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Black Sea CROSS BORDER COOPERATION

BSB831/HERiPRENEURSHIP "Establishing long-lasting partnerships to upgrade heritage-based offers and create new investment opportunities in tourism and the cultural and creative industries

2023

THE QUALIFICATIONS BLUEPRINT FOR THE CULTURAL AND CREATIVE INDUSTRIES IN THE BLACK SEA BASIN

Establishing long-lasting partnerships for the sustainable management and operation of UNESCO heritage corridor in the Black Sea Basin (07.2020 - 06.2023)

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Common borders. Common solutions.

CROSS BORDER COOPERATION

The Black Sea Programme is co-financed by the European Union through the European Neighbourhood and Partnership Instrument

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EXECUTIVE SUMMARY

Cultural and creative industries (CCIs) play an important role in fostering economic growth, job creation and innovation but are still poorly valued in their economic impact. This is partially due to the lack of strong key competences and the weakness of local ecosystems.

This report identifies the main characteristics of the cultural and creative sector in the project area countries, assesses the demand in the Qualification System for Cultural and Creative Industries, identifies the supporting functions for market system development, and highlights the models for cooperation in PA countries.

The BLUEPRINT on the Cultural and Creative Industries (CCI) provides labour market information for sector employers and other strategic stakeholders to use in strategic planning and communication of occupational needs. The BLUEPRINT assesses the skills supply and demand, analyses the demand-led qualifications, and determines the core skills needed in the cultural and creative industries in the Project Area countries.

The BLUEPRINT aims to inspire new kinds of joint offerings aiming to increase the critical mass for CCI involvement in cultural tourism and service design. Acknowledging the fact that a different approach is needed to draw the interest of young people towards heritage, the report is tailored to capture the skills of the young people currently engaged in CCI and reveal actual opportunities for professional development in this area.

The CCI actors should understand the importance of this system and adopt strategic actions to ensure the supporting functions for market system development.

This Blueprint aims to build a deeper comprehension of the CCI economic value through the inspiring model The Tree of Culture. The ultimate goal is to motivate the CCI market actors to adopt new behaviours that collectively will lead to better participation and cooperation in the PA countries' CCI system. These changes may develop new place-driven cultural heritage products and lead to the creation of synergies in the tourism industry.

PROJECT BACKGROUND

The economic contribution of CCI in the EU **(2.1%), is higher than the one of food/ beverages/tobacco (1.9%) or textile (0.5%).** There is notable demand for digital-savvy culture professionals within the networked economy.

This Blueprint aims to provide labour market information on the CCI for sector employers to use in strategic planning and communication of occupational needs. The Cultural and Creative Industries (CCI) have a key affinity to cultural tourism and therefore **HERiPRENEURSHIP** is pioneering a cross-sectoral perspective approach. The Blueprint investigates ways of cooperation, the supply and demand of skills, and inspires new kinds of joint offerings. Thereby, the increasing the visibility of the region will lead to the creation of the Black Sea Basin CCI Cluster, as well as to new physical and digital platforms, and will foster the cooperation between culture and tourism, leading to new products and services.

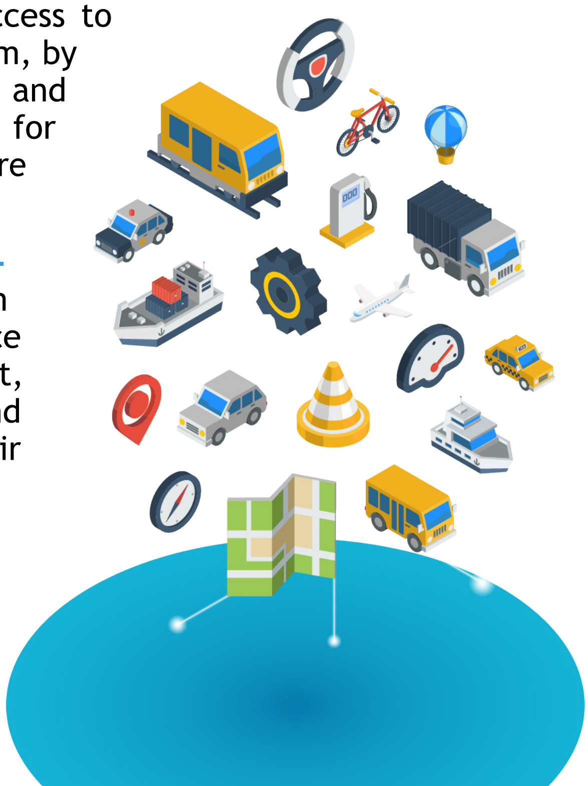
The Blueprint focuses on the following strategic objectives:

- **Increasing employer awareness** of access to and confidence in the qualifications system, by ensuring the availability of qualifications and other training opportunities that are fit for purpose and responsive to current and future industry needs;

- **Supporting the shift from a supply-led** to a demand-led qualifications system by ensuring employers can influence qualification design and development, and are aware of their own needs and responsibilities with regard to training their workforce;

- **Working with stakeholders** to support a process of rationalisation which inspires confidence in the qualifications system and supports increased demand for qualifications and training;

- **Ensuring qualifications** that support entry to employment, progression within employment, and progression to further learning and training are clearly signposted.



The BLUEPRINT refers to the countries within the Project Area and include Moldova, Romania, Bulgaria, Greece, Turkey, and Georgia. Project Area countries are located in the Black Sea Basin and are conceptually united by tangible and intangible UNESCO heritage.

STUDY METHODOLOGY

The research employed both quantitative and qualitative research methods. The consultants used the following methodologies: desk review, library research, internet research, key informant interviews, and review of good practices.

The consultants applied the following methods:

- Document study/Desk research: the HERiPRENEURSHIP project is documented, it has a detailed Project Documentation and a list of reports, sector strategies referred to the Project Assignment. A list of the consulted documents is presented in References;

- Project Area Partners' contribution: The Project Area Partners have provided relevant studies and specific information about the CCI sector in their countries. Business Development Capital and Local Partner ANTRIM has access to national/local resources regarding the CCI market actors.

- In-depth interviews with selected External Experts to identify the needs of qualifications in cultural and creative industries. The project team recommended the industry leaders from their country/region to contribute informationally to the researched subjects.

The consultants developed this report through an extensive analysis of the existing CCI sectors in PA countries applying a market systems lens, looking into the available materials and information provided by stakeholders from CCI sectors with the focus on the qualifications system by ensuring high responsiveness to current and future industry needs. The consultants used extrapolation methodology to study the CCI profile of PA countries and use the specific insights to develop a realistic estimation to approach an innovative cooperation model aiming to create sustainable growth.

Hence, the identification of recommendations is consistent with the concept of the Market System Development (MSD) approach.

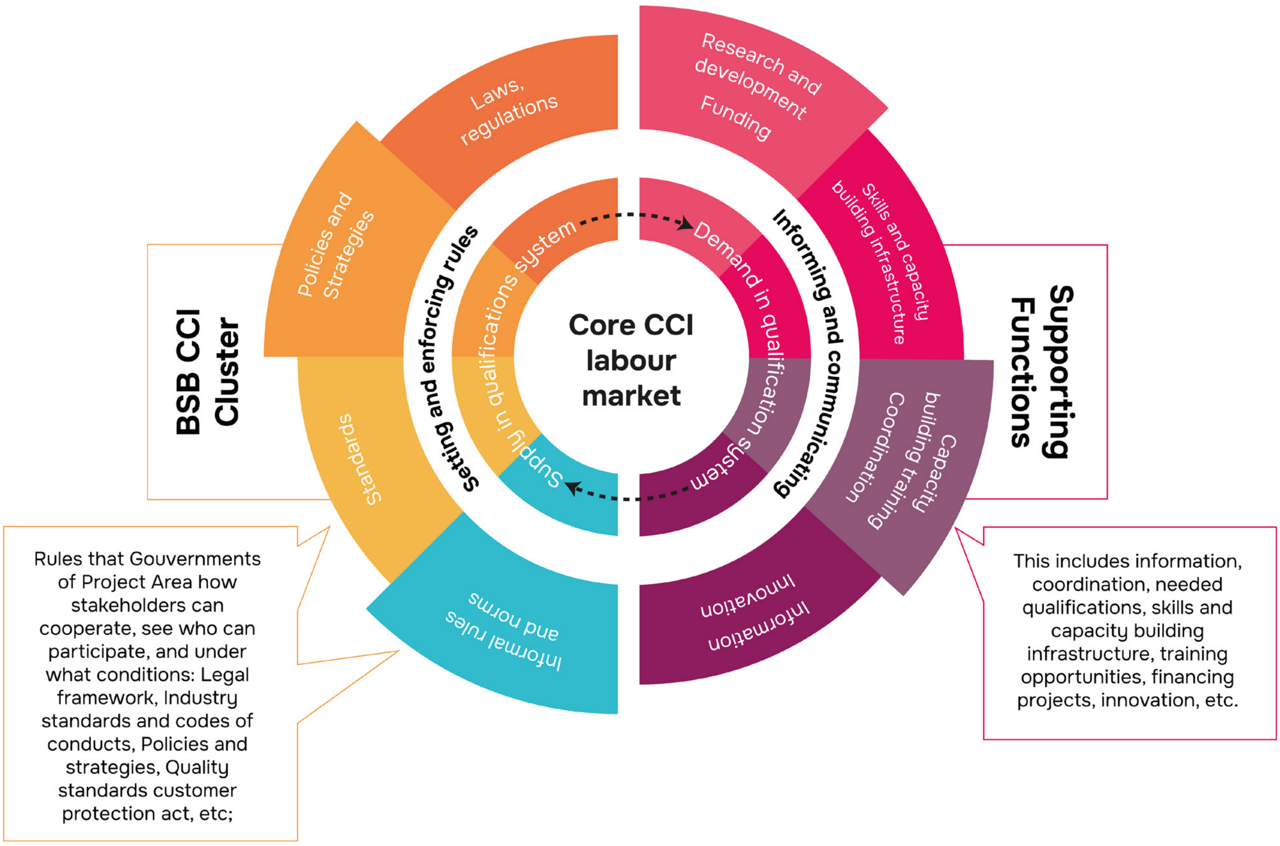
This approach aims to accelerate cultural and creative sector growth by improving outcomes that are important to increase the critical mass for CCI involvement in cultural tourism and service design. Projects that use MSD, as a framework aim to change the structure and characteristics of markets to increase participation of CCI actors on terms that benefit them. These objectives are based on the premise that well-functioning markets can help capitalise on the cultural heritage, offering improved cultural outputs, and empowering CCI professionals with better employment opportunities. It addresses the behaviour of the private sector and therefore reinforces the strengths of market systems.

The study has the **following limitations:**

- The access to relevant information in terms of the content and recent statistical data was limited as basic indicators to map the role of culture in the economy and society are not available for all PA countries,
- Highly fragmented available data due to extended area of research,
- Not all PA countries made the recent CCI statistical data available,
- Implementation time constraints,
- Covid-19 and geographical location: we could only meet online with a limited number of relevant stakeholders.

The scheme below explains MSD approach related to the systemic and cross-sectoral perspective to the cooperation modi and competitive inclusion within Black Sea Basin Cultural and Creative Industries Cluster.

Fig. 1. **Structure of the Market System Development: a systemic and cross-sectoral perspective approach to cooperation modi and competitive inclusion within BSB CCI Cluster**



ABBREVIATIONS

bn — billion

BSB — Black Sea Basin

CCE — Creativity, Culture, Education

CCI — Cultural and Creative Industry

CCIS — Cultural Creative Industry Sectors

CHI — Cultural Heritage Institutions

DT — Digital Transformation

GLAM — Galleries, Libraries, Archives, and Museums

GVA — Gross Value Added

ICT — Information and Communications Technology

İKSV — İstanbul Kültür Sanat Vakfı or Istanbul Foundation for Culture and Arts

IP — Intellectual Property

IPRs — Intellectual Property Rights

LDC — Least Developed Countries

m — million

MSD — Market System Development

NSRF — National Strategic Reference Framework

PAA — Performance Arts Awards

R&D — Research and Development

SMEs — Small and Medium-sized Enterprises

UNCTAD — United Nations Conference on Trade and Development

VET — Vocational Education and Training

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Photo credit: Belîi Aliona, „BAOBAB" SRL, freepik.com

CHAPTER I

Cultural and creative industries in the project area

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PRIMARY FINDINGS

Primary findings revealed that all Project Area countries identified cultural and creative industries as an important economic sector with an enormous growth potential.

Analysing CCI profiles in all Project Aria countries, a strong importance is ICT sector, representing the highest productivity and economical strategic importance for each of the researched countries. At the same time, the potential of heritage culture is under-recognised, being less explored and supported from the economical point of view. This sector is hardly considered as an integral part of the economy partially due to weak existing evidence concerning its contribution to overall growth and quality of life improvement, and partially due to low recognition of its potential, being seen as a sector with low productivity and need for resources.

Project Area countries have different cultural backgrounds, level of economic development, human capital, and available infrastructure and funds. Still, diversity may bring additional value throughout this joint exploration of countries' potential.

1.1 CCI countries' profiles

1.1.1. CCI overview in Moldova

CCI sector accounts for 3.31% of GDP	Top CCI sectors:
*according to 2018 data	software and databases, press and literature, and advertising

The creative potential of the Republic of Moldova is supported by the location of the country at the crossroads between east and west. The first study published on this matter commissioned by AGEPI-State Agency on Intellectual Property revealed that the copyright industry makes up 4% to the country's Gross Value Added (GVA), 3.3% of its GDP, and stands for 3.5% of employment. The most important industries in terms of GVA and employment are software and databases, press and literature, and advertising.

Moldova has many multilingual CCI professionals, with access to new technologies, and one of the best internet connectivity in the world.

The Romanian Government and institutions frequently support Moldovan cultural and creative sectors. This close cooperation is the result of the language and cultural sharing, and it is fruitful ground for creation and production. Many Moldovan citizens have double nationality that provides them with the opportunity to travel easily and establish businesses in Romania. Furthermore, Moldovan citizens have had an EU visa-free regime since 2014.

Good cooperation with and investment flow from Romania allows a productive shared cultural space. In the CCIs sector, there are a lot of exchanges and joint projects, notably in the film and audio-visual, literature, publishing, and performing arts. For example, film professionals often prefer to work with Romanian studios which can provide a wider range of services.

Moldova has the potential to grow as a regional hub for audio-visual production, one of the fastest-growing economic sectors in the world, due to its close relationship with Ukraine and Romania, which have the required infrastructure and facilities in place.

ICT sector

The ICT sector has reached a notable success in Moldova. The exports of ICT services amounted to $164m in 2018 — an increase of 40% compared to 2017, and an increase of 40 times compared to 2005. This proves that the Republic of Moldova is a valuable source of IT talent for international creative markets. It has a pool of skilled and tech-savvy creative talents, a wide range of technologies, and a thriving ecosystem of creative services. In addition, there are several business incentives that the ICT sector benefits from, aimed at attracting international investments and boosting the creation of new businesses. Still, the local companies cannot afford to invest in R&D and its mostly being commissioned by foreign companies or relies on foreign funding.

Design

Over 500 design companies and freelancers from Moldova are currently exporting their services via Upwork and similar international platforms. Moldovan designers have extensive knowledge of Adobe Illustrator and Adobe Photoshop, and their services range from product design, illustration, and identity design to industrial design, UI and UX.

Handcrafts

In Moldova, there are many cultural opportunities due to its strong cultural and creative roots and associations (over 50 craftsmen associations, over 40 folk dance and music ensembles).

Due to the extreme circumstances caused by the pandemic, craft activities, HoReCa, and tourism, got combined, resulting in innovative approaches. The CCIs have changed, especially in their promotion and advertising tactics, while dealing with COVID-19. Digitalisation of some business sectors (including CCIs) ensured their survival during the pandemic and gave hope for a continuation of their activities.

Cultural Heritage

In terms of capitalisation of national heritage assets, Moldova has a lack of training and knowledge to promote museums and cultural events. Elena Cojocari, the Museum of Ethnography and Natural History representative, has mentioned during a stakeholder focus group that *'Moldova has undeveloped cultural marketing'*.

Publishing

Fostering publishing services is the only opportunity for Moldova to shift from export of creative services to creative products which will bring higher value.

Film, video production and photography

According to the National Bureau of Statistics there are 1*47 production companies registered in Moldova, employing 264 people*. According to the Audio-visual Council's register of TV Service Providers there are currently 84 TV stations operating in Moldova. Public TV broadcasters show mostly national productions.

Moldova has limited capacity to invest in local film production. Like most European countries *the Moldovan film industry is rather small and fragmented, relying on state support*. It is skilled and low-cost, displaying the capacity to attract international co-productions and projects. Although, a total of 9 international co-production projects were supported by the National Centre of Cinematography – an important local stakeholder in the audio-visual (AV) sector.

The National Cinematography Centre is a supporter of all these festivals, allocating funds from the state budget and supporting the law on cash rebate. The talent potential in the film and video production industry is defined by the services provided in the post-production niche, such as video editing, sound engineering, sound and video special effects VFX, colour grading etc.

> *"The Government is aware of the economic potential of the CCI sector and keeps investing in it. The Ministry of Culture financially supports the sector, but resources are limited. A good reform was done for the audio-visual sector through the Cash rebate law. The scheme offers a cash rebate of 25%, with a supplementary 5% for productions that specifically promote Moldova."*
>
> **related Viorica Cerbusca, Director**

There are at least 5 film festivals that are held in Moldova on an annual basis:

- Cronograf International Documentary Film Festival,
- Animest – International Animation Festival,
- RAVAC International Film Festival dedicated to fiction films,
- DAC Film Fest and
- Moldox Documentary Film Festival.

ACHIEVEMENTS

The first Moldovan virtual reality animated film, 'Aripi' (Wings), *won awards in the categories of Best Music, Best Sound, and audience-driven award for Best Animation. The film has also won prizes at prestigious international film and animation festivals "Festival du Film Merveilleux et Imaginaire" in France and the "International Independent Film Awards" in the U.S., putting Moldova on the map as a regional creative and production hub.*

CCI labour market in Moldova

The emerging creative market is represented by over 2 800 companies, mostly SMEs. The number of creative sector companies in Moldova is continuously growing, with an increase of 20% from 2015 to 2018 (from 2,410 to 2,823 companies). Most of them are micro-enterprises with an average of 7 employees. Their typical employees are young and their jobs are well-paid. This means good work opportunities closer to home, helping to reduce brain drain. **CCIs are concentrated in urban areas.**

The creative industry employs more than 13,000 people. However, the number of persons providing services in the Creative Industry is considerably higher than this if we consider freelancers. As such, more than 3,000 Moldovan creative freelancers (photographers, graphic designers, 2D and 3D illustrators, sound and post-production engineers, social network managers, copywriters, and voice-over specialists) are registered on international freelance platforms[3]. They work independently, providing services to local and international customers.

Moldova is developing good connections between the academic institutions and creative sector, enhancing the main actors and empowering talented human resources. The fruitful collaboration between the main creative hubs, ARTCOR and MEDIACOR, and local universities lead to the creation of the new Bachelor's and Master's Degrees **in New Media, Game Design, and Animation in** the fall of 2022.

[3] Upwork.com, Fiverr.com, Guru.com, Peopleperhour.com, Freelancer.com, Skyword.com, Dribble.com, etc.

1.1.2. CCI overview in Romania

CCI sector accounts for 7% of GDP	Top CCI sectors:
*according to 2020 data	ICT: software, publishing, advertising

ACHIEVEMENTS

• *In 2021, Timisoara city gained the title of European Capital of Culture by assuming the concept of Open Art City. Since then, the CCI sector is gaining prominence especially for the development of CCIs in the sectors such as arts and culture, sports, leisure and recreation. This practice could be used as an example of good practice to be replicated in other destinations.*

• *Another* important initiative *refers* **to the digitisation of the cultural movable heritage**, *within the framework of the E-Culture - the Digital Library of Romania project, in which 550,000 items were digitalised and made available within the national digital library –* **culturalia.ro**, *by the end of 2021. Out of these digitalised items, 200,000 are being made available on the European Digital Library –* **europeana.eu.**

• *Two major events were organized that strengthened not only the mobility of the artists and culture professionals but also reinforced the intercultural dialogue: the Romania-France Season 2018/2019 contributed to the strengthening of the economic, scientific, cultural, and social relations between the two countries, while Europalia organised over 250 cultural events in the fields of visual arts, music, cinema, literature, performing arts and theatre, in 2019-2020.*

In Romania, the CCI sector has made remarkable progress in the last years, contributing with 7% of its GDP[4]. The most successful CCIs in Romania are software, publishing & advertising industries. Other important industries are filmmaking, media, performing arts, and music.

