Ecosystem session: CREATIVE & CULTURAL INDUSTRIES

Clusters strengthening ecosystems
Cultural & Creative Sectors Ecosystem

From crisis to recovery and transformation

Martin Dawson – Deputy Head of Unit of Audiovisual Industry and Media Support Programmes, DG for Communications Networks, Content and Technology (DG CNECT)
Industrial ecosystems for the recovery

- CCS include audiovisual, music, books, press, performing arts, visual arts
- Difficult to measure but in EU 27 represent at least:
  - 2.7% of EU value added
  - €405 bn in turnover
  - 5 mio employees
  - 1 104 000 companies
- Digital dimension ?
Ecosystems: from analysis of investment needs to operationalisation

- **Main mission**: identify recoveries strategies for each ecosystem and build a pipeline of projects, which can involve legislation, industry alliances and/or investment.

- The more concrete the projects are, the better and the stronger the likelihood of being supported through **Next Generation EU**

- Projects should be ready to be implemented immediately or in the short term.
The ecosystems approach

- Financial capital
- Audiences
- Professionals
- Creativity
- Large corporations
- Start-ups
- SMEs
- University
- Non-profit
- Public funds
- Cultural & creative sectors
- Physical venues
- Digital platforms
- Data
- Heritage

- European Commission
Challenges for Europe’s CCSs ecosystem

COVID-related

Closure of cultural venues

Falling ad revenues

Limitations to development of artistic creations

- Market fragmentation across national and linguistic lines
- Small & medium companies
- Lack of connection between content and tech
- Ads market & dissemination dominated by OTT
- Rise of global competitors (Asia)
- Challenges to artistic & media freedom
- New consumer behaviours

Critical situation for competitiveness and cultural diversity

European Commission
Objectives

Immediate recovery
- Help CCSs to weather the storm until the economy picks up
- Compensate for revenue losses and provide liquidity
- Preserve cultural diversity and autonomy

Long-term transformation
- Transformative investments to help CCSs face the twin transitions of climate change and digitisation, in the context of fierce global competition
- Effective regulation to ensure a true level playing field
- Building resilient CCSs
Possible areas of focus

- Data & digitisation
- Scale & cooperation
- Immersiveness
- Global reach & soft power
- Cultural hubs
- Values: freedom, diversity & inclusion

‘AUDIENCE-FIRST’ APPROACH
Artic Design Cluster – Boosting Innovation

Satu Miettinen
From the North

FACTS OF LAPLAND

- The northernmost region of Finland and the European Union
- Border with Russia, Norway and Sweden
- Capital city, Rovaniemi, the Official Hometown of Santa Claus
- Total area 100 366 km², of which 7 699 km² is water
- 180 200 inhabitants (2016), density 1.8 people/km², a bit more reindeer than people.
- World’s cleanest air and Europe’s purest water
- World’s largest organic harvesting area
- Employment: municipal sector 30%, state and state-owned companies 10% and private sector 49% in total 68 610 jobs
- Number of companies 9 094
- Total turnover of companies 12 000 M€
- 4th strongest export region in Finland
- Lapland region has the fastest growing economy in Finland
- 3800 M€ Industry export revenues (7% of the national export)
- World’s northernmost hub of bio-, mining-, metal industry and services
- Mining and metallurgy around 5000 M€
- The only chromite mine in the EU
- The biggest gold mine in the EU
- Forestry, manufacturing of wood and paper & paper products 1300 M€, 98% of total land area is forest
- Annual increment of forest growing stock 13,3 Mm³
- Sustainable harvesting limit 7,2 Mm³
- Total annual loss 6,1 Mm³, including harvesting 4,6 Mm³
- Total tourism demand in Lapland is more than 1000 M€
- 2,7 million registered overnight stays in Lapland
- Annual growth rate ~20%
- Agrofood production 300 M€
- 4 429 Reindeer owners
- Annual revenue ~39 M€, doubled in last 10 years
Building Blocks for Regional Ecosystem
https://arcticsmartness.eu/arctic-smartness-clusters/
Arctic Design Cluster