;
- Poland, innovation and new technologies development, establishing model solutions regarding marketing, promotion and intellectual value protection on the basis of international cooperation network, intensification of activities leading to use external sources of funding;
- Finland, growing interest in public art;
- Spain: tourism, young generation (both consumer and ceramists), technologies,
- Italy: fashion and design, the “Italian sound” and “made in Italy”, tourism, craft culture lifestyle, technologies, international and digital markets, ceramics high temperature, relations with China.

The main **threats** are:

- Austria, lack of youth;
- Turkey, importing cheaper products from foreign countries;
- France, abandonment of the sector by municipalities, isolation of young craftsmen, poor number of educational centers;
- Switzerland, loss of local identity;
- Czech Republic, disinterest of young generation to work in art and craft ceramics;
- Germany, money goes to other projects, national closure, lack of publicity in the news;
- Croatia, aging of existing ceramics, young people turn to new vocations and traditional crafts are slowly closing, very few artists and craftsmen in Croatia can live from their work;
- Portugal, Brexit, Trump strategies, environment european strategies, lower wages;
- Poland, rising gas and resources prices, high level of pollutant emissions, competition from eastern producers, lack of qualified staff;
- Finland, cuts in school providing education in this field;
- Spain: China, globalization, low cost flight companies;
- Italy: general crisis, few attraction for handicraft jobs, fast digital development and lack of updating.

## CONCLUSIONS

**Here some conclusions by the authors, but with the request to each of the Partners of the CLAY Interreg Europe project and to the Stakeholders that participated to this survey, to write at least one sentence (or even more than one) as her/his proper comment related the Art and Craft Ceramic Sector.**

1) The Art and Craft Ceramic Sector (here following ACCS) is a very important heritage of single Country, European and worldwide culture, handicraft and economy.
2) ACCS is in crisis since many years and looks like it is going to die and disappear continuously, but it continuously revives, like the phoenix, if not from its ashes, at least from a strong dose of pessimism.
3) This survey started with a general hypothesis, born by summary brainstorming and was developed without a strong scientific base, but reached (at least according to the author's opinion) a satisfactory level of general view.
   (follow at next point…)
4) This survey has mainly created a general vision and approach to the ACCS, that deserves to be maintained, improved, corrected, integrated and above all, in a new version, re-tested to give rise to a better, more complete and reliable result.
   (follow at next point…)
5) The survey result could be tested with a two-yearly frequency, in order to produce a continuous and professional "sector analysis study".
6) I KINDLY ASK EACH CLAY PROJECT PARTNER AND EACH STAKEHOLDER INVOLVED IN CERAMICS TO LEAVE A COMMENT REGARDING THE ART & CRAFT CERAMIC SECTOR, WRITING TO:

   giuseppe.olmeti@romagnafaentina.it
   (with subject: comment to the survey)

   NO PROBLEM ABOUT THE LANGUAGE (IT WILL BE "GOOGLE TRANSLATED).

**THANK YOU VERY MUCH**
**FOR YOUR ATTENTION AND COLLABORATION**
**FROM THE AUTHORS**