The Romanian CCI sector benefits from the country's membership in the European context. At national level, the culture was integrated in the National Strategy for the Sustainable Development of Romania 2030, approved by the Government Decision no. 877/2018.

The CCI sector in Romania is still underfinanced as there are not many public support schemes available, but some of them are listed below

1. Romanian National Cultural Fund is the main public instrument of CCI direct financing. The Fund is supporting small competition-based initiatives that at the same time promote talent, creativity, national identity and heritage, to have a wider impact and understanding on the art performances and to raise visibility among the general public. The mission of the Romanian Cultural Institute is to promote culture and civilisation in Romania and beyond. 2. Increasing the visibility of Romanian cultural values around the world is the main purpose of the activities carried out by the Romanian Cultural Institute.

[4] https://www.interreg-danube.eu/uploads/media/approved_project_output/0001/48/04234887a0b71d4909616b3d0d54d49ed529ea5d.pdf

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One of the Initiatives is the Cantemir Programme – a support Programme for Translations and Publications – which offers scholarships through which cultural projects from Romania or abroad, with relevance for the Romanian cultural space, can find funding.
3. The National Cinematography Centre supports development of Cinematography and Romanian Culture. The Cinematographic Fund offers support and grant funding, such as:

- financial support for the organisation of film festivals with the participation of Romanian films and filmmakers,

- financial support, for any other forms of creating value for the Romanian cinematography and the national cinematography heritage,

- awards for the creation and production of Romanian films,

- support for the editing of specialised publications.

Creative Europe is the most important funding program of the European Union dedicated to supporting creative fields, culture and audio-visual projects, having a total budget of €1.46 for the period 2014-2020. The program is administered by the European Commission (Executive Agency for Education, Audio-visual and Culture).

The CCI sector needs both financial support and raising awareness of the benefits it holds for other sectors and communities."

says Valentin Stefan, Director at Digital Adviser Project.

Various stakeholders of the local cultural ecosystem are united by their shared cultural identity and values. Therefore, CCIs are connected to their local cultural ecosystem through shared values, which creates more opportunities for them at the local level. The creation of a country's cultural value and the enhancement of its cultural identity, including both tangible and intangible cultural heritage, are therefore crucial in the allocation of financial support to CCIs entrepreneurs.
There is a misalignment between the perspective of the local ecosystems resource allocators and that of the local CCI entrepreneurs on the importance of local value creation and the enhancement of local cultural identity. The joint effort of companies (local and foreign), universities, local governments and civil society is necessary to overcome the obstacles — relatively low entrepreneurial spirit, a mismatch between educational offer and job demand, lack of ICT skilled officers in local administration bodies, and slow starting cooperation between the actors involved in the local clusters.
The ICT sector was developed due to the national Smart specialisation strategy. According to European Cluster Observatory and European Cluster Excellence, in Romania there are 38 innovative clusters, unevenly distributed by development regions, depending on the concentration of companies from CCIs, i.e. ICT being present in North West, North Eastern, Bucharest-Ilfov and Western Regions.
The most developed areas are software, video and computer games, publishing, architecture, and advertising. Creative activities are polarised around Romania's large cities. Many of these cities are developing new tools and facilities to foster the sustainable development and the internationalisation of CCI start-ups has been increasing. Although Romanian government provides as high as 1:1 matching funds, a big incentive for start-ups, entrepreneurs still distrust the government.

CCI labour market in Romania

In Romanian cultural and creative sectors, the main actors are independent artists, companies, non-governmental organisations, and public institutions. While some of these sectors could not practically survive in the absence of incentives and support (programme or project funding, public aid schemes), others do not immediately require such interventions. This is also the reason why some sectors of the listed areas benefit from a distinct regulation, with emphasis on the issue of access to public funding sources, while for other areas the legislator did not intervene expressly, leaving them to work and to be developed in accordance with the applicable general regulatory framework.

The insufficient SMEs-oriented R&D funding is the main barrier for increasing innovation capacity. More specifically, even the CCI companies that have R&D capacity are struggling to harness it, as most of their employees are involved in productive or commercial activities

In terms of innovation barriers, entrepreneurs mention high costs of R&D (56.32%), insufficient company research funding (40.77%), and the incertitude associated with the market demand for new and innovative products. The least mentioned was the lack of adequate human resources (8.49%)[5].

One of the important regional features of CCI labour market is a phenomenon called “start-up drain”, meaning that start-ups are moving abroad. One of the factors that influenced this was that most ICT revenues had come from abroad and the local professionals were interested in jobs where only specific technical skills were needed, rather than implementing their own projects that may require a larger set of skills, such as creativity. Whereas this approach may be seen as profitable in the short term, it may hinder creativity in the long term.

The relatively weak performances of the innovation activity in Romania may be explained by reasons related to underfunding and weaknesses of the human resources involved in the research process, also determined by some structural aspects of regional economies and by the indirect influence exerted by certain aspects of the regional cultural matrix.

In terms of institutional framework, the market for CCIs is small and some infrastructure facilities are missing. That is why many trained professionals are not able to find jobs.

1.1.3. CCI overview in Bulgaria

CCI sector accounts for 5.54% of GDP	**Top CCI sectors:**
*according to 2019 data	computer programming, film production, advertising

[5] https://www.nemo.org/fileadmin/Dateien/public/Working_Group_1/Working_Group_MCI/White_paper_for_CCS_in_Romania.pdf

The cultural and creative industries in Bulgaria are increasingly being perceived as a **significant sector of the Bulgarian economy** due to their important contribution to local, regional, and national development, also having a positive impact on the local labour market.

In 2019, the creative industries generated **5.54% of the gross value added in the country and employed 4.92% of its population.**

The creative industry is divided into **11 sub-sectors:** interior design, product design, visual arts, animation, gaming, music, media, film, video, etc. *The export is concentrated in the fields of programming, film production and broadcasts, and advertising*[6].

In Bulgaria, **CCIs are highly concentrated in urban areas and are represented mainly by privately-owned companies.** The leading sub-sectors in its capital, with more than 90% concentration concerning the creation of added value, are the film industry (96.75%) and the software and video games creation (90.35%). The lowest concentration in Sofia has the cultural heritage — only 33.19%, considering the added value of the creation. Bearing in mind that these are museums and immovable cultural monuments, the decentralisation of the same is quite natural. The leading sub-sectors in terms of their added value contribution in Bulgaria are design, cultural heritage, software, and film industry.

The CCI in Bulgaria evolved according to the Sofia Strategy for Culture 2013-2023, Cultural Strategy of Plovdiv Municipality 2014-2024, the National Development Programme: Bulgaria 2020, and the National Development Programme: Bulgaria 2030. Nowadays, the Ministry of Culture in Bulgaria develops programmes aimed at expanding the opportunities for developing cultural activities at all levels, ensuring equal access to funds for producing, distributing, and exchanging cultural products and services. At the same time, financial support is provided to cultural and artistic institutions to encourage cultural diversity.

> *The government is supporting the CCI sector mostly through the EU financial instruments. Alongside, businesses are also often willing to sponsor CCIs.”*
>
> **says Margarita Borisova, Senior Expert, Bulgarian Centre for Heritage Interpretation**

The National Culture Fund, established in November 2000, by the virtue of Culture Protection and Development Act, operates to support the development of culture by raising, managing, and spending funds to pursue the national policy in the field of culture. Individual artists, private, municipal, and state cultural organisations are equally eligible to apply for it.

Various financial and institutional measures, such as the budget programmes of the Ministry of Culture, the National Culture Fund, and the Executive Agency National Film Centre, also contribute to the implementation of the UNESCO Convention. These ministry budget programmes are permanent, which leads to the sustainability of the implemented measures. The process of digitisation of cultural heritage is also gradually

[6] Creative Industries in Sofia pdf

accelerating. Ensuring online visibility of its cultural heritage is one of Bulgaria's top priorities[7].

DID YOU KNOW?

Bulgaria collects the lowest amount of royalties for music and films – lower than those in countries like Macedonia, Serbia, Croatia, Slovenia and others: "Royalties for authors in the audio-visual sector in 2020 represent 0.0010% of Bulgaria's GDP, which means that Bulgaria spent €0.09 per capita over the whole year on this sector. The situation is similar in the music industry – 0.007% is collected as a percentage of GDP in Bulgaria, which is only €0.65 per capita in 2020", **explains Maria Palaurova**[8]**.**

The Bulgarian Government should take note of this fact and facilitate better capitalisation of the country's creative resources.

Due to urbanisation, cultural national policy, strategies, and the related activities became more focused on the major cities and some municipalities.

Sofia, Bulgaria's capital, **is considered the national centre of cultural and creative industries.** The major indicators of economic significance of the CCI – added value, employment, turnover, number of enterprises, and direct foreign investments show a concentration between 49% and 92% in the city. Due to this, Sofia is considered by some a city of cultural and creative industries, and even referred to as *Creative Sofia*[9].

The cultural and creative industries in Sofia attract from 80% to 94% of the foreign investments. Investors' top choices are the radio, television and new media, advertising, printed media, and reflect mainly the purchase, sales and redistributions in the media sector. Some of the activities are concentrated almost entirely in Sofia, eg **the radio and television (93.5%)** and **the production of films and TV shows (96.3%).** Others, like **Photography (50%) and Architecture(68.5%), are rather scattered across the country.**[10]

Moreover, three-fourths (33,000) of all professionals employed (44,300) in the creative sector in Bulgaria are based in Sofia. The distribution across the different activities, however, is uneven. While 93% of those employed in motion picture, video and television programme activities are in Sofia, only 35% of those employed in photography and 53% of those in design work in the city. However, Sofia's share in most of the creative activities is between 65% and 80%.

There are many **academic institutions** in Bulgaria **that specialise in creative and cultural activities** — Master's degrees in New Bulgarian University, University of World and National Economy, The University of Veliko Tarnovo, Varna University of management, etc.[11]

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[7] UNESCO

[8] https://www.saa-authors.eu/en/news/761-alliance-for-the-development-of-creative-forces-in-bulgaria#.YnFty1VBypo

[9] ECONOMIC CONTRIBUTION OF THE CULTURAL AND CREATIVE INDUSTRIES IN SOFIA: THE EDUCATIONAL, CULTURAL AND POLITICAL, SPILLOVER EFFECTS, Assoc.prof. Bilyana Tomova PhD1, Diana Andreeva PhD2

[10] Creative industries in Sofia, 2018, Institute for Market Economy

[11] Danubian baseline study

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Due to the implementation of the international project *“Media Motor Europe Innovation Hub”, funded under Horizon 2020*, a group of deep-tech and innovative companies with significant R&D and market potential received support and assistance. The project planned to build a strong and vibrant European media-tech and deep-tech ecosystem targeting the media and the creative industries. It assisted high-potential start-ups and scale-ups to connect with Investor Networks. Leading players from the media industry ecosystem in Bulgaria are being involved in close cooperation, including media companies, universities, R&D organisations, deep-tech companies and experts, business accelerators and incubators, business mentors, and consultants.

Missia23, a creative hub in Sofia, raises general awareness of creative industries, but hopes to enable an acceleration program. Missia23 also partners with The Landing, a similar creative tech hub in Manchester, UK, the Bulgarian Innovation Hub in Silicon Valley, and the Vienna Business Agency.

> *‘It’s about time for Sofia to stop being an outsourcing destination and start to create its own content. We want to link the creative industries, a very fragmented sector so far, with the best of the technology worlds.’*
>
> **says Genoveva Hristova-Murry, co-founder of Missia23.**[12]

Bulgarian cities contain a high potential to promote exceptionally diverse but complementary tourism elements. Creative tourism is one of them that fits with the presence of both intangible heritage and creative industries. The concept of Creative Tourism appeared in the 2000’s and is defined as Tourism that offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences, which are characteristic of the holiday destination where they are taken.

ACHIEVEMENTS

In 2014, Sofia was selected by UNESCO as the City of Film and became a member of the Creative Cities Network by UNESCO.

In 2015, Plovdiv was selected for European Capital of Culture 2019.

As Mrs. Tania Venkova Hristova underlined, ‘the Carnival of Gabrovo and other events, like the Festival of Humour, are a new purpose of travel that enriches the existing offers of crafts and folk activities, for which the city has been awarded as a Creative City by the UNESCO. The Creative Tourism Network officially recognised the city of Gabrovo as a Creative Friendly Destination for its assets in terms of cultural and creative resources, as well as for its proactive engagement to create an ecosystem between tourism and other sectors, like culture and education, among others.’[13]

[12] https://www.trendingtopics.eu/missia23-the-new-hub-in-sofia-on-a-mission-to-bring-creative-industries-and-tech-sector-together/

[13] http://www.creativetourismnetwork.org/creative-tourism-in-bulgaria/ YnFty1VBypo

1.1.4. CCI portrait in Greece

CCI sector accounts for 1.4% of GDP	Top CCI sectors:
*according to 2021 data[14]	Publishing, software publishing and computer programming

Cultural and creative sectors in Greece provide about €2.1bn added value for the Greek economy and a 1.4% contribution to the GDP. Cultural professionals account for 3.2% of active workforce. 6.6% of total enterprises are generating more than 5.3 bn sales in cultural and creative industries.

The sectors contributing to added value the most are publishing (€371m), software publishing and computer programming (€ 297m), the audio-visual sector (€208m) and the television, radio, and communication sector (€203m). The advertising and audio-visual, radio and television industries have the biggest output multipliers in all the Greek economy sectors.

DID YOU KNOW?

Greek museums are currently showing only 7% of their collections and the rest of the artefacts are kept in storage. These unexploited collections could bring in money and develop the economy by offering working opportunities to newly qualified staff.

Greece ranks 10th (in EU-28) regarding intra-EU exports and 16th in exports to non-EU countries. Greece is a net cultural goods-importing country and is running an important cultural current account deficit. Greece imports annually €181m of cultural products and exports only €110 million.

The creative industries' output in GDP is poorly distributed among metropolitan hubs and the periphery. Athens and Thessaloniki account for 85% of CCI output in Greece. The problem of decentralisation is very complex. Therefore, in recent years, the ambitious plan to promote filmmaking in Greece by the Centre for Audio-visual Media and Communication (EKOME) resulted in filming in 150 distinct locations, with an important spillover in local economies[15].

The cultural and creative sector in Greece is facing numerous challenges, namely the rapid change caused by the digital shift and globalisation, market fragmentation relating to linguistic diversity, difficulties in accessing finance, complex administrative procedures, and a shortage of comparable data.

The Greek government made a strategic choice to use the financial support provided by the European Union in the form of the Recovery and Resilience Facility and proceed with much-needed reforms and investments in the cultural and creative sectors.

’The structural reforms to increase the sector’s resilience and competitiveness, and protection of the employees include:

- Reforms related to labour relations and social security issues,

- Tax reforms,

- Further strengthening the protection of intellectual property,

- Incentives to transition from grey to white economy across different cultural value chains,

- Improvement of access to funding,

- Reforms related to cultural education,

- The inauguration and utilisation of a new entity, Acropole Across, which aims at providing funding, skill building, networking, and marketing opportunities to members of the cultural and creative sectors,

- Audience development strategies to increase the visibility of contemporary Greek cultural production both within Greece and abroad,

- Utilisation of technology to support innovative solutions for the production and dissemination of cultural works,

- Strategies for the higher visibility of the sector as a key contributor both in Greek society and economy, as well as in the overall stance of Greece and the wellbeing of its citizens (hard and soft data).’

explains Anna Papanikola, CEO & Founder at Filmosophy.

In the National Strategic Reference Framework (NSRF) 2014-2020 culture became mainstream in all sectoral and regional operational programmes. This was because culture, together with tourism and the cultural and creative industries, has been identified as one of eight priority sectors that are expected to make a greater contribution to economic growth.

The new Creative Europe Programme is one of the financial instruments of the Multiannual Financial Framework 2021-2027 and is a unique initiative for coordinated and constructive support in the cultural, creative, and audio-visual sectors across the European continent. Its main objective is to promote European Culture and to contribute to the formation of a European cultural identity. The Creative Europe 2021-2027 Programme builds on the achievements of the former Creative Europe 2014-2020 Programme but is more ambitious and seeks to respond to recent developments, such as increased global competition and digitisation. The Creative Europe Programme consists of the Culture and MEDIA sub-programmes, and the Cross-sectoral action.[16]

More than 71% of the creative enterprises in Greece are either a sole proprietorship or an enterprise with one employee, 25.4% employ two to nine persons, while enterprises with 50 employees and more represent barely 0.6%. *Sole proprietorships and enterprises with up to 9 employees produce 55% of CCIs’ added value in Greece, while those with more than 50 employees produce 26% of the added value.*[17]

[16] https://www.culture.gov.gr/en/service/SitePages/view.aspx?iID=4536

[17] Mapping the cultural and creative industries in Greece, 2017

The ecosystem of various public and private entities become strengthened. Several co-working spaces and clusters are operating in CCIs in Greece.

Agora, Thessaloniki's Film Market (part of the Thessaloniki International Film Festival) established a unique form of introducing professionals from South-East and Central Europe, the Balkan region, the Mediterranean, as well as the rest of the world, to invited industry professionals, consultants, tutors for potential collaborations. A private-sector example is the case of Corallia gi-Cluster. It has a strong focus on video games and the visual arts.

The cultural sector of the NGO ecosystem in Greece is quite a young developing segment, part of the Greek non-profit ecosystem. The non-profits are working around social or health issues but have gradually been introducing in their activities a lot of dimensions of the cultural economy so that they bring about better effects on what they were doing. Eyes of Light and Liminal are two organisations focusing on enhancing diversity and access to culture. Another example is the Onassis Cultural Centre, which has an international program and aims to create synergies with other institutions to facilitate the circulation of creative works within and outside Greece.

Artworks is a highly ambitious, though less known programme, sponsored by the Stavros Niarchos Foundation. Artworks provides small grants to visual artists, curators, filmmakers, dancers/choreographers helping validate the originality of their work and, thus, boost their recognition across various channels.

'Greece is right now in a unique position to develop the contemporary art market and claim its art market share within Europe. Greece with its unique combination of rich cultural heritage, magnificent natural beauty and affordable living costs is a pole of attraction for international artists who are interested in hosting exhibitions in local galleries and institutions and even establishing studios and moving part of their artistic production.

Additionally, Greeks are some of the greatest private collectors of Modern and Contemporary Art in the world. There is a trend, accelerated by the pandemic, for decentralisation of big art centres and focus on local markets which present growth potential for Greece. Especially with the UK's departure from the EU, Greece could attract some of the art market transactions. However, there are a few challenging factors that need to be addressed for Greece to reach its full potential such as the import tax and VAT for artworks, financial motives for donations to cultural institutions as well as the activation of existing laws that promote art and culture.'

concluded Christina Papadopoulou Director, Gagosian Athens

Despite the richness of the cultural heritage and its bustling social and cultural life, the Greek tourism offers potential remains still largely unexpressed. Mass tourism schemes, the seasonal nature and concentration of flows in main destinations jeopardise sustainable development and the undisclosed potential of creativity.

1.1.5. CCI overview in Turkey

CCI sector accounts for 2.88% of GDP	Top CCI sectors:
according to 2017 data	Information technologies, software and computer services (gaming)

The creative economy in Turkey had a turnover of approximately $28bn, production amounting to $25bn, $7bn of value added and 344,000 employees, according to 2017 data. These industries comprised 3% of overall production, 2% of national turnover and 1% of employment in Turkey.

'Turkey has a great and rich heritage in terms of Cultural and Creative Industries. This heritage is open to development and its competitiveness is high. Cultural and creative industries should be prioritised! It should lead the change and transformation in the renewal of society.' Said Aydın Topçu, Director at Harman Publishing

In terms of turnover, value added, productivity and employment indicators, computer programming is the highest performing activity among the Turkey's creative industries. The closest runner-up to this industry is computer consultancy activities.

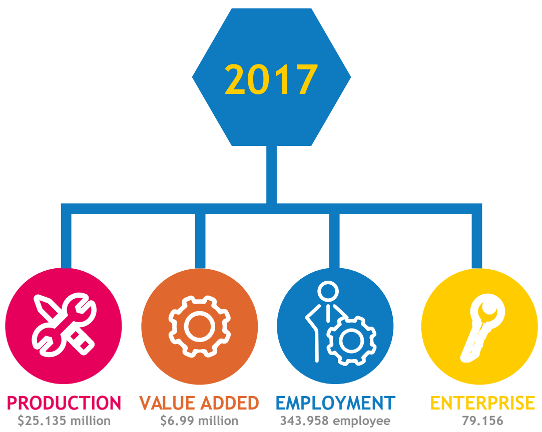


Fig. 1.1.5.1. Profile of Creative Economy in Turkey (NACE rev.2) in 2017

Source: Calculated by authors of *Analysis_of_the_Creative_Industries_in_Turkey using Annual Industry and Service Statistics 2009-2017 Micro Data Set*

When examined by cultural areas, in **2019 the highest share belonged to** design services (69%), and the second largest share – to handicrafts (29%).

Advertising agencies created the highest employment in the creative industries, with 71,000 employees in 2017, followed by computer programming (55,000 employees) and then by architecture (49,000 employees). The industry with the highest productivity is motion picture, video and television programme distribution with a value of $55,000. The second place was held by television programming and broadcasting activities with $45,000, and operation of arts facilities came third with $38,000.

The highest number of employees within the creative occupation groups in Turkey is in crafts, with 142,000 workers.The second highest number of employees is in advertising and marketing, with approximately 135,000 workers.

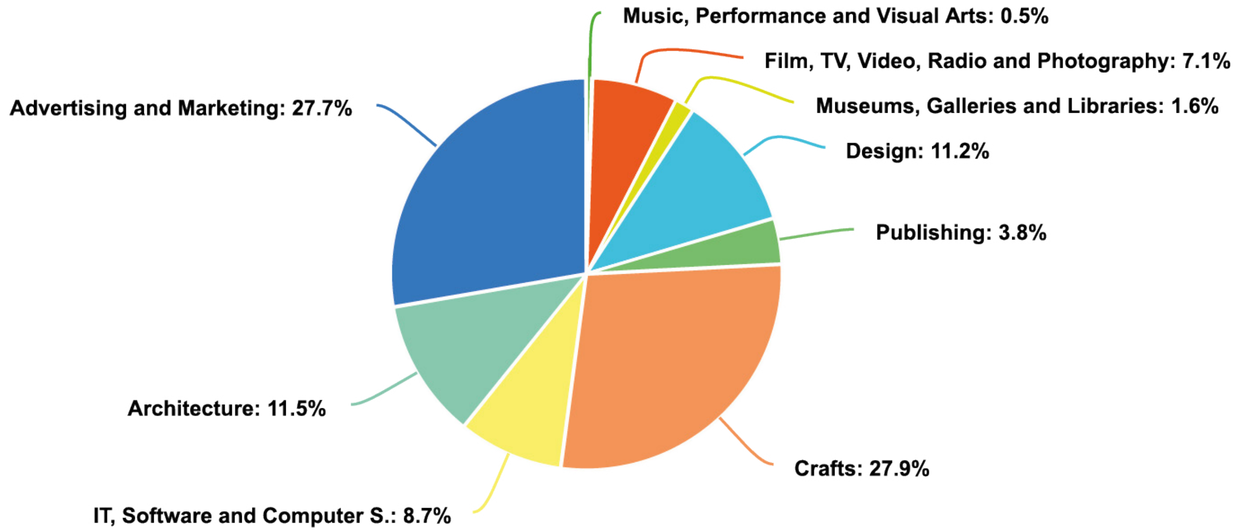
DID YOU KNOW?

As an important cultural product, Turkish TV series attract great attention in international markets and contribute to the promotion of Turkey's culture and diversity of cultural expression. Before the COVID-19 pandemic, research revealed that the Turkish audience prefer watching movies at home rather than going to the movie theatres. The cinema industry in Turkey enjoyed record-breaking box office returns, with over 59 million viewers and total revenues of about 127.3 million US dollars, most of which came from domestic movies.

In 2019 Turkey registered a decrease in cinema attendance, while EU cinema attendance increased by 5.5%. While the audience adapted to the change in the industry rather quickly, the perks of digitalisation are highly debated at the supply side of the industry. The Turkish film, television and interactive digital media market has shown a rapid evolution especially in terms of digitalisation in the last couple of years (2016-2017). As a result of the increasing global demand in the digital platforms, Turkish producers started to create contents for these new media (such as Netflix, puhutv, BluTV) while also contributing to the traditional channels.

Fig. 1.1.5.2. Share of creative sector **Source:** Geostat

Software, computer games, and the database sector lead the way in their contribution to value-added, employment, labour productivity, and export among the copyright-based



industries, which are the most important element of Turkey's cultural industries. The fact that Turkey's population is young and has a high interest in this sector creates the expectation that it will become more assertive on global markets. Supporting these sectors will significantly contribute to Turkey's economy in terms of both employment and added value.

DID YOU KNOW?

'After high school, Istanbul's young game developers are chased and headhunted by vampirish publishers who sign them up on one-year contracts, which allow them to out-earn their parents. For Turkish teenagers, the appeal of a career in game development is magnetic.[18]' **revealed Peak's co-founder Buğra Koç.**

[18] https://restofworld.org/2021/turkey-gaming-peak/

The Istanbul Creative Industries Network is supported by the Ministry of Trade and Customs of Turkey, Istanbul Metropolitan Municipality, Istanbul Development Agency, Istanbul Chamber of Commerce, Yekon Creative Industries Council, Istanbul Creative Economy, Cultural Industries and Creative Cities Research Centre, and UNCTAD.
Turkey has a **few cultural centres** with great potential when it comes to CCI infrastructure, such as **Istanbul, İzmir, Ankara, Diyarbakır, Mersin, Muğla, Çanakkale, Bursa, all rich in creative hubs.**
Istanbul is known as *Istanbul — the Creative City of Design*. Istanbul's thriving creative sector employs 140,000 professionals and accounts for 74.5% of the country's turnover. The city boasts a significant number of cultural infrastructures; *Istanbul is also home to lots of universities that all offer education programmes related to design*. Innovation and creativity are the main components of Istanbul's vision and recent policies that could be used as models for other regions.
As a design hub, Istanbul has a lively event programme, hosting more than 20 internationally renowned design events every year, such as Istanbul Design Biennial, Design Week Turkey, EcoDesign Conference and Fashion Week Istanbul.

> *'Izmir is the Silicon Valley in America — a point that everyone knows, has a unique atmosphere, seen as an inspiration for creative ideas. In a way, it is the centre of innovation and creativity'*[19]
>
> **said Dr. Sevay İpek Aydın, Create In Izmir Project Coordinator and IEU + KREA Director**

The Create in Izmir project made the city the focal point of creativity by producing projects in the field of entrepreneurship and innovation (the project received funding from the Ministry of Industry and Technology in Izmir in 2020). The project was chosen from among over one hundred projects across Turkey. The project's goal was to bring the creative industries business stakeholders together in Izmir, and it was designed to be fully digital.
The project focused on how creativity in technological, scientific, economic, artistic, socio-economic fields will bring more income. These industries include Advertising, Architecture, Art and Antique Markets, Craft, Design, Fashion, Film and Video, Game Industry, Music, Performing Arts, Publishing, Software and Computer Services, Television and Radio.*Create in İzmir* brought an important opportunity in terms of increasing the recognition of İzmir in the world, making it attractive for creative industries and developing strategic activities.
Bilişm Vadisi is an incubation centre which hosts over 150 start-ups. The total volume of investments in Turkish start-ups increased by ninefold in 2021 compared to the 2020.

> *'Entrepreneurs who have participated in the last two camps have attracted $5 million in investments. We have created nearly 50 start-ups. So, these young people attended the camps and then established their own entrepreneurships. And two of them moved to the U.S. to operate on the international level.'*[20]
>
> **said Ahmet Serdar İbriahimcioğlu, General Manager of Bilişim Vadisi.**

[19] https://www.izmirekonomi.edu.tr/en/news/type/read/id/7089

[20] https://www.hurriyetdailynews.com/turkey-to-ramp-up-its-share-in-150-bln-gaming-industry-171150

The main reasons for the increased interest in creative industries all over the world is due to the perceived high growth potential, associated with innovation and prosperity, and gaining competitive advantage in international trade.

1.1.6. CCI overview in Georgia

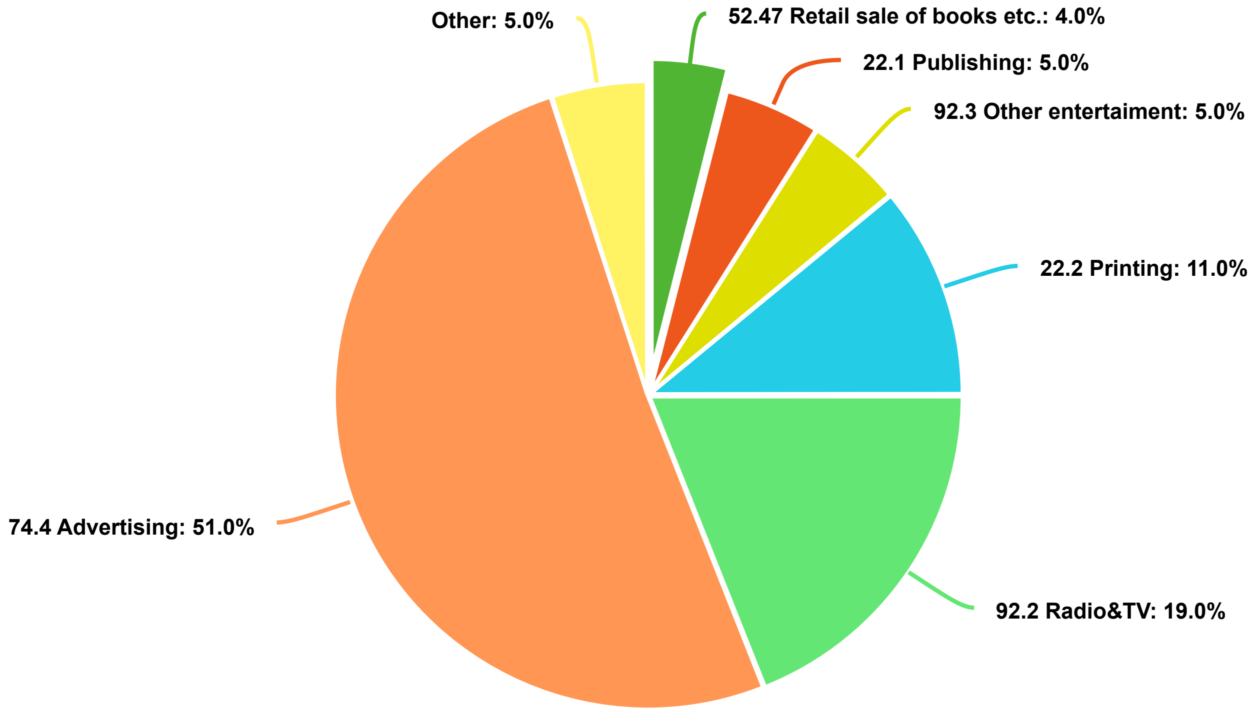
CCI sector accounts for 2.8% of GDP	Top CCI sectors:
according to 2017 data	Advertising industry

Georgia's creative sector is not big, but its economic importance has been growing steadily over the last few years. According to 2017 data, the share of the cultural sector accounts for 2.8% in relation to the GDP. Nowadays, the creative industries make up 1.5% of gross value added of the Georgian economy and 1.1% of its employment.

A small number of creative industries make up most of the sector. **The most important economic sectors are advertising, radio and TV, books, media** (including printing and retail sale of books, newspapers and stationery), **performing arts and artistic creation** (including most *of other entertainment*). Three other creative industries are *small in economic importance* in today's Georgia: archives, libraries, cultural heritage, music, video, and film.

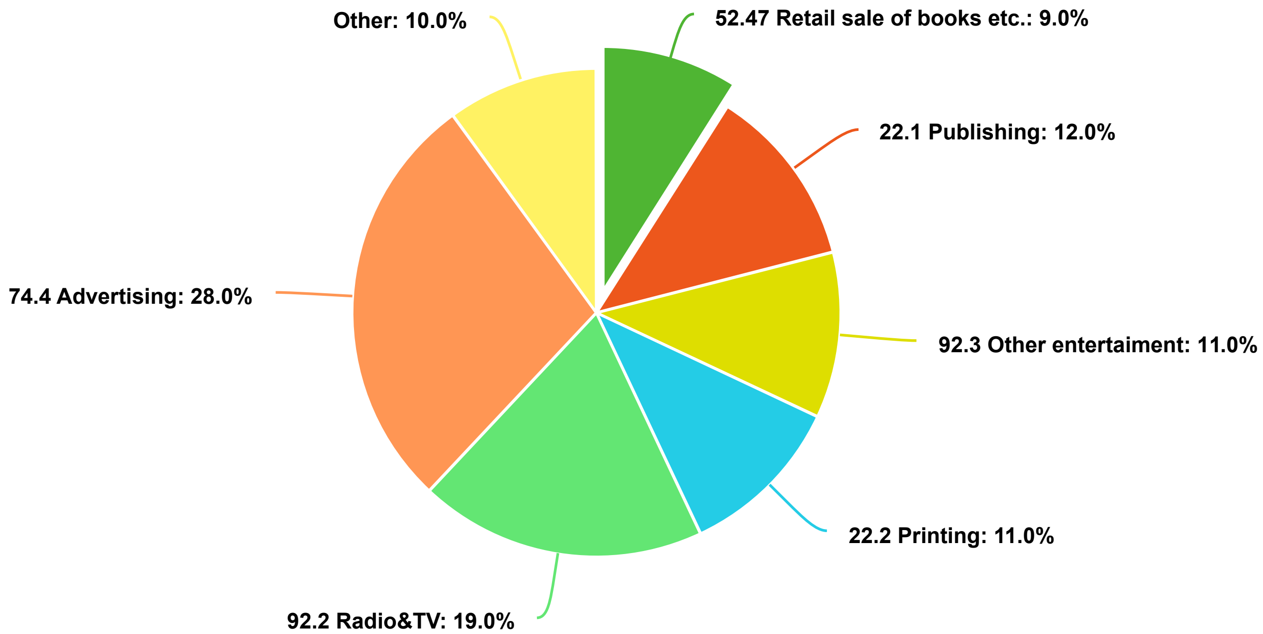
Georgia's creative sector is hence *currently dominated by commercial activities* such as advertising, radio, and TV rather than cultural activities such as music, museums or visual arts.

Fig. 1.1.6.1. Share of creative industries in creative sector GVA



Source: Geostat

Fig. 1.1.6.2. Share of creative industries in creative sector employment



Source: *Geostat*[21]

Advertising makes up more than half of current economic activity in the sector and almost all the gain. Other large components of the sector are radio and TV, books and print media industry. Each of them makes up around 20% of the creative sector but does not substantially contribute to growth.

According to 2017 data, the cultural sector accounts for 5.2% of employment. Culture and Creativity leading sectors in terms of economic productivity are performing arts (67.3%), audio-visual (38.3%), and heritage (32.8%). More than 54% of those employed in the cultural sector are women.

Georgia often featured in international media for its food, heritage, nature, fashion, design, and film becoming an attractive destination for tourists, hikers, foodies, and wine experts. The liberalisation of the EU visa regime for short-term stays by Georgian citizens provided free movement and exchange with the EU and is the result of Georgia's successful implementation of diverse EU-sponsored reforms.

In 2016, the government adopted its Cultural Strategy 2025, which recognises the potential of CCIs as contributors to economic growth. The strategy was developed in active cooperation with civil society, international organisations, legal entities of public law working in the field of culture and other cultural stakeholders. The year 2017 saw the development of a Roadmap for Developing CCIs and the establishment of LEPL Creative Georgia, a legal entity of public law within the Ministry of Education, Science, Culture and Sport, whose mandate is to create a favourable environment for the development of creative industries through relevant policies, programmes, projects, and grants.

The government attracted foreign investment into the country through the Trade in Georgia platform as an entry and promotion point, notably by facilitating procedures, improving the business climate and nurturing the tech sector. It has also been actively participating in trade fairs missions abroad and developing export skills.

[21] The creative sector in Georgia: Situation, potential and policy issues, BERLIN/TBILISI 2017

> *'The government supports the development of CCI through funding various types of projects. For CCI further development, the government needs to provide more funding, raise awareness, and train CCI labour force promoting effective development management.'*
>
> ***shared Valeri Shoshiashvili, Director of Kakheti Destination Management Organisation Visit Kakheti***

The government via Enterprise Georgia (under the Ministry of Economy and Sustainable Development), the National Film Centre (under the Ministry of Culture and Monument Protection), and the Tbilisi City Hall have focussed on developing SMEs by providing training and consulting for business development, facilitating access to finance (credit and leasing options), and opening up to international markets. Based on studies supported by international organisations such as the German Development Agency GIZ, the prioritised areas include food, fashion, textiles and shoes, hospitality, and film post-production industries. These sectors have been identified as capable of attracting both foreign and local investments and of targeting EU and post-Soviet markets.

Relatively low cultural consumption reveals internal territorial and social imbalance. Georgian household expenditure on cultural activities, goods and services set against total consumption was 1.1% in 2015. Furthermore, there was considerable imbalance between the higher consumption rates in Tbilisi and among the wealthier social classes and the much lower consumption in rural areas and among people on a lower income.

The technological potential is not sufficiently connected with emerging CCIs. Technological capacity (eg good internet coverage and specific public investment in promoting entrepreneurship and innovation) has not been linked to areas such as bio-gastronomy, design, fashion and film, in which creativity can add distinctive value.

In Georgia, there are emerging creative hubs, including incubators and co-working spaces mainly in Tbilisi that are not solely dedicated to CCIs. Several Fab Labs have been established in the capital and throughout the whole country. Most of them are promoted by the Ministry of Education and Science and within GITA's tech parks. Others have been integrated within universities –the Academy of Arts, Ilia State University, Georgia American University, and Tbilisi City Hall.

Despite that, there is a significant number of spaces that are less accessible and affordable to CCIs.   Whilst a continuous deterioration of industrial heritage sites is detected - places that could be revitalised to serve as creative clusters.

DID YOU KNOW?

'The repurposing of unused factories and warehouses into creative spaces to revitalise cultural activities is part of the government's Cultural Strategy 2025."

Mr. Valeri Chekheria (CEO of Adjara Group) presented a successful example by converting multiple abandoned buildings into boutique hotels with spaces dedicated to Georgian creatives.

In Georgia, the corporation Adjara Group runs many good social projects for supporting CCI development in Georgia:

The Black Sea Programme is co-financed by the European Union through the European Neighbourhood and Partnership Instrument

• **Radio City** (The project aims at integrating artists, manufacturers, educators, entrepreneurs, and professionals of diverse backgrounds into a synergistic ecosystem. Radio City's territory is an extensive 12 hectares, which will be used – amongst others – for international festivals, exhibitions, art fairs, artists residencies, co-working spaces, creative ateliers and studios).

• **Adjara Group Atelier** — the company started working with an innovative designer Tina Kvinikadze who specialises in costume design for theatre and film. She is heading the company's in-house Atelier, which has been integral to building Adjara Group's internationally celebrated hospitality projects.

• **Arts&Culture** — Adjara Group's vast, open facilities are cultural hubs for pop-up events and public talks with internationally celebrated writers, photographers, painters, architects, and designers. Adjara Group has been supporting and collaborating with prominent film, music, and visual arts festivals held in Georgia.

Another big Georgian corporation, TBC Group, runs **Artarea TV, dedicated to CCI Art news**. Due to it, many artists became popular. It is *a consolidated platform of news happening in Georgia* (festivals, music, crafts, exhibitions, cinema, etc.).

Georgian Innovation and Technology (GITA) is a state agency that strives to create an effective system in Georgia whereby innovation and IT technology can be developed[22]. The most target groups are CCI companies.

To complete its goals effectively, the Agency prioritises investing in the development of the infrastructure needed for innovation, which has been demonstrated by the opening of tech parks, innovation centres and industrial laboratories. It also continuously strives to develop tools to support the commercialisation of innovation and technology, to achieve a high rate of internet access across the country, to provide high quality training, and incentives to encourage innovation and technology development.

> *Cultural Industries has been an integral part of the cultural history of Georgia; among the treasures left behind by ancient civilisations that are currently on displays and storages of the different museums of Georgia, and the traditions kept in of folk-art, reflect the brilliant craftsmanship and creativity of yesteryear; during the centuries this production has been a source not only of cultural pride but also of economic livelihood, exchange of ideas and creativity. Georgia's heritage includes a legacy of finely made crafts that use rich and diverse techniques for weaving, ceramic making, woodcarving, jewellery making, painting, engraving, etc.*

[22] https://gita.gov.ge/en/about

CHAPTER II

Innovation in cultural and creative industries and business-driven models

2.1. Trends in Cultural and Creative Industries

The cultural and creative industries refer to those parts of the modern economy where culture is produced and distributed through industrial means, applying the creativity of individuals and groups to the generation of original cultural products, which may have **commercial value either through direct sale to consumers or as intellectual property.**

The cultural and creative industries bring together the arts, media, and design sectors, with a focus upon convergent digital technologies and globalisation. Enabling technologies are becoming cheaper and increasingly accessible. Their availability and their easy and wide spreading are modifying working processes and roles. Governments and institutions are also pushing the phenomenon by means of multiple funding and incentive sources. It is the turn of the organisations to redesign their processes in a more sustainable and human-centric way. Indeed, the unavoidable technological transformation needs to be driven by a rethinking of the human role within the entire value chain.

Customers, familiar with the penetration of new technologies in interpersonal communication and daily life, *are increasingly demanding innovative services and products*. **That is why Customers become the main drivers of the transformation.** Relationships between manufacturers, service providers, and users are evolving rapidly, driving an important part of digital transformation (DT) adoption. While answering the new clients' needs, asking for fast reactions, and high personalisation, services, and industries have also to revise their internal organisation and embrace new paradigms in the relations between humans, as well as between humans and machines. Thus, effective involvement of workers, and customers, in rethinking businesses and processes is a central condition to putting in place a successful and sustainable digital transformation (DT). To several extents, the current COVID-19 pandemic has demonstrated how to be an additional driver of digital transformation. The containment measures imposed by many governments to implement physical distancing and reduce the spread of the virus are heavily transforming interpersonal relationships in the workplaces and require new working modalities. While most technologies are mature and ready for adoption, the imperative need to adapt to the new "normality" dictated by the global emergency might speed up their adoption by the majority, fostering novel work practices and processes.

Cultural and creative industries came into prominence as both an academic and a policy issue. Policy strategies to develop the cultural and creative industries are typically associated with expanding markets for cultural goods and services. They seek to develop these industries by promoting innovation and creativity, leading to the development of original forms of intellectual property and supporting industries based around culture and entertainment. As an academic field, interest in the cultural and creative industries has ranged across communication, media and cultural studies, economic and cultural geography, the creative and performing arts, and applied cultural economics. These industries, as an important model of bringing academic work together with cultural producers, become more prominent particularly in new industries in the digital economy. Changing market context leads to the transformation of culture and the growing precarity of creative labour.

As globalisation has led to the homogenisation of customer behaviour, the creative economy has met a slight dilution of heritage assets in society's life habits. This phenomenon was treated with importance in the last decades and a new concept was invented to support heritage asset strengthening by its importance. Culture-led regeneration has been widely accepted by European cities as an important component of urban renewal and sustainable development.

DID YOU KNOW?

As culture-led urban regeneration strategies, cultural and creative industries are positioned as an alternative to traditional manufacturing industries. Based on the case study of Liverpool, being designated as the 2008 European Capital of Culture, a study period was established (2008-2018) to track the long-term impact of the event. Liverpool's strategies for sustainable culture-led regeneration were investigated from three aspects: cultural funding dilemma, economic dilemma, and spatial dilemma. The findings revealed that incorporating events in a city's long-term regeneration trajectory, continued support, and enhancement of local cultural processes and structures. Moreover, community involvement and development were mentioned as the major factors to ensure the cultural sustainability of the event.[23]

An assessment within the HERiPRENEURSHIP Project Aria countries, showed that several cities were designated as the European Capital of Culture (see table 2.1.1.).

Table no. 2.1.1. European Capitals of Culture from Black Sea Basin project partner's countries:

YEAR	COUNTRY	CITY
1985	Greece	Athens
1997	Greece	Thessaloniki
2006	Greece	Paras
2007	Romania	Sibiu
2010	Turkey	Instanbul
2019	Bulgaria	Plovdiv
2023	Romania	Timisoara
2023	Greece	Eleusis
2032	Bulgaria	to be agreed

[23] https://www.mdpi.com/2071-1050/11/7/1869

DID YOU KNOW?

Following the success of Sibiu (Romania) in 2007, when other 14 cities have competed for the title European Capital of Culture in 2021. The city of Timisoara was declared the winner. Till 2021, 30m people from Europe will have heard about Timisoara; 90% of international visitors will have declared to return to this region for cultural/holiday/leisure purposes; 60% of people between the ages of 13 and 20 will consider returning after graduating elsewhere; 75% of university students in Timisoara will consider staying in this area if they can find a job; several partnerships will be concluded with foreign universities, there will be exchanges of students and exchanges of experience between students[24].

2.2. An outlook of COVID-19 impacts on the global CCI sector

Within every crisis, there is opportunity!

Cultural and Creative Industries are among the most hit by the COVID-19 crisis, and the pandemic witnessed a massive migration of cultural activities to online and hybrid forms. *The cultural and creative industries that are most dependent upon physical experiences at venues and sites have suffered the sharpest economic losses in relative terms, across many different national contexts.*

Covid-19 has shut down heritage sites and cultural institutions resulting in huge economic losses. Numerous artists, craftspeople, and heritage practitioners have seen how their means to earn a living have disappeared and their vulnerability augmented. The quarantine limited social relationships, isolated communities, and broadened social inequalities due to the restrictions concerning the operation of cinemas, theatres, and concert halls, the banning of live concerts and other events that usually attract a significant mass of visitors. This situation has resulted in a long period of inactivity, which, in turn, posed significant risks to their viability. In a limited period, the interest turned to online facilities instead of living participation. Those CCIs that were already engaged in digital media and tools, took advantage of the opportunity. However, the more that work pre-pandemic was office-based (eg design, advertising, publishing, games), the more financially viable it is to transition workers to remote working (as revenues are less likely to be hit by public health measures that target physical activities). Losses in revenue of cultural and creative industries in 2020 ranged between approximately 20% to 40% across different countries[25].

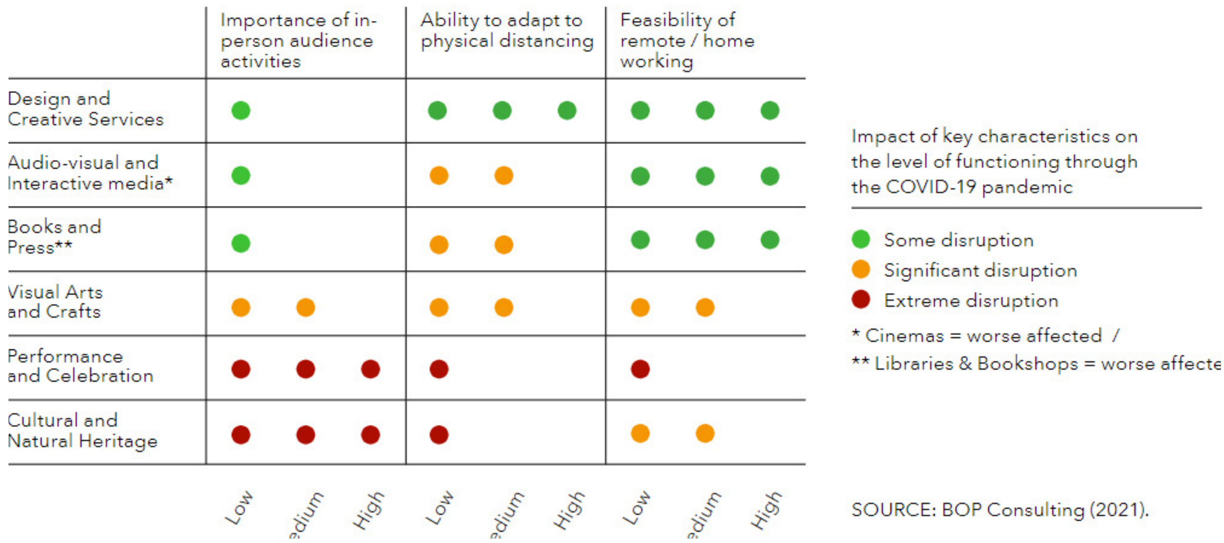
Digital adaptation has been particularly strong in the audio-visual industries. On-going restructuring is being speeded up by the pandemic as traditional pay-TV providers' popularity declines and 'over the top' streaming services continue to grow, transforming the whole value chain.

The most affected have been Performance and Celebrations activities, and Cultural and Natural Heritage related activities, followed by Visual Arts and Crafts, Books and Press, Publishing, Audio-visual and Interactive Media, and Design and Creative Services.

[24] https://www.capitalaculturala2021.ro/

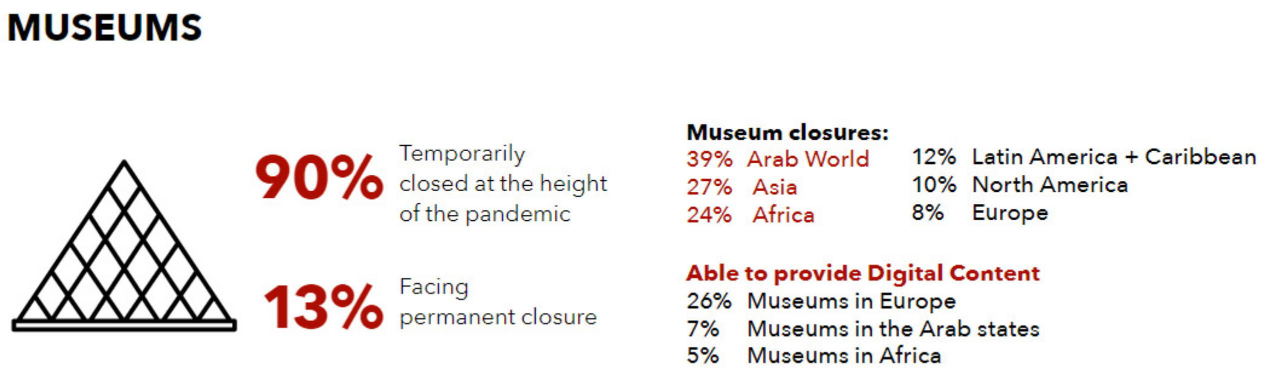
[25] Cultural and creative industries in the face of COVID-19: an economic impact outlook

Fig. 2.2.1. Key characteristics that affect the level of distruption experienced across the six cultural domains.



During the height of the pandemic, 90% of the museums were temporarily closed, and 13% were facing permanent closure. In Europe, just over a fourth (26%) can provide digital content.

Fig. 2.2.2. Museums in face of COVID-19



Source: UNESCO (2020a) based on ICOM (2020)

Table 2.2.1 CCI sector assessment after COVID-19

MUSEUMS	As the COVID-19 pandemic unfurled, museums and heritage sites across continents got either closed or welcomed far fewer, and less geographically diverse, visitors. And with travelling to and from many countries limited in 2021, virtual tours, digital exhibitions, special podcasts and even video games, emerged as alternative solutions to experiencing heritage. While professionals in the sector agree that digital cannot substitute traditional site visits, they also point to how it can offer new, complimentary benefits. Across the world major national museums and heritage sites, including The Metropolitan Museum in New York, The Front Palace in Bangkok, and The National Museum of Modern and Contemporary Art in Seoul, to name a few, had already started rolling out virtual tours well before the pandemic, and their communications teams are working hard to encourage audiences to try these out.

PERFORMING ARTS AND MUSIC	Bans on gatherings in large groups and social distancing measures mean that huge numbers of public-facing, live performances and cultural parades have been postponed since the pandemic started. Nevertheless, cultural organisations across the world have been working around the clock to continue to bring life and creative expression into people's homes through alternative, digital ways.
VISUAL ARTS	Largely relying on big events, fairs, biennales and gallery visits, the international Visual Art and Craft market was hit hard by the pandemic, but quickly moved to digital to offset the blow and grow resilience. The sector is transforming rapidly as a result: social media is now ranked as the sector's third most important sales channel. According to insiders, these trends are not just temporary responses to the pandemic, but they are actually here to stay as effective complementary ways to deepen interest and interaction in the sector in novel ways and keep art and design lovers engaged all year roundand gallery visits, the international Visual Art and Craft market was hit hard by the pandemic, but quickly moved to digital to offset the blow and grow resilience. The sector is transforming rapidly as a result: social media is now ranked as the sector's third most important sales channel. According to insiders, **these trends are not just temporary responses to the pandemic, but they are actually here to stay as effective complementary ways to deepen interest and interaction in the sector in novel ways and keep art and design lovers engaged all year round.**
BOOKS	With the rise of e-books and commercial digital platforms, independent bookshops and libraries have long faced big challenges. Yet the restrictions imposed by lockdowns have exacerbated these to the extent of triggering strong reactions in the sub-sector, which may lead to new models and positive changes in the medium to long term
AUDIO-VISUAL AND INTERACTIVE MEDIA	Many factors led to the downfall of the film industry in 2020. Meanwhile, streaming services became household necessities during the pandemic. Cinemas continue to reinvent themselves and deliver state-of-the-art experiences. Their massive investments in innovation – both inside and outside of the screening room – to offer the very best big screen experience and customer journey to cinemagoers in theatres large and small have contributed to growing box office results in recent decades. Furthermore, the sector continues to improve access to cinema for all, as digitisation has facilitated the greater use of subtitling and audio-description technologies for deaf and visually impaired customers inside the screening room.[26]

As the pandemic triggered the digitisation of culture, new challenges are posing to the diversity of cultural expressions with amplified gaps in access, creation, and remuneration.

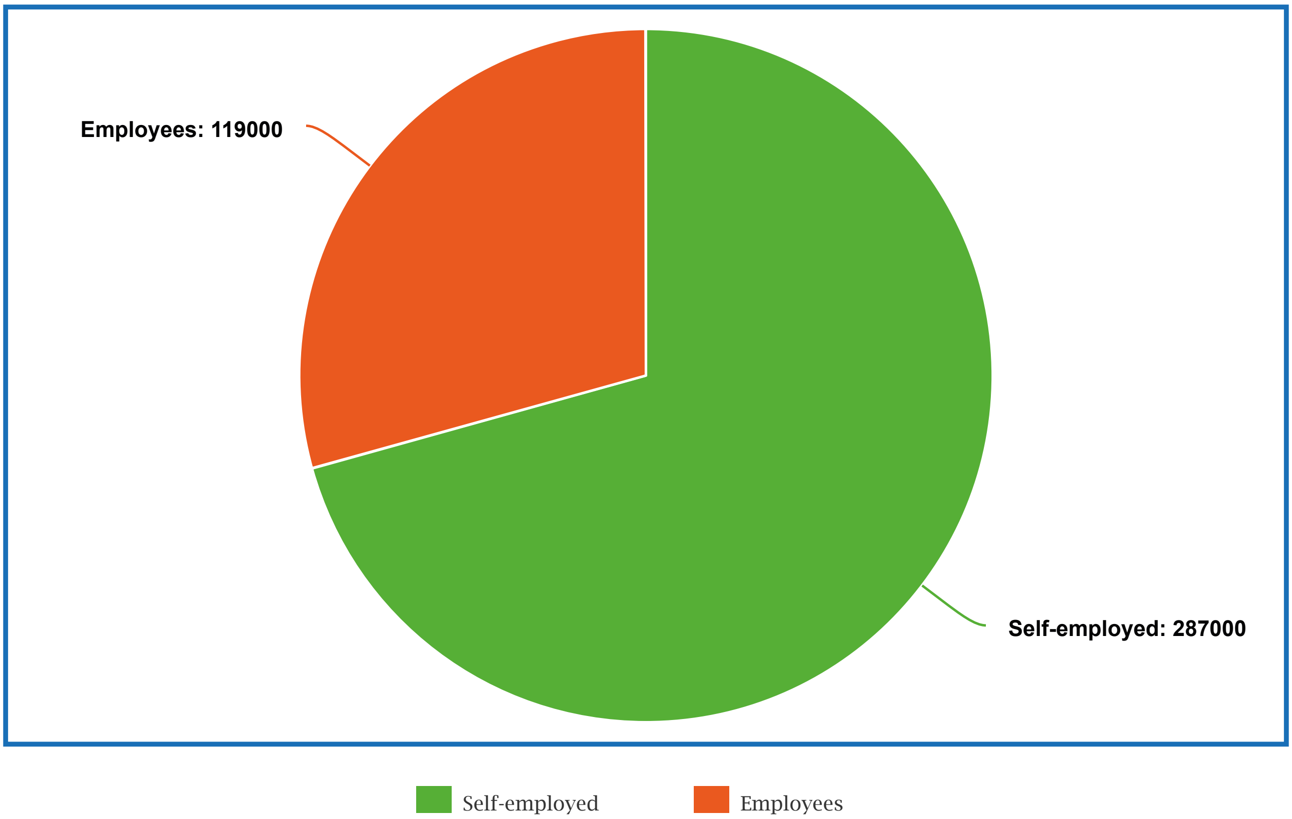
[26] Annual Report 2022, International Union of Cinema

The impact on jobs in the cultural and creative industries resulted in job losses due to the fall in economic output. Some of the cultural sectors in which physical audience/ visitor activities at venues and sites are prevalent and remote working is less feasible (eg: Performance and Celebration and Cultural and Natural Heritage) have suffered big economic losses. The CCIs employees who lost their jobs needed to seek employment in other sectors or exit the labour market entirely.

Freelancers and the self-employed have been hit the hardest by the COVID-19 pandemic within the cultural and creative workforce.

Faced with the magnitude of the impact of COVID-19 on the cultural and creative industries, of which the estimates in terms of lost revenue and jobs are only one facet, the intensification of the consumption and production of digital cultural content, **mainly as a result of the impossibility of congregating and occupying physical cultural spaces during the pandemic, is one of the most widespread adaptations in their sector,** both among its audience and among its producers. **Interactive media (eg computer games, social media) and the wider audio-visual industries (eg film, TV, recorded music) have again fared better in terms of the shift to digital than other domains and sub-sectors.**

Fig. 2.2.3. Estimated job losses in the face of Covid-19



Source: Oxford Economics (2020)

2.3. Changes in travel demand, cultural consumption, and new opportunities for CCI businesses

The world tourism industry is undergoing changes. It should be noted that demographic, technological and lifestyle changes are significantly disrupting the tourism industry. Tourism businesses and tourist destinations need to constantly adapt and innovate to ensure continuity and sustainable growth.

Among the major trends in consumer demand is the growth of new ways of travel: experience tourism, cultural and gastronomic tourism, rural tourism and agritourism, as well as redefining health tourism, create new opportunities for the cultural and creative sector. In addition to the growing demand for active and specialised themed travel experiences, tourists are increasingly looking for less crowded destinations with a well-preserved distinctive culture and unaltered rural and natural landscapes. "Over-tourism" (excessive tourism), or the increased interest of tourists for more developed popular tourist destinations, decreases the value of the visitors' experience.

A new trend, "under-tourism" (underdeveloped tourism), causes visitors to choose lesser-known destinations, which offer the feeling of discovery and authentic travel experiences. The Project Area countries are well placed to meet this new demand. There is a big potential to develop the CCI sector in PA countries, by shaping their offers according to the new consumption trends.

— Changing travel preferences

Today's tourists don't want to be insulated from the places they visit inside a cultural bubble. They want to engage with and participate in the local culture. From enjoying local cuisine to celebrating regional festivals and holidays, local experiences are set to become some of the top tourist trends to watch. One example of a popular local experience would be visiting a country during a major festival, renting traditional clothes to wear, consuming local delicacies, and engaging in games or cultural activities. Another might be a long stay with a host family in the destination country to learn more about the local culture.

Experiential tourism engages more local businesses. Travel for adventure tourism and cultural tourism make tourists spend more on cultural experiences. A study conducted in 2017 by Adventure Travel Trade Association found *that 65% of travel expenses remain in the destination for active and experienced travel*, as opposed to more traditional forms of tourism, estimated that only 12-18% of the revenue stays in the country.[27]

The PA countries have the opportunity not only to attract visitors who can afford higher expenses, but also to keep a larger share of tourism spending in the host local communities.

[27] Pulse Study 2017 of Adventure Travel Trade Association Adventure

Slow tourism

With slow tourism, visitors experience the destination in different ways. One is interested in gastronomy tours with involvement in the food preparation process, another one might be interested in learning how to make pottery, or enjoy a walk into the woods, a week in a rural area, etc. **These changes in customer preferences become more revealed. Therefore, new opportunities for CCI businesses emerge to complement the tourism value chain.**

Solo Travel

Leisure travel used to be a family affair or something that couples undertook together. While that's still the case for many, more and more people are choosing to strike out on their own. Enjoying a solo trip is no longer so unusual and tourist trends increasingly reflect this.

This trend may encourage CCIs to respond to market needs and better focus on specific interests (for example, personal culture discovery experiences). This strategy allows targeting cultural products instead of considering a wide range of preferences in a family or a group.

Eco travel

Tourism trends are influenced by the concerns of the customer base. The new generation ideals drive their purchasing decisions and create new tourism trends. Eco travel is just one example of these tourism trends, reflecting a growing concern among today's traveller for ethical and sustainable tourism options. Eco travel includes simple changes, such as the availability of carbon credits when booking a flight or the possibility to rent an electric car instead of a conventional vehicle. More sophisticated examples might include tourism with a volunteering element, perhaps working on a nature reserve, or engaging in conservation work of a historical building.

Nowadays consumers expect experiences that closely match their personal preferences, from destination services to accommodation and the type of activities they will be involved in. It is needed to design an experience tailored to clients' desires and expectations.

CCIs from PA countries shall consider the personal values of target group and to highlight in their offer specific aspects of the tourist experience (for example, eco-transportation by using bikes as a local means of transportation).

— Short trips are becoming more popular at regional level

Another change in consumer demand is the increased number of short trips. These accounted for 57.8% of the tourist trips undertaken by EU residents in 2018.[28]

In Europe, the share of urban tourism has doubled compared to other forms of tourism, the top urban destinations, reaching an average growth rate between 2012 and 2018 of 7.5%, compared to 4.7% for other forms of tourism.[29] European practices can be extended in Black Sea Basin area, where cities and towns are promoted increasingly as Capitals of Culture. This caused a redesign in occasional travel trips (business, health)

[28] Eurostat tourism statistics - characteristics of tourist trips 2019

[29] European-cities-marketing-benchmarking-report-2018

as well. An increasing number of business travellers are choosing to extend their stays to include some leisure activities. More than 60% of business trips were extended to leisure trips in 2017, an increase of 40% year to year. In this regard, the PA countries should follow this trend and facilitate creation of market experiences in this niche. The CCI sector shall benefit from occasionally in-coming customers and adapt accordingly to their needs.

— Shift from international to local

The various travel restrictions and the reluctance of many people to travel abroad have made many in the tourism industry focus on local customers rather than international ones.

With hotels, it could be best to highlight the kinds of facilities that may appeal to the local market, such as your restaurant, your gym facilities, your Wi-Fi and even the fact that your hotel rooms are ideal for remote work. Airlines and tourism management companies may also need to shift gears and prioritise domestic tourists.

The CCI sector can benefit from better deals with local businesses in organising cultural events in conference rooms or public spaces that are usually rented by international customers.

The tourism sector facilitates the exchange between different cultures and business sectors and motivates the introduction of digitalisation and technology in the sector. Therefore, all actors shall follow digital transformation and develop permanently new practices and stay tuned with highly evolving customer demand.

2.4. Unlocking the innovative potential of cultural and creative industries

Nowadays, creativity and entrepreneurship are seen as essential components of the economy. Creativity lets an entrepreneur connect distinct aspects and extrapolate feasible solutions over unrelated concepts.

‘Creative people are naturally interested in new possibilities, technologies, and everything new. They are looking for new solutions. Creativity and education are part of progress. As people learn, progress and technology must use creativity, find new solutions, and look at things differently. It is not just the artists and the designer who has to be creative, but anyone can be creative — even an official, if he/she finds a new solution that will help make the system more efficient.’ [30]

Creativity is slowly turning out to be one of the best ways to alleviate problems plaguing today’s enterprises. Problem-solving works best when coupled with highly disciplined and focused thinking. A successful combination of creativity and entrepreneurship led to innovation.

[30] Blockchain and 3D printing as technologies for a sustainable future | Creative Industry Košice (cike.sk)

’Creativity is a quality, a person’s ability. Innovation is a product that is created, delivered to the market, and has its customers. For innovation — the final and functional product — to work, we need creativity. So now that I have clarified it, the ratio is 30:70, creativity and innovation, respectively. Thus, creativity is not the biggest force. The essential element of innovation is a well-defined problem, and there we need to be analytical. Many companies are a bit wrong when they bring many creative minds into one room and let them be creative. In the first phase, we need analysts who know how to identify the right problem from a lot of data. Only then do the creatives come in, looking for a variety of solutions to a well-defined problem. It is said that there is a limit to the number of problems and no limit to the number of solutions. But success requires a good identification of the problem.’[31]

Interview with an expert on innovation, Jan Uriga, on 8th of March 2021, by Natália Centková

Innovation is always the subject of change driven by creative initiatives. Innovation is always the subject of change driven by creative initiatives. The innovator Jan Uriga, sees technology as a partner in innovation processes:

’If you want to go fast, go alone. If you want to go far, you always have to go with someone. Technology is a partner for you to go far. Let us maintain respect for technology because it is to become our partner, our servant, but not our master. Therefore, we should not underestimate the process of choosing the right technology to implement.’[32]

Interview with the innovator Jan Uriga, on 8th of March 2021, by Natália Centková

The PwC consulting firm, through various factor and simulation analyses and experiments on technologies that are changing the world, found out which technologies have the most significant impact on efficiency. They picked eight essential technologies that can help companies make the biggest impact: 3D printing, virtual reality, robotics, Internet of Things (IoT), artificial intelligence (AI), augmented reality (AR), blockchain, and drones. If today’s companies reasonably consider introducing these eight essential technologies, they can accelerate their businesses.

[31] Innovation in times of crisis. Can sustainability and creativity be the way forward? | Creative Industry Košice(cike.sk)

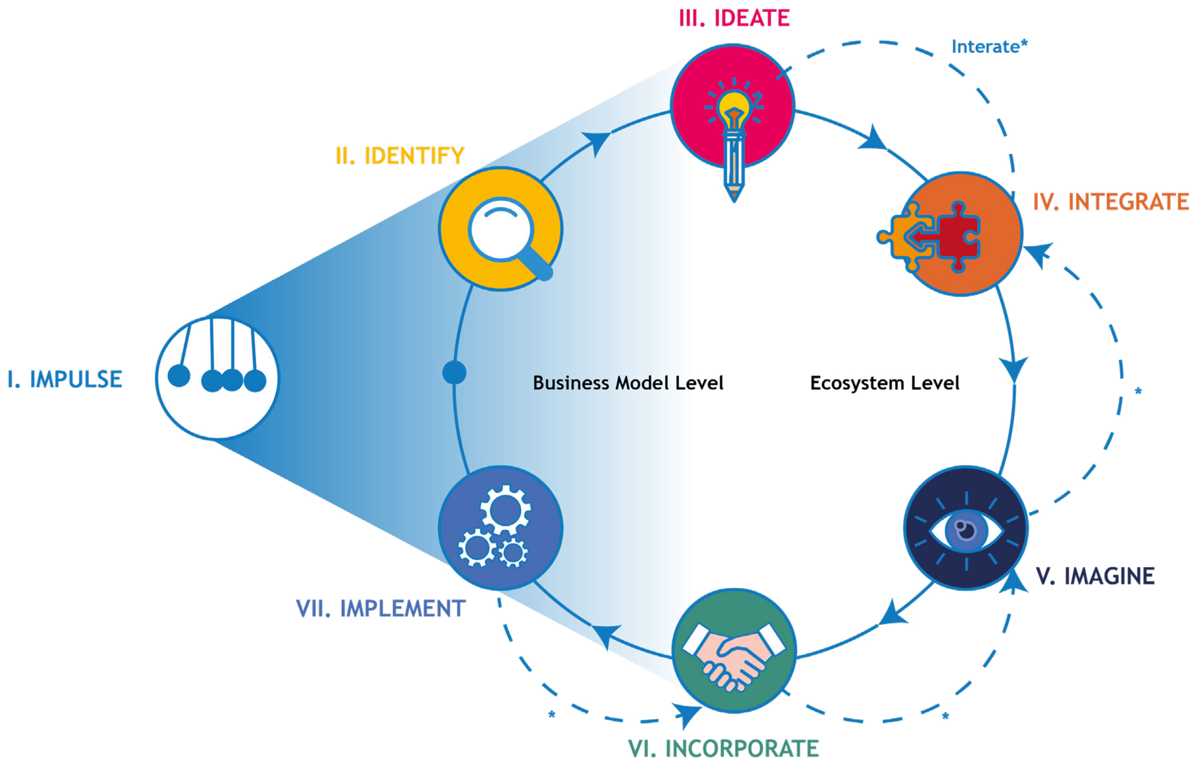
[32] Technologies for a sustainable future and their adoption in business | Creative Industry Košice (cike.sk)

3D printing	• 3D printing has become an extremely disruptive force in the manufacturing world, • 3D printing is even breaking design barriers in the culinary arts. Using a plastic 3D printer, users can print chocolate based on a digital design from 3D software, • 3D printing is used for production of musical instruments: violins, flutes, banjos and more. At Sweden's Lund University, the first ever live concert featuring all 3D printed instruments has taken place, and the show was a success, • 3D Modelling and Printing Game Characters.
Virtual Reality (VR)	VR describes a computer-generated environment that someone can explore and interact with. From healthcare to real estate, education, tourism, interior design, gambling, advertising, art and design, recreation and cultural activities, and a lot more industries use VR.
Robotics	These artworks propose different models of interaction in robotic art that account for the dynamic and temporal aspects of drawing and evidence how artists and machines can work collaboratively and creatively in ways that are not predetermined. International experience shows different models of interaction of cultural sector and robotics, where the performing and visual arts open up new pathways for robotics and embodied interaction.
Internet of Things (IoT)	Smart city concept has generated technologies with the focus on environmental monitoring and cultural heritage. IoT-based system that combines three aspects: monitoring, predictive maintenance, and decision-making related to interventions to be implemented to preserve buildings belonging to Cultural Heritage. As well as integrating Metadata across Museums, Archives, and Libraries made possible cultural assets universally accessible: https://artsandculture.google.com.
Artificial Intelligence (AI)	AI challenges the creative value-chain in two ways: shifting services performed by humans to algorithms and empowering the individual creator. Good practices in AI for cultural heritage accessibility show that creation of datasets of cultural artefacts that could be made accessible to a larger audience.
Augmented Reality (AR)	AR and mixed reality (MR) are being used to enhance the museum experience and engage visitors with content in new, innovative ways.

Drones	Drones provide unprecedented advantages in some fields such as aerial photography, filming and aerial inspections, where they have become almost irreplaceable, partly because they involve dramatic cost reductions compared to traditional solutions. Drones equipped with cameras and other sensors are ideal for gathering images and other information from inaccessible locations. In fact, most civil drone applications currently centre on aerial photography and filming. Recently, other drone uses, including transporting objects, logistics and precision agriculture, have begun to attract significant attention and are starting to be exploited.
Blockchain	In the creative economy, blockchain can redefine how artists are remunerated by acting as a platform for creators of intellectual property to receive value for their work. Blockchain can solve problems in CCI by the following: 1. Blockchains can host smart contracts to help artists manage digital rights and allocate revenue shares to contributors to the creative process. 2. Services such as Ascribe.io offer to attribute ownership of creative works securely. The service works by providing each creative work with a unique cryptographic ID, verified with the blockchain. This means ownership can be traced and creative content securely shared. 3. Creative content can be mispriced. By tracking the demand for creative content, pricing could be more dynamic. Prices for creative content could fluctuate according to supply and demand. Moreover, artists could control and set prices themselves without having to go through a complex web of intermediaries. 4. Digital music stores such as iTunes allow consumers to purchase individual song tracks. Using blockchain, snippets of creative works could be made available for a price, for example, a few seconds of a song for use in a movie trailer. This kind of micro metering works by having the blockchain record the precise components of the creative work that were used, defining the smallest consumable unit of creative content. 5. Blockchain can help link reputations to specific addresses on the blockchain, thus allowing both producers and consumers of creative content to verify one another. This could encourage stronger collaboration and better behaviour, by promoting cooperative terms for content creators and consumers alike.

The above-mentioned examples should not be seen as an individual deployment of the specific technology, but as an innovative convergence of combined technologies. A relevant example is the combination of AI, IoT, and blockchain for use in the automated trust concepts, where the trust in the product you are buying is going through a transparent, verifiable, and traceable track.

2.5. Business-driven models in the cultural and creative industry



The study Io sono cultura, Symbola, 2018 analyses the Cultural and Creative Productive System as the set of productive activities that contribute to generating economic value and employment. Cultural industries are associated with traditional sectors such as cultural heritage, visual and performing arts, publishing, music, cinema, radio, television, print and photography, while the creative industry category begins to include the new sector of the digital economy such as software and IT services.

They are partly related to the cultural and creative sector stricto sensu (core) and partly to activities that, although not being part of the supply chain, they use content and cultural skills to increase the value of their products (creativity-driven). This approach is close to a new idea of culture, more modern and international, which goes beyond the old conceptualisation that focuses only on the conservation and enhancement of the historical and artistic heritage and adds a series of supply chains oriented to the creation and production of cultural content.

To this new cultural conceptualisation, the creativity-driven dimension is added, finding economic activities not belonging to the core cultural, but directed to embed culture into innovative processes. A representative scheme is presented below:

CORE CULTURE	Activities of preservation and enhancement of historical and artistic heritage	Museums, libraries, archives, monuments
	Non-reproducible activities of cultural goods and services, defined as performing arts and visual arts, synthesised with everything that revolves around live shows	Performing arts, theatres, concerts, events etc.
	Activities related to the production of cultural goods and services according to the logic of industrial repeatability, defined as cultural industries	Film and media, music, video games and software, publishing and printing
	Creative industries related to the world of services	Advertising, communication, architecture and design, crafts.
CREATIVE DRIVEN	Activities that use cultural and creative content and skills to increase the value of their products related to other industries (eg fashion, furniture, agribusiness etc.)	• digitalisation • gamification • automation • content creation • product promotion

United Nations Conference on Trade and Development has distinguished a classification based on 6 types of creative outputs about 10 industrial categories:

10 SECTORS	6 TYPES OF CREATIVE OUTPUTS
• Advertising • Architecture • TV and radio • Design and fashion • Movies and videos - Interactive media (games, web, mobile) • Museums, galleries, and cultural heritage • Music • Visual arts (included handcrafts) • Writing, publishing and mass-media	1. Original and creative goods 2. Creative contents 3. Creative experiences 4. Creative services 5. Creative simple goods 6. Creative complex good

The intersection between sectors and professions allows us to quantify the cultural contamination process, namely the number and the intensity of the companies or professionals that carry out cultural and creative functions outside the Core sectors and that, therefore, contribute to feeding the cultural and creative capital.

Cultural contamination process arises from the need of transformation, and hereby we distinguish two categories of business-driven models:

1. **digital transformation models** aiming to increase CCI market competitiveness,
2. **creatively driven models** aiming to increase the value of products related to CCI or other industries.

International experience shows that culture and creative industry assure transition from traditional form of activity to digital and meta environment. These models help the business sector to respond faster to new arising customer demand and offer more sustainable goods on the market.

1. Digital transformation models can innovate using the formulas:

CORE CULTURE		GAMES AND IT SECTOR
Advertising and Publishing Audiovisual Performing Arts GLAM Sector (galleries, libraries, archives, and museums) Design Visual Arts and fine crafts Culture and heritage Specialty foods Literary arts	+	3D printing VR Robotics Internet of things (IoT) AI Augmented reality (AR) Blockchain Drones

Creatively-driven models can inspire local businesses and help innovate added value products by exploring formulas:

CCI SECTORS		OTHER INDUSTRY		
ITC Sector Advertising and Publishing Audiovisual Performing Arts GLAM Sector (galleries, libraries, archives, and museums) Design Visual arts and fine crafts Culture and heritage Specialty foods Literary arts	+	Agriculture HoReCa Tourism Fashion Manufacturing Body and mind health	=	**Added-value products**

National Endowment for Science, Technology and the Arts conceptualises a classification based on 4 business models related to cultural and creative processes:

Creative service providers	Business model based on exploitation of skilled human capital who apply intellectual property (IP). Examples: advertising agencies, design consultants, architecture, PR, etc
Creative content producers	Business model aiming to manage resources to produce intellectual property (IP). They usually copyright the outputs before they are distributed to consumers: theatre companies, publishers, video game developers, record and film companies, fashion designers, television and radio broadcasts, etc.
Suppliers of creative experiences	Business model who sells to consumers the right to attend a specific performance or activity (creative product): theatre companies, managers of musical performances, artistic-cultural activities, tourist and sporting events.
Manufacturers of original creative goods	Business model with a high exclusivity and authenticity. It involves creation and/or sale of artefacts or manufacture with creative value: visual arts and crafts, antiques, writing, design creation, photography, etc.

To understand the value and multiple impacts of cultural and creative sectors, it is necessary to detect where the phenomena of interest "occur" in daily reality. When it comes to creation of new kinds of joint offerings in a creative economy, an approach should be taken into consideration: capitalisation of any form of heritage patrimony will be considered their competitive advantage on the global or regional market. According to that, CCI sectors may be considered as trend creators in the culture consumption market and have a big influence on the tourism value chain.PA countries should adopt this approach and rethink their ideas about capitalisation of their local heritage. By transforming them into a business-driven model, they will improve their creative economy outputs and become more sustainable.

CHAPTER III

Demand in Qualification System for Cultural and Creative Industries

3.1. General assessment of the qualifications system

The most important factor driving the change in the labour market is digital transformation. The global labour market is highly influenced by robots, digital technologies and computer-controlled machines which are replacing human labour. This phenomenon relates to the automation of existing jobs. Due to that, people will lose their jobs to robots and automation, but new opportunities will appear leading to new jobs with higher labour productivity.

On the other hand, digital transformation has positive impacts on the labour market: new fields of work and new occupations appear due to rapid digital transformation. Consequently, these changes involve upgrading skills and acquiring new skills of the present labour force. It is predicted that the demand for basic cognitive and physical skills will decrease while the demand for high level cognitive, social, and technological skills will increase due to automation.

The importance of creativity in addressing the digital economy is increasing day by day. Therefore, creative skills and technical skills become more demanded. Despite that computer-controlled equipment capacity to mimic human labour is very high, they can't replace human labour in occupations where creativity and expertise are necessary. Furthermore, computers have supplementary roles in making creative skills more efficient in many occupations closely related to advancing technologies. For example, musicians can develop their work in creative ways with computers, architects can make their designs more detailed and faster by using 3D) printers to provide prototypes for their clients, and dancers can perform globally with virtual reality technology.

PA countries face several challenges in the Cultural and Creative Industries Qualification System:

- **Lack of qualified professionals because of limited education opportunities**

A major problem in the field of creative industries is related to the qualified human resource, which is widely demanded in the private sector but is lacking in the study programmes of universities, which still lack teachers who could help students develop the necessary skills in using new media technologies.

Individuals within the creative and cultural industries are much more likely to have at least one degree than across employment in general, and yet the rate of skill gaps is significant. Employers in the industry state that the higher education system is not fit for purpose; supposedly highly qualified graduates are not entering the sector 'job-ready', and thus need to acquire further skills. In considering this further, it should be noted that the role of higher education is not specifically to provide 'job-ready' employees and so employer expectations need to be managed.

Employers are also responsible for ensuring appropriate training is available to new entrants, whether or not they are graduates. This tends to happen either on the job or through ongoing training opportunities, but creative and cultural businesses struggle to access funding to engage in this training. Employers may also be placing too much emphasis on graduate recruitment instead of focusing more specifically on recruiting individuals with the right skill sets.

• Small businesses experience skill fusion and limits the workforce development

Skill fusion is a common phenomenon in many small businesses. For example, one or two individuals are required to perform a variety of different roles in the organisation, such as fundraising and programming. Many employees take on management and business-related responsibilities, which are not in their areas of expertise. As such, administration skills suffer from as much of a skills gap as technical skills. Businesses in the creative and cultural industries do not tend to think strategically regarding current and future skills needs and/or potential economic change. Many will access training only as and when immediate needs arise, as opposed to planning staff development in advance of upcoming business requirements. This is often exacerbated by the limited time and finances available to engage actively in sustained workforce development.

There is an important job to be done to raise Government and Employer awareness of the benefits of qualifications and training, as well as ensuring this is fit for purpose in responding to employer needs.

▫ The skill set demanded on the market is complex and requires continuous training

Technical or artistic skills are not enough for young professionals to thrive, develop projects and start enterprises in the global market. **Moreover, creativity and innovation are now being recognised as essential skills in other professions. Cultural Creative Industry sectors have been impacted by the growth of digital media, globalisation, cross-border and cross-cultural collaboration.** This creates a need for strategic and relational skills that deal with working in plural and multi-layered markets.

Creative professionals need strategic, management and communications skills. Strategic skills rationalise the ways projects, businesses and careers are conceived and managed. A professional today has to be a creator, a manager, a researcher, a public relations specialist, and a polyglot. All creatives need skills in how to negotiate, lead and discuss ideas, objectives, and plans with their business partners. Professionals have to be permanently on top of their game, otherwise they risk losing contracts, schedules, deadlines, contacts, and partners. Time management is fundamental especially when joint research and reflection are needed for a project, which is under pressure to produce outputs. Professionals have to reinforce their communication skills to overcome the obstacles caused by a lack of time, trust and mutual knowledge in non-hierarchical, multilingual and multi-sectoral temporary teams. **The need for continuous training increases considering this more demanding and competitive market.** Alternative educational and training projects could fill the gaps and respond to these new needs. The challenge consists of how to integrate these new learning methods into the educational and training systems' official mainstream offer and how to engage different stakeholders to take up active roles in this development.

Therefore, all levels of education need to integrate culture and creativity into their courses and develop creative skills and cultural practice from early childhood. Lifelong learning needs to be promoted and teaching standards improved for pre-school to higher education, formal and non-formal institutions.

3.2. Demand-led qualifications analysis

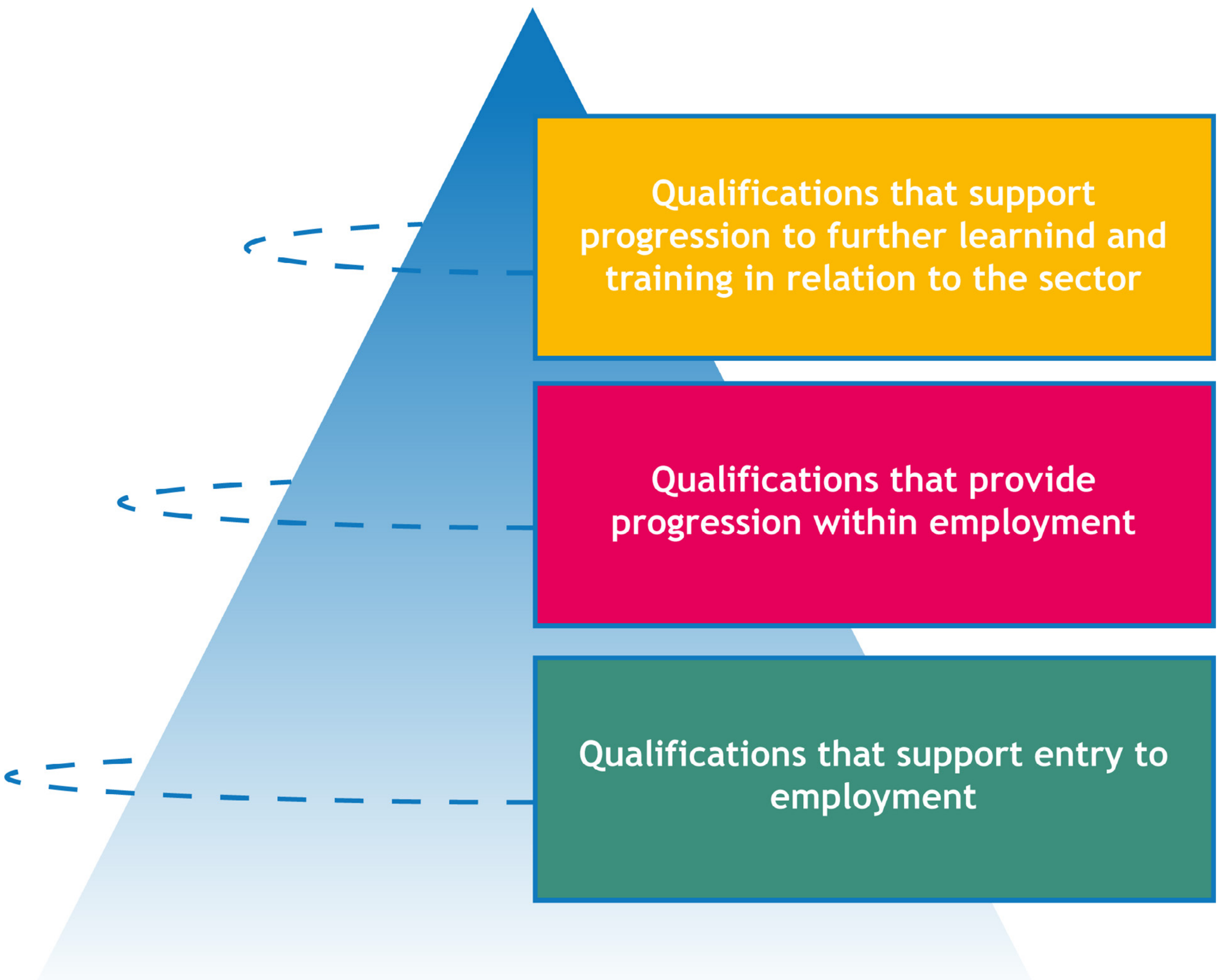
The QUALIFICATIONS BLUEPRINT FOR THE CULTURAL AND CREATIVE INDUSTRIES IN THE BLACK SEA BASIN aims to deliver demand-led, coherent, flexible, and fit for purpose qualifications, that are responsive to current and future industry needs, and which will enable the creative and cultural industries achieve their economic potential, through relevant skills and training.

The demand for Creative and Cultural Skills can be described in line with three evolving categories:

• Qualifications that support entry to employment – the formal education system;

• Qualifications that provide progression within employment – on the job training;

• Qualifications that support progression to further learning and training in relation to the sector – self-education.



- **Qualifications that support entry to employment**

At entry level professionals can enter the market based on technical and soft skills they can contribute to the team.

Aldo di Russo, Project External Expert, during one interview mentioned that *‘young professionals can acquire any of the technical skills they need, but first, they need to develop their soft skills, which is a long process. The skills that are lacking in nowadays practice are imagination, abstract thinking, and creative thinking. Those are mostly needed to use cultural heritage in nowadays creative outputs. Creativity, imagination, and abstract thinking help us look through a wider angle.’*

Technical skills	Soft skills
Technical skills will be developed according to the technical tools needed for production.	- Imagination - Abstract thinking - Creative thinking

Most employers tend to use higher level qualifications (eg degrees) at entry level in most sectors as Diploma in Foundation Studies – Art and Design, and Graded Examinations in the Performing arts sector. In some sectors (eg craft), skills and training do not follow a straightforward trajectory from school age learning through to Higher Education.

The Black Sea Programme is co-financed by the European Union through the European Neighbourhood and Partnership Instrument

Instead, practitioners commonly build skills throughout their careers, undertaking courses and qualifications in response to skills needs that might, in some cases, be at a lower level than qualifications they have already achieved. This allows individuals more freedom to achieve relevant qualifications to meet specific skills needs as their careers progress, rather than placing too much emphasis on qualification level. In very specialist areas (eg actors, dancers) employers state that they prefer graduates from a preferred list of specialist courses, and in the classical (subsidised) music sector, qualifications gained at a small list of conservatoires are preferred. In art and design, art school graduates are preferred, and although they have higher-level qualifications, progression or further qualification development is usually linked to portfolios and experience. These preferences will continue to be supported.

Employers need to be more creative during employment interviews and potential employees need to be more aware of qualifications demand and soft skills needed.

Examining UNESCO data about formal education analysis in PA countries (see annexes 1), it can be noticed that only Bulgaria and Turkey have early vocational education (starting at 10-12 years). This represents an opportunity for the young generation to learn about culture and to grow up within a creative environment as part of their secondary general education. In other countries, vocational education is only offered at a later stage.

Parents of the new generation should encourage young talents to connect with the culture and develop from an early age: fundamental soft skills (creativity, imagination, abstract thinking, etc.), which help individuals to form a unique personality.

▫ Qualifications that provide progression within employment

CCI employers and practitioners identified the priority areas within skills needs which are essential to businesses and market development. A shortage in specific skills, defined as gaps of competencies, was highlighted, where employers are facing a need within their current workforce, or where sole professionals/entrepreneurs have themselves identified areas where they need to train. This gap was determined by digitalisation process in every business sector, automatisation of production, selling processes or shift to online promotion channels.

Basic product creating skills	Basic Content creating skills
- manual labour, using old/traditional style skills - skills related to the traditional recipe/technology - skills related to the specific innovative technology, which highlights a new trend in creative industries	- storytelling - copywriting

'Build what has been demolished, start designing digital tools with their internal history, a specific grammar, forms, and articulations of the forms built for the medium to be used. It is important to design the scene not to take a theatrical scenography as if it were a set, but to reconfigure those same elements concerning the meta-history of that story, of that place, of that piece. At the same time, it is necessary to implement and give space to the professionals that can construct this building. Places of culture, archives, and artists have the responsibility to understand that it is a question of managing the coexistence of two worlds that are both present and alert; only in this way will they be able to claim an industrial role and positioning. We need to train companies and associations of digital designers, directors, scriptwriters and set designers who understand the medium and its potential, and producers who know how to invest in a market without geographical boundaries. The places and institutions of culture will discover the practical convenience, as well as the moral obligation, of participating and making available attractive content to the world. Cultural tourism will have its gymnasium to build reality based on fantasy, a true scent resulting from imagination, and the taste of an encounter with another whose roots are recognised. There is no shortage of portals through which to enjoy the media, less so if there is a lack of specific content suitable for building new cognitive experiences in a digital environment.'

Aldo di Russo, Multimedia Creator

The gap of in-house needed skills can be expanded by means of vocational qualifications. Vocational qualifications offer a means to develop knowledge alongside workplace experience and practical skills and may offer a more appropriate entry route to particular roles. Increasing understanding of needed qualifications could support a shift from the current over-reliance on degrees as an entry route to the sector. Therefore, high quality information, advice and guidance is required facing the demand led-qualification.

Considering the demand-led qualifications in the PA countries, CCI businesses need to acquire the basic skills through their teams or to externalise some functions to other related industries (for example ITC sector or Digital Marketing). This approach supports the need for rationalisation of qualifications depending on market context, customer approach, and size of the business.

▫ Qualifications that support progression to further learning and training in relation to the sector

Contemporary artists work in a globally influenced, culturally diverse, and technologically advancing world. Their art is a dynamic combination of materials, methods, concepts, and subjects that continue the challenging of boundaries that was already well underway in the 20th century.

Contemporary art is part of a cultural dialogue that concerns larger contextual frameworks such as personal and cultural identity, family, community, and nationality.

Qualifications that support progression to further learning and training in relation to the sector describes life-long skills improvement and professional self-development.

▫ Industry-focused vocational qualifications

Industry-focused vocational qualifications in CCI imply competition within the national or/and international markets. The international experience of an artist or a professional always makes a difference in his/her level of performance. The worldwide or regional recognised awards facilitate the access of the individual to the international standards or opportunity to prove their creativity through internationally recognised tools.

RSL Awards is a specialised contemporary art awarding body, currently operates in over 45 countries, certificating over 80,000 learners each year.

RSL Awards teams work to create engaging vocational qualifications that reflect the changing demands of the creative industries, with an ongoing commitment to motivate and support teachers and learners alike. RSL advocates an open-access approach to qualifications, providing a range of syllabuses, designed to accommodate a wide variety of candidates of different ages, experiences and levels of achievement.

▫ Vocational qualifications

When studying for vocational qualifications in creative subjects, the key focus should be on the application and development of creativity. This allows the learner to have a vocationally-relevant experience whilst studying for a qualification with the rigour and recognition of other qualifications in schools, colleges and training providers.

Creative practitioners	Learners registered on these qualifications undertake a journey of development in conjunction with expert mentors, from self and market analysis to brand development and presentation to the industry, whatever a learner's aspiration they can develop a strategy to achieve their goal. These qualifications have been completed by international music stars such as Ed Sheeran & Jess Glynne but have also produced successful band managers, label owners and renowned producers.
Music practitioners qualifications (Level 1-3)	Music practitioners qualifications are designed to provide a vocationally-relevant education in contemporary music, aimed at beginners through to semi-professionals.
Creative and performing arts qualifications	Dancers, actors, musical theatre performers and technicians can acquire these qualifications covering a variety of sectors within the performing arts industry. These allow learners to put their talent at the forefront.
Creative Digital Media	Creative Digital Media qualifications build on the successful model of unit choice, up-to-date assessment practice, and rely on industry professionals for the creation and review of all content.

Creative Music industry	Vocational Qualifications in the Creative Music Industry are designed to be a current reflection of the sector, offering 160+ units in diverse disciplines, suited to the kind of portfolio careers which predominate in the music industry.
Creative Industries practitioners	This suite of qualifications has been designed to encourage the development of skills and self-reflection needed to navigate a unique and varied route through a complex landscape of careers. The qualifications have been designed to adapt to any areas of the creative industries, be that Music, Performing Arts, Digital Media, or Business.
Creative Art and Design qualifications	Core units in the Art and Design pathway include 2D Art and Design, 3D Art and Design and Collaborative Project. The Fashion pathway also includes the Collaborative Project unit alongside other core units in Visual Research & Development and Garment Production. There are also a range of optional units from Digital Graphics to Portfolio Development and Found Sound to Ethics and Sustainability.
Training Providers	Qualifications which can suit all types of delivery from small qualifications at Level 1 through to full-time provision at Level 4. **Training Providers qualifications may be of high interest to teachers and mentors from PA countries, because this may contribute to the knowledge transfer, representing an important stakeholder in skills development in Cultural and Creative Industries.**

Performing Arts Awards (PAA)

Performing Arts Awards are graded examinations in Musical Theatre, Acting, Screen Acting, Jazz Dance and Street Dance. RSL Award's PAA exams have been developed by industry specialists for learners of all levels to measure, assess and reward whilst encouraging innovation and creativity. Aspiring teachers or performing artists can prove and get the recognition of their ambition to succeed through the qualifications in performing arts.

Creative Qualifications

Creative Qualifications are changing the landscape of examinations. As one of the world's leading awarding bodies, RSL Awards continuously strive to ensure the qualifications evolve to reflect new technologies. With 100% online assessment through portfolio submission, Creative Qualifications recognise achievements for a new generation of creative professionals to reflect the jobs of the 21st Century.

Creative Qualifications: Vlogging	From Debut to level 8 qualifications in vlogging, provide the knowledge needed to expand vlogging technical proficiency and editing expertise, all whilst obtaining a solid grasp of story development.
Creative Qualifications: Podcasting	Professional standards in Podcasting train the students or professionals to tell their stories, inspire debate or share revolutionary ideas, whilst progressively learning how to capture, edit and creatively treat audio content.

3.3. Core skills needed in the cultural and creative industries in the PA countries

Between August and November 2022, a primary survey amongst CCIs leaders from PA countries was organised. The interview results revealed the following lack of skills in the Cultural and Creative Industries in the PA countries. The CCI sector leaders mentioned that the skills listed below were identified as being in short supply despite there being a high market demand for professional competencies in CCI sectors.

Core skills needed	Country	Qualification demand description
Technical (hard) skills	Moldova	Moldovan universities do not provide needed courses for hard skills development (eg an animator needs to learn drawing techniques). There are short term courses offered by private entities, but those are optional and are used mostly for improving one's qualification.
	Romania	Romanian universities lag offering courses that respond to current industry needs: animation, 3D graphic design, metaverse development skills. For example, when looking for a marketing manager, candidates seem to lack basic marketing, technological and digital skills, especially in relation to social media, apps, and platforms development.
	Greece	Digital and New Technologies: • Understanding which new technologies are suitable their purpose, • Digital art and design, • Social media - use of social networks, • Live cinema, • Sound and lighting equipment and controls.
Selling skills Presentation skills Creative communication skills	Moldova	CCI entrepreneurs rather see their products as scalable. They, usually, are subcontracted and are paid hourly. They do not know how to develop a portfolio, promote their projects, and sell their skills. For example, in the gaming industry, usually, they are subcontracted for a specific task and do not have ownership of the creative product.
	Romania	Presentation skills: eg how to present an idea to investors or how to fill in an application for projects funded by the European Union.

	Bulgaria	CCIs lack skills for reaching audiences. They do not always consider differences of audiences, determined by age, place, knowledge and access to information. CCIs do not always search for professional advice on how to create and develop audiences and how to communicate with their public – in speaking or in writing. They often use clichés in their messages, which rather make audiences ignore them, or does not help them to differentiate from competitors.
	Georgia	Georgia misses the promotion and popularisation of the traditional fields. The marketing activities in some CCI sectors are non-systematic.
Leadership and entrepreneurial skills **Cultural Entrepreneurship**	Romania	Professionals need entrepreneurial skills (designing a business plan, developing a marketing strategy, negotiating with banks and other financial institutions) to make a living out of their creativity.
	Greece	In the area of cultural entrepreneurship, we have a high market demand for professional competencies such as creativity, vision, idea generation, strategy, innovation, planning, crisis management, negotiation. In the area of Arts Management, a shortage of the following skills was identified: marketing and audience development, arts financial management, fundraising and grant application writing, project management, presentation and communication.

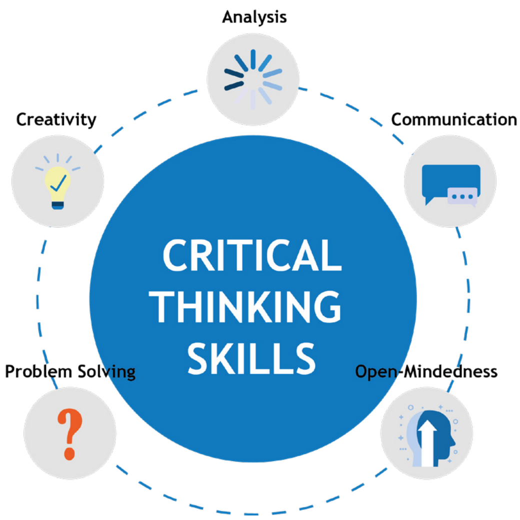
Moldova, Romania, Bulgaria, Greece, Turkey, and Georgia should be seen as a single space and market for Cultural and Creative Industries. Even if every country has its specifics, a bigger vision should be designed for a better cooperation of industry stakeholders.

Interviewed CCI leaders revealed the following needed support for shifting from a supply-led to a demand-led qualifications system:

Moldova	ghgghggEntrepreneurs from CCI being mostly micro- entrepreneurs and freelancers, need to know and easily find each other for collaboration in their projects. They need to consolidate efforts to acquire more and greater projects. In Moldova there are very few companies covering distribution functions.

Romania	An independent, unified digital platform where all creative suppliers are available with transparent and clear presentations of skills, portfolios and offers and where collaborations can occur based on skills is needed. We need a partnership for implementation of skills development. CCI actors should cooperate at the local level to understand the supply and demand and cover the existing gap. This may include engagement of governmental bodies to develop training programmes and learning materials offering on-the-job training and work experience for students, providing access to specialised equipment, opportunities for instructor training and upskilling, collaborating on the provision of vocational guidance, information, and quality, assuring the teaching and assessment of learners in training institutes.
Bulgaria	Each CCI must acknowledge its deficiencies and create partnerships to make their products more appealing and competitive. CCIs have to establish cooperation with the organisations they can learn from.
Greece	• Partnership arrangements • Effective employer engagement • High quality labour market intelligence • Shared objectives • Alignment between delivery agencies • Performance management and evaluation
Turkey	Cooperation of actors in the Cultural and Creative Industries should be encouraged primarily to close the gap between supply and demand. In this context, it will be useful to create role models. The areas where the cultural codes of the society can be defined and evolved should be revealed. Equal opportunity in education — mechanisms that will reveal the original thoughts and potentials of different individuals should be kept open. Society's capacity in this area needs to be promoted.
Georgia	A long-term action plan should be drawn up according to identified demand. The government and the private sector should co-work on the transition to this system.

In conclusion, every interviewed representative of the CCI industry, considered a leader in their respective sector, has mentioned the need of cooperation, collaboration, and partnership within CCI value chains.



The Project External Expert, Aldo di Russo, has mentioned during the interview the following ideas regarding changing the general approach of CCIs:

- 'Heritage is for everybody as the Culture heritage is for common use. It is about what everybody knows in the subconscious and misses. That is what you need to show through culture and creative industries.'

- ‘CCI should start from the beginning and recover what we have lost. History has knowledge which is rather used nowadays. The past always embeds something new which can be the seed of creativity.’
- ‘The CCI have the potential to shake us emotionally. Emotion is in charge of touching anyone's knowledge and reaching a new balance. CCI needs to focus on stimulating emotions through their creative products.’

Going over the history and assessing the PA countries, we discover a common history foundation — Sarmatian Sea. The archaeological culture of the Sarmatian Motherland features various kinds of archaeological monuments (settlements, votive depositions, kurgans, flat necropolises), which are characteristic of different cultural-economic types. This demonstrates the complexity and diversity of the culture in the region, which could be influenced by many factors: the presence of Greek settlers on the northern shore of the Black Sea, the expansion of the Roman Empire, the pressure of nomadic tribes from the East, the advance of the Celtic-Thracian peoples from the West, changing environmental conditions, etc.

Answering the question **‘What would you recommend enrolling CCI sectors to enhance the Cultural Heritage locations?’** Aldo di Russo said that the heritage can be enhanced by using the common past knowledge and historical consequences which became common for them.

> *‘Technology changed our lives. But the mission of CCI should be* **to replug humans into the culture. Creative industries have lost much of their heritage but gained much of smart tools.** *That is why, to create value, we need to learn how to “seduce” our audience. Seducing is the means of changing your audience direction!’,*
>
> ***shared Aldo di Russo during the interview.***

Nowadays, this approach is very pertinent in CCI practice. The cultural tourism value chain needs to be developed to enrich the experience of the final customer. The heritage defines the culture, the culture is addressing large society and forms social cohesion, the social cohesion helps to find national identity, and national identity attracts tourists and helps to develop the tourism economy. The tourism economy shall involve more cultural and creative industries to enrich the tourist offers with cultural experiences.

According to the new approach, PA countries should upgrade the roles involving heritage culture to stimulate the sector and create their CCI market system which can be connected to a common network.

Heritage value creators	Heritage value promoters (transmission)
• GLAM Sector (galleries, libraries, archives, and museums), • Visual Arts and fine crafts, • Culture and heritage, • Specialty foods, • Literary arts.	• ITC Sector, • Advertising and Publishing, • Audio-visual, • Performing Arts, • Design.

Skills profiles of the creative and cultural industries need to get connected to the heritage assets. This will empower the creative and cultural industries to achieve their economic potential, through relevant skills and training.

When creating cultural and creative goods for common use we need to take inspiration from history. Culture generates the idea, the story and can increase the motivation of use.

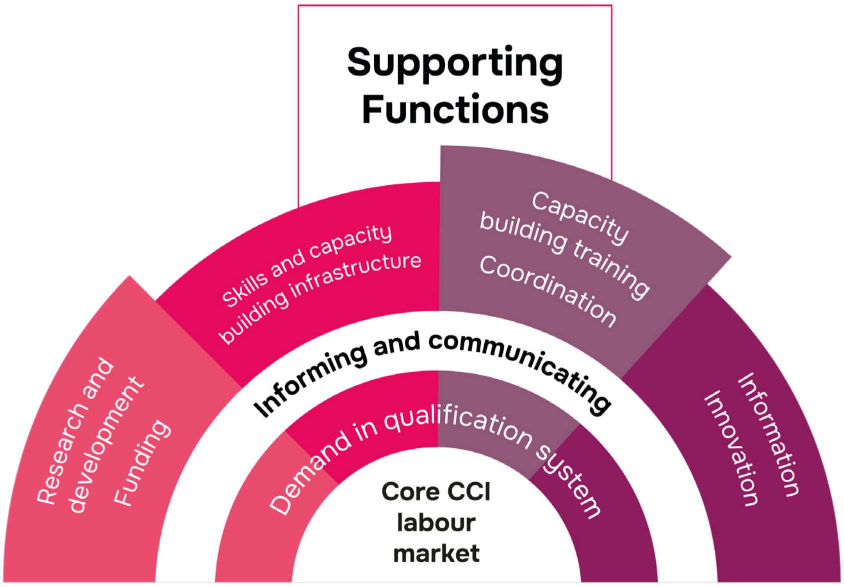
Heritage value creators	Heritage value promoters
• Graphic designers • Architects • Designers	• Actors, performers • Musicians • Video producers • Authors, writers, storytellers • Communicators (copywriters, social media managers) • Event organisers

Businesses should involve artists to create a piece of art from their goods and services. The synergy between the sectors can create customer experience at any stage of service offering the occasion to live the heritage exploring by multisensorial means of expression.

CHAPTER IV

Supporting functions for market system development

The Culture and Creative market system development approach represents a systemic and cross-sectoral perspective to ways of cooperation and competitive inclusion within PA countries at cultural and creative sectors level. **Therefore, supporting functions are very important to sustain the formation of the CCI ecosystem: research and development, information and communication, training and skills development infrastructure, and financing programmes. All those aiming to facilitate the development of the common market system.**



4.1. Research and development

The level of innovation in PA countries is defined by the ability of the country to collect, disseminate, and process information, and the involvement of local enterprises in research and development activities. CCIs need to shift their focus towards research and development. In most PA countries, research and development is ad-hoc rather than planned, aimed mainly on strategic objectives, as the majority of research is done for foreign-owned companies or international organisations aiming to implement developing projects in the respective country. EU policies and national findings are available to support the sectors of CCIs with special emphasis on this reliance on funding.

Many private-sector firms recognise the need for R&D and thus hire CCI specialists for their own needs. Enterprises with higher financial resources create their CCIs as new jobs to improve their business. This type of research and development is particular to the marketing and design field.

4.2. Information and communication

Good information flow is needed for efficient market system development. Even if sufficient knowledge is present, partial involvement of innovation stakeholders in the information flow is notable in PA countries. Lack of institutional monitoring and potential support for the CCI sector is also notable. While CCI actors are well connected, they still tend to develop cross-border partnerships.

CCIs sector is overall recognised as a driver of innovation with plenty of professionals with the right skills and competences to work within modern commercial fields. Still, there is a threat of raising inequalities due to already existing digital discrepancies (eg access to on-line training programmes). Creative people have a lack of communication and sales skills, which is a barrier to their business development. **The cultural heritage sector is the one that particularly misses out on the value proposition of their product. A systemic communication strategy may impact positively their development path.**

There is insufficient flow of information and dissemination, mainly through social media channels covering limited audiences. Because of low awareness and limited experience, not all key actors are involved in the essential communication networks. There is a need to include liaisons with higher education institutions into the strategic development plan **The increasing interest of CCI sectors in cooperating with the academic sector is seen optimistically.** An example is the Politehnica University of Timisoara (Romania), which designed a short training course for people with interests in creative industries in partnership with the Intercultural Institute of Timisoara. The core of the programme is business, management and communication know-how, entrepreneurship, and digital competences for those who want to make a living within the wide definition of creative industries. It focuses on the need for the promotion of a procreativity culture, which stimulates the flourishing of creativity among teachers and students.

4.3. Training and skills development infrastructure

Education has become irrevocably entwined with technology. Perhaps the new generation of the human labour force needs to see a more transformative approach to education. Online maps, interactive videos, gamification" (computer games designed for more than entertainment) have all become an integral part of any learning journey. The educational systems are facing the most unpredictable and disruptive revolution ever and many changes will stay in place after the pandemic. This is an unprecedented opportunity to encourage the integration of cross-sectoral **training, skills enrichment and cultural change supporting Digital and Tech in educational and training curricula, as well as the creation of life-long educational models.**
Some countries (Turkey, Greece, Bulgaria, Romania) have a larger experience in implementing programmes aimed at training and skills development in CCI sectors, whereas some of PA countries only started to create and develop these opportunities (Moldova, Georgia).

For example, in Turkey, the nation-wide project Thread of Culture by Empowering Turkey's Local Cultural Professionals had the objective to improve the competencies, skills and increase the overall capacity of cultural professionals at a local level in Turkey.[33] The content, curriculum and the programme of the training was designed, prepared, and implemented by prominent professionals from the academia, civil society, and private as well as the public sector.

In Bulgaria, there are many academic institutions that specialise in creative and cultural activities: Master's degrees in New Bulgarian University, University of World and National Economy, The University of Veliko Tarnovo, Varna University of management, etc.[34]

[33] https://www.iksv.org/en/news/iksv-to-receive-unesco-s-international-fund-for-cultural-diversity

[34] Danubian baseline study

'Despite CCI education being abundant, the importance given to intrapreneurship in courses is low. Like other countries, there is no structured mentoring system that works alongside the provision of VET training on CCI subjects.

***says Elis Iaia, Associate Planning Director, Publicis Romania*.**

In Romania, the National Institute for Cultural Research and Training, which is organised under the auspices of the Ministry of Culture, carries out research within the vocational education and training (VET) field on topics related to the cultural and creative industries. Most of CCI-related courses are offered at the undergraduate level.

'The CCI labour market relevance of vocational education and training outcomes is still limited. Some steps have been taken to recognise learning outside formal education and training and to steer the new dual vocational education and training, yet pressing challenges remain. Unfortunately, Romania has the lowest participation rate in lifelong learning in the EU, because of attitudinal and systemic problems.'

***said Valentin Stefan, Director at Digital Adviser Project*.**

In Moldova, some experiential platforms aiming to co-create within creative industries, involving both the private sector and academia were set up. An example is the partnership between the State University of Moldova and Mediacor — the centre of media productions and technologies for the filmmaking industries[35].

'We want to bring all the players in the media under the same roof to experiment with the technologies, produce new formats of media content, and learn new skills. We organised several meetings with our colleagues who work for the television and they told us that they are looking for new people,'

***mentioned Doina Nistor, the director of the programme Technologies of the Future*.**

Over the recent years, international programmes offered numerous training opportunities for cultural and creative industries within the PA countries. These programmes were implemented with the main objective of developing the CCI labour force while focusing on Sustainable Development Goals. Despite the significant impact of the developing programmess implemented on the markets, they lack systemic continuity.

In 2022, a large-scale skills partnership for the Cultural and Creative Industries ecosystem, **Pact for Skills[36], was set up.** This partnership aims to establish a shared model for skills development in Europe to pool resources and engage in concrete upskilling and reskilling initiatives in the cultural and creative industries. The partnership

[35] https://www.mediacor.md/

[36] https://single-market-economy.ec.europa.eu/news/new-pact-skills-partnership-set-promote-skills-cultural-and-creative-industries-2022-04-28_en

will promote learning opportunities and on-the-job training to strengthen the resilience of the sector and equip its professionals with the skills they need. There will be a **particular focus on digital, green, entrepreneurial, and technical skills, as well as on arts and crafts.**

Currently, the social partners operate with the dedicated European platform for employment and training in the audiovisual and live performance sectors – **Creative Skills Europe**[37], that involves many private and public stakeholders. The Platform engages in activities such as sharing good practice on skills. But still, there is space for gathering more market intelligence for measurement and diagnosis of the skills gaps. Market data gathering is extremely important in this ecosystem as it is characterised by a very high level of fragmentation, which makes it hard for individual stakeholders to see themselves as part of a bigger picture.

This initiative represents a good example to respond to demand-led qualifications that the market needs and to support the cultural and creative industries development on extended markets.

In this direction, the PA countries' network shall facilitate better and deeper coordination between diverse programmes and levels of funding to drive investments in reskilling and upskilling plans able to provide equal opportunities to workers and strengthen the support to youth employment and entrepreneurship development.

Real education is something more difficult, more challenging, and more truly human. The technology can assist in this cause, but a real time infrastructure is needed for driving the qualification improvement process. Therefore, a potential list of hubs and co-working spaces [38] sorted by country is available for CCI actors.

4.4. Financing programmes and awards

Smaller companies from the CCIs sector rarely get supported outside of public financing, but in some PA countries there are incubators that support CCIs.

The European Heritage Awards/Europa Nostra Awards were launched by the European Commission in 2002 and have been run in partnership with Europa Nostra ever since. The Awards are supported by the Creative Europe programme of the European Union. A total of 130 Grand Prix of €10,000 have been presented to outstanding heritage initiatives, selected from among the award-winning projects[39]. Several PA countries were awarded by European Heritage Awards. **This should motivate newcomers to be more active and explore the existing funding opportunities.**

[37] https://www.creativeskillseurope.eu/

[38] Network - European Creative Hubs Network

[39] Winner Archive - European Heritage Awards / Europa Nostra Awards

CHAPTER V

Cooperation and cross-border opportunities

5.1. Cross-border cooperation premises

Cross-border cooperation is the key element to develop a lucrative ecosystem within the Project Area countries.

The baseline study[40], developed for the mapping of cultural and creative industries in Danubian urban communities (including Bulgaria, Greece, Romania, and Moldova), identified the lack of transnational cooperation and coordination on the institutional level hindering research and innovation potential of the Danube region. Furthermore, the sector is challenged by the insufficient capability of SMEs to adapt to innovation needs.

The analysis led to several conclusions:

• Smaller companies from the CCIs sector rarely get supported outside of public financing but there are some incubators that support CCIs;

• Improvisation describes the Romanian culture well, and this works favourably on CCIs entrepreneurial activities;

• In Bulgaria, the emphasis is on what people find innovative and creative;

• In Moldova, the openness to foreign countries in the field of culture is notable;

• When it comes to CCIs ecosystem, the most favourable conditions are found in Bulgaria, and the least favourable conditions are detected in Moldova;

• When discussing values, the attitudes towards creativity and entrepreneurship along with attitudes towards learning and competition were discussed. The scores show, the most favourable attitudes are detected in Bulgaria, but also in Moldova. The lowest scores are detected in Romania;

• When it comes to competition, a positive and healthy competition is noted in all countries. Good start-up environment is mentioned in Moldova and Romania as well. Entrepreneurial spirit among the youth is notable.

The Blueprint invites us to identify where to facilitate a systemic change for a better cross-border cooperation, meaning:

— changes in the underlying dynamics of the qualifications system in CCI:

> *All project area countries mentioned that the Government recognises that CCI has economic potential and invests in its development. Therefore, supporting functions shall be settled.*

— changes that influence the incentives, relationships, and the capacity of market actors to make the system as a whole work better for all:

> *Cross-border opportunities should be wielded in a systematic manner engaging continuous perspectives for all.*

[40] Danubian baseline study, RESTART_4Danube, Boosting Creative Industries in Urban Regeneration for a stronger Danube region

— a change that affects the scalability and sustainability of the system and makes it more inclusive:

> *The cooperation shall establish ways of collaboration between market actors and enrich the ecosystem in a sustainable way.*

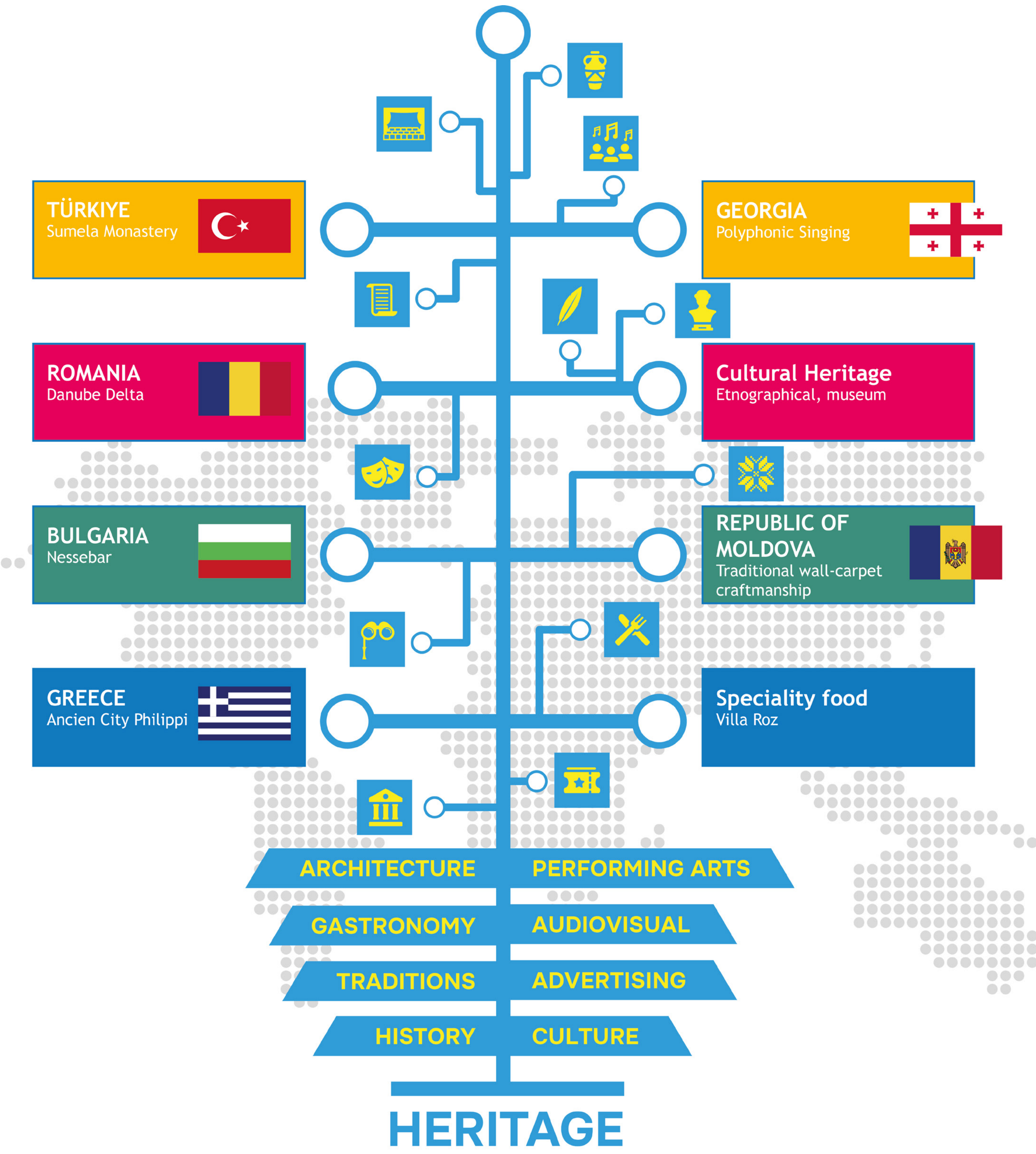
The goal is to support CCI actors in adopting new collective behaviours that would lead to better participation and cooperation within the PA countries market systems.

5.2. The cooperation model "The Tree of Culture"

The inspiring model The Tree of Culture will drive the PA countries to acquire a common experience, enrich the roots of culture, and promote the unique heritage locations. All CCI actors should embody new behaviour according to the model and their role in the system.

Heritage represents the roots of the Tree of Culture and is formed from the history of the location. Based on the roots of heritage, the audience may get connected through a common stem – culture. The stem embodying cultural sectors grow sharing heritage through cultural sectors' activities expressed in cultural outcomes. The vim of national identity, expressed through the creative sectors of CCI — the Audio-visual, Advertising, and Performing Arts — should engage and promote heritage locations. Local businesses shall get inspired by heritage location culture to transform customer experience into a unique adventure. Heritage locations shall identify ways of improving their services by employing multisensorial expression to engage more audiences in different ways and occasions.

THE TREE OF CULTURE



The model shows the market actors' roles described in the following table.

THE TREE OF CULTURE COMPONENT	MARKET REPRESENTATIVES	MARKET ROLE
Heritage	• UNESCO heritage, national heritage, local heritage • Heritage locations	National heritage represents the common history and culture of a nation. Being inherited from ancestors, it should be preserved by descendants through means of culture. Heritage should inspire market actors and help to create connections. Heritage locations represent the strategic area of CCI development and a starting point for the Black Sea Basin Cluster.
Cultural sectors	• GLAM Sector (galleries, libraries, archives, and museums) • Visual arts and fine crafts • Culture and heritage • Specialty foods • Literary arts	Cultural sectors aim to preserve history, traditions, and culture. Their role as heritage value creators is very important for cultural goods and content creation. They are pillars for engaging the audience.
Creative sectors	• ITC Sector • Advertising and Publishing • Audio-visual • Performing Arts • Design	Creative sectors have the role of heritage value promoters and the important mission to transmit the heritage value of the country or region. They may be considered trend creators and their role is two-folded : to create and to increase demand.
Heritage location suppliers	• Local businesses	Local businesses should envisage the chosen heritage location and align their businesses accordingly, to create added value outputs (product, services) meeting better their customers' expectations.

5.3. Competitive advantage

The envisaged changes in economic behaviour within the market system could significantly improve collaboration along the cultural tourism value chain.

Common history roots lead to cultural similarities and familiar interests, but the variable that always makes the difference is the human capital.

Primary research during the project identified national competitive advantages in terms of qualifications and skills referring CCI labour market, described from CCI leaders' point of view:

Moldova	Compared to other countries, Moldova is a small country, but a very creative one. Our competitive advantages are the following: • Higher understanding of cultural diversity; • Linguistic advantage: a good command of Romanian, Russian, and English; • Moldova is a representative type of slow consumption and preservation of traditions.
Romania	Many Romanian artists blend traditions and Western influences in their creations. Romanian cultural heritage and history is an unlimited source of inspiration and cultural expression. The Romanian CCI sector has become dynamic and successful, thus painting the country in a particularly favourable light in terms of growth and innovation. The cumulative effect of macroeconomic dimension and cultural specialisation recently led to the widespread recognition of the economic role of CCI by public policy makers. CCI is also targeted as one of the priority sectors identified in Romania's National Recovery and Resilience Plan (NRRP). Some of the industries from the CCI sector enjoy exemption from tax on income from wages which led to the safe placement of these industries on the global map of international competition.
Bulgaria	Cultural diversity is seen as the basis for the CCIs product and services diversity.

	Predominance of medium-sized or micro businesses Advantageous geographical location and mild climate Free thinking and critical spirit High labour intensity
Greece	High aesthetics and quality of expression Adaptability to an ever-changing environment The uniqueness of the Greek language A distinctive personal character Productive or creative imagination, seen as the ability to process new useful images and concepts
Turkey	Turkey has a great and rich heritage in terms of Cultural and Creative Industries. The new generation is open to change and is highly competitive.
Georgia	Georgia's competitive advantage lies within the individuality and beauty of its regions. Despite the small country size, this each region has a unique landscape, its characteristic climate, traditions, culture, cuisine, and handicrafts. All this creates a competitive and diverse environment.

The identified research results could help to create the national PA countries CCI qualification profile and create opportunities for efficient cooperation. Having the knowledge of competitive advantages, PA countries will better use their potential and capitalise better on their uniqueness.

This will significantly improve cross-border cooperation and enhance capacity building within cultural and creative industries across the PA countries.

CHAPTER VI

Recommendations for future actions

The HERiPRENEURSHIP Project works to create fair and inclusive opportunities for young people within the creative and cultural sectors from Project Area countries.

The Blueprint aims to facilitate raising awareness about the growth potential of the CCI sector, innovate on cooperation models and build synergy between the involved actors, to help shape the skills, education, and employment based on best practices. The Blueprint encourages PA countries to act and enable opportunities to drive changes and help to build an inclusive skilled CCI sector.

The Tree of Culture model envisages that CCIs have the potential to contribute to a sustainable country growth and recommends responding and assuring the supporting functions for market system development. The Blueprint will guide the local stakeholders to map current realities, envision the change and grasp the economic value of culture to form a strong Private-Public Partnership at the country and regional levels.

— Governments should consider the model and enforce common regulations: a legal framework, industry standards and codes of conducts, policies and strategies, quality standards, a customer protection act, etc.;

— Research and development should have a strategic role in the CCI sector development;

— Cultural heritage policies should be accessible to all whether in schools, universities, museums, heritage and cultural sites or venues (theatres, cinemas, live events) and media channels (linear and nonlinear);

— Strategic bodies should be encouraged to continue to invest in the development of sector-specific skills and knowledge;

— Training and skills development infrastructure and communication functions should consider mapping the stakeholders to facilitate the cooperation within the actors on the market;

— Innovation should support the market system development and enable it to adapt continuously to the demand.

— Governments should consider the model and enforce common regulations: legal framework, industry standards and codes of conducts, policies and strategies, quality standard, customer protection act, etc.;

— Cultural heritage policies should be accessible to all whether in schools, universities, museums, heritage and cultural sites, or venues (theatres, cinemas, live events) and media channels (linear and nonlinear);

— Research and development should be placed at the centre of CCIs strategic development;

— Strategic bodies should be encouraged to continue investing in the development of sector-specific skills and knowledge;

— Public authorities should attach more importance to the identified CCI skills gap at various levels within the system and facilitate the process of bridging this gap;

— Training and skills development infrastructure and communication functions shall consider stakeholder map to facilitate the cooperation within the actors on the market;

— Innovation shall support the market system development and enable it to adapt continuously to the demand.

The tangible or intangible heritage makes up the identity of a country and might be of interest to its visitors. In the post-pandemic time, the cultural heritage has the opportunity and a significant role to play in building a sustainable future:

— By engaging with contemporary events and co-producing new knowledge and heritage narratives with more diverse communities and perspectives;

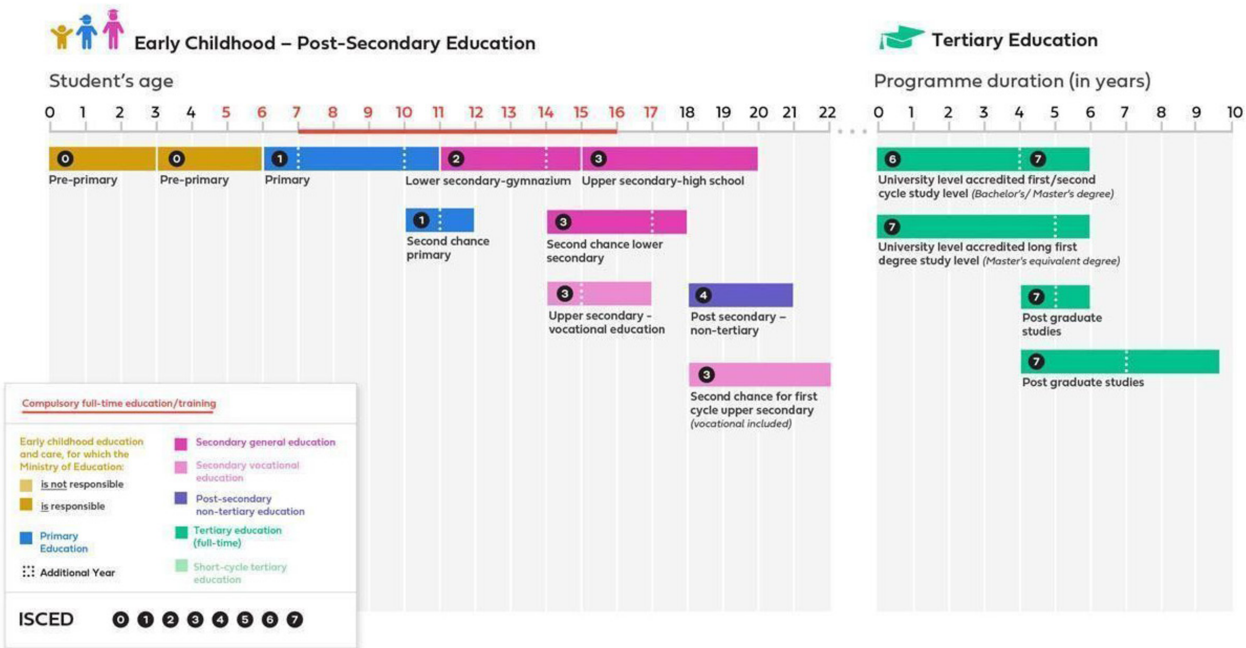
— By strengthening the development of cultural heritage management strategies based on disaster prevention and response;

— By enhancing the creative field's ability to deliver new cultural offers and services that emerged during Covid-19 are now becoming a norm;

— By exposing the public heritage spaces to new uses accessible to all and making them available for outdoor events (from concerts to street performances);

The way cultural heritage creates a sense of place and local identity makes it a central instrument to a resilient economy.

Romania



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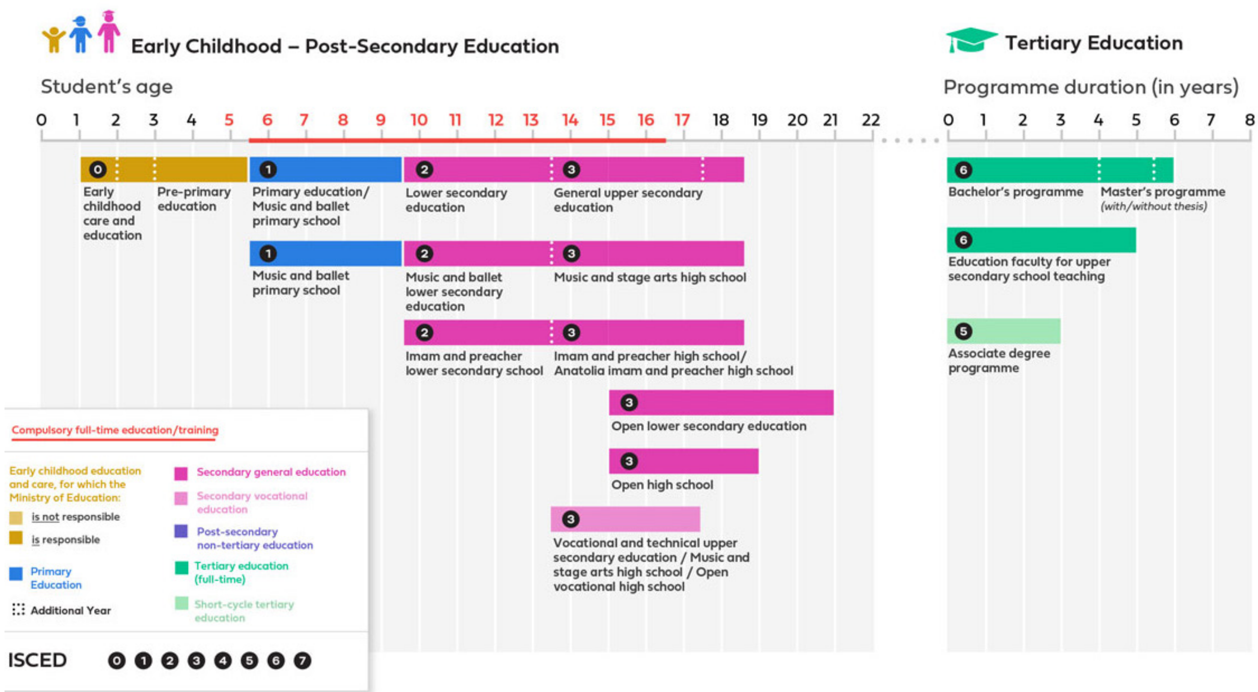
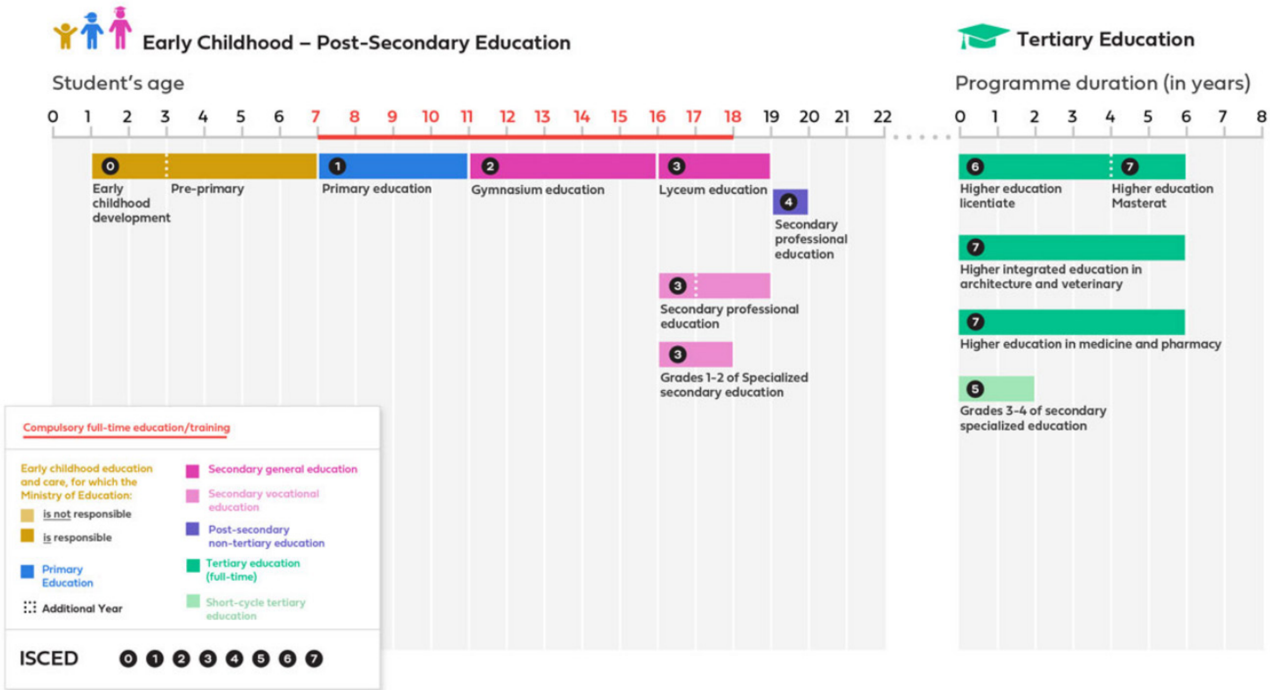


Republic of Maldova



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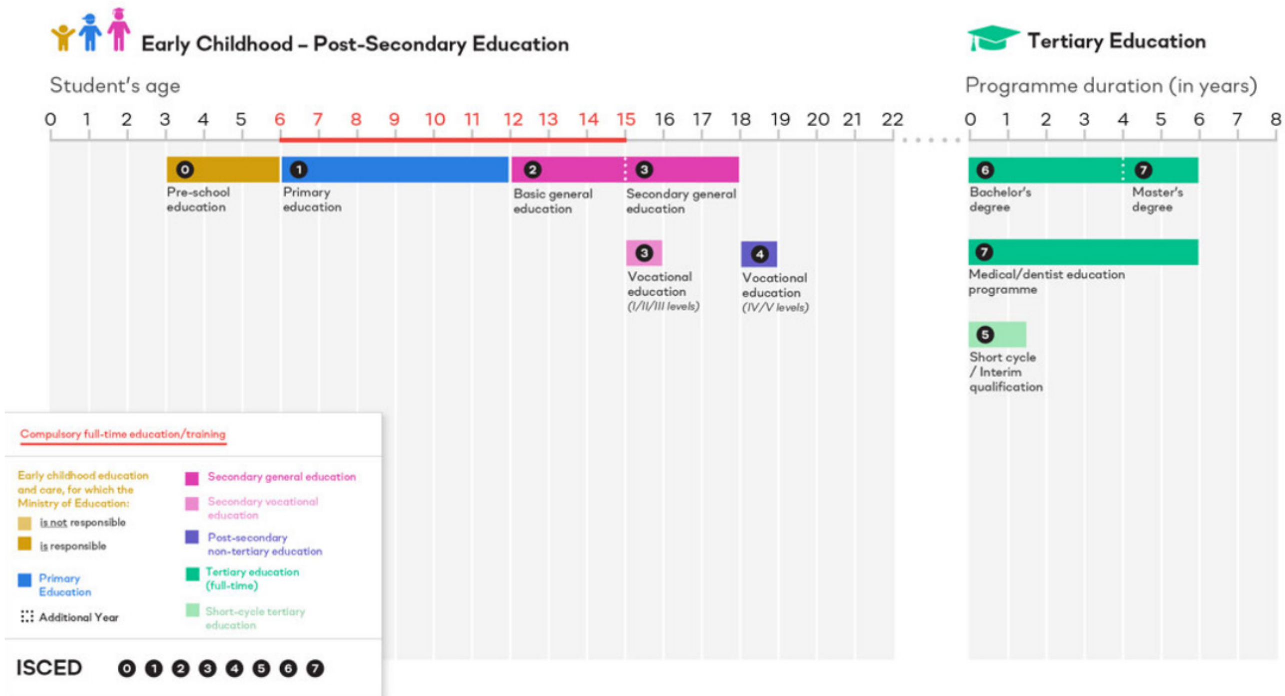
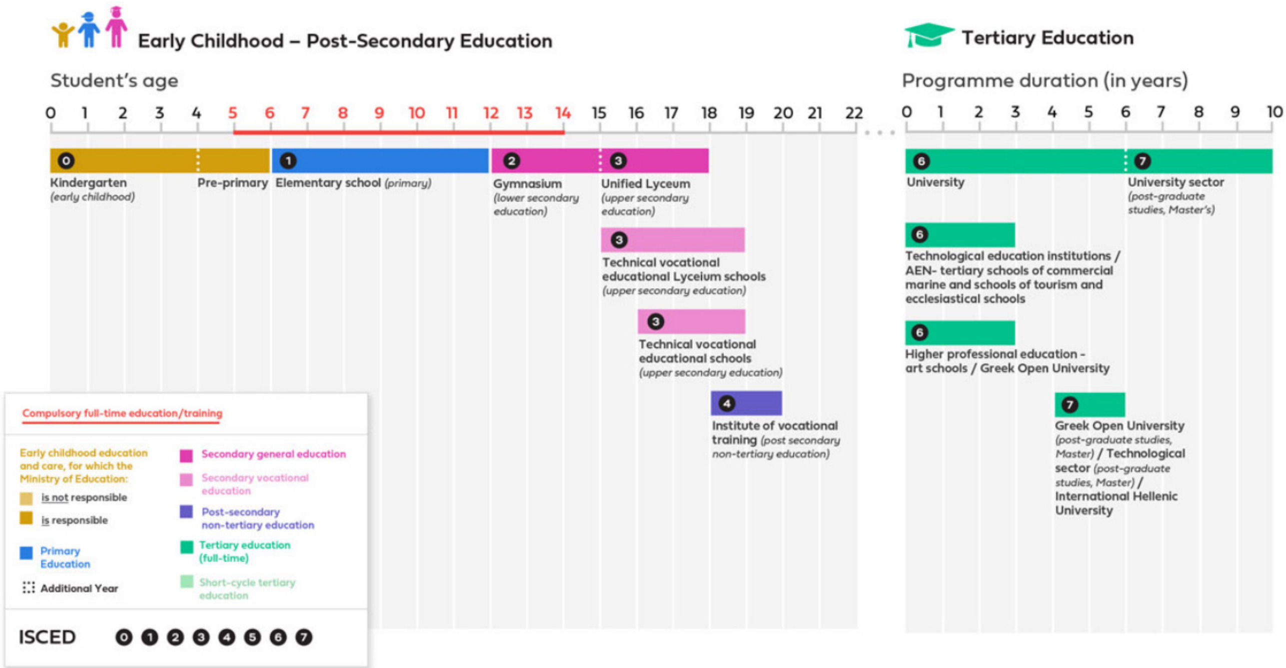


Greece



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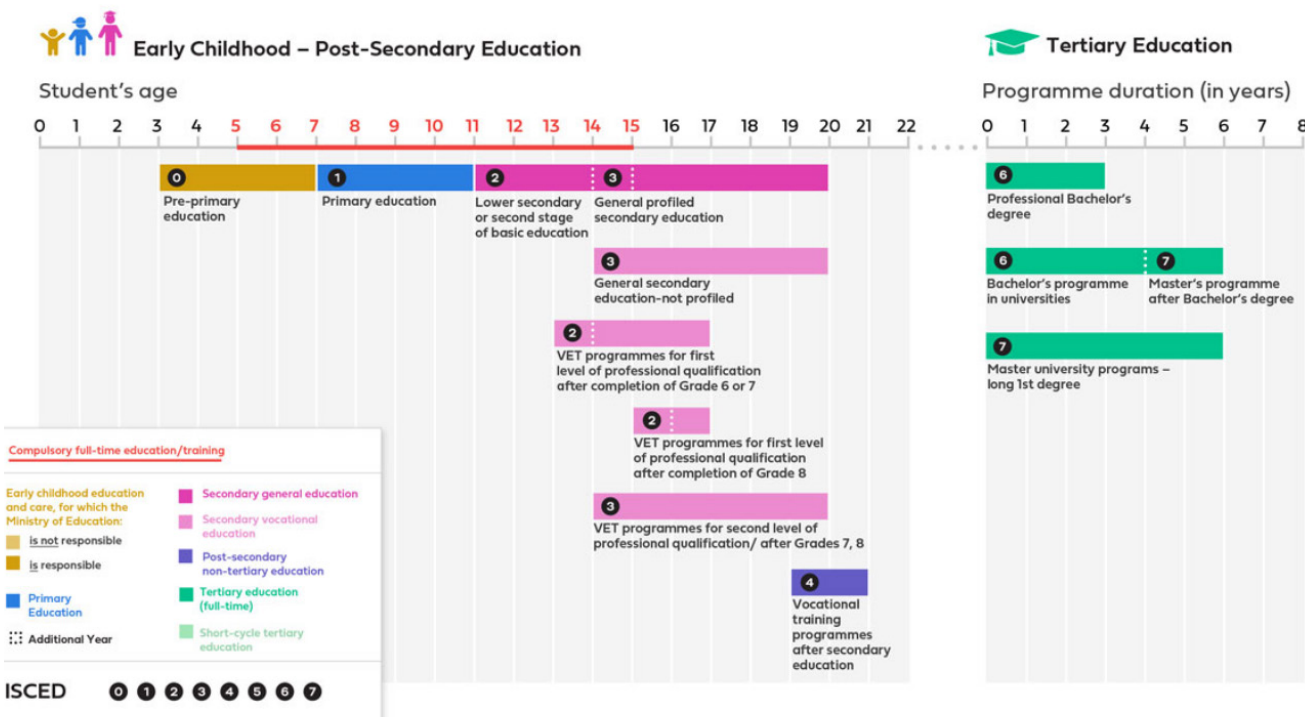

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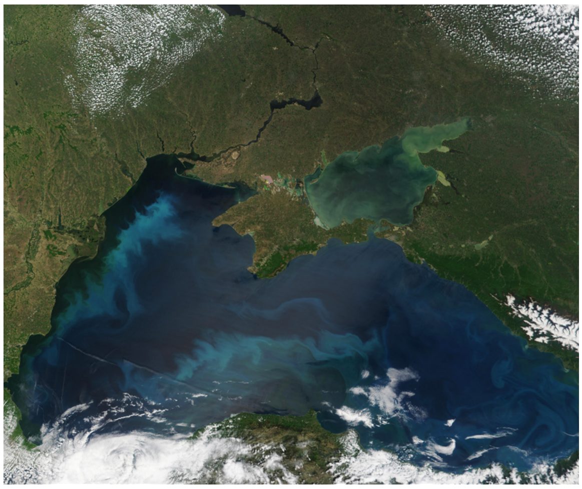

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