Ecosystem session: CREATIVE & CULTURAL INDUSTRIES

Clusters strengthening ecosystems

European Commission

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Federal Ministry for Economic Affairs and Energy

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Cultural & Creative Sectors Ecosystem

From crisis to recovery and transformation

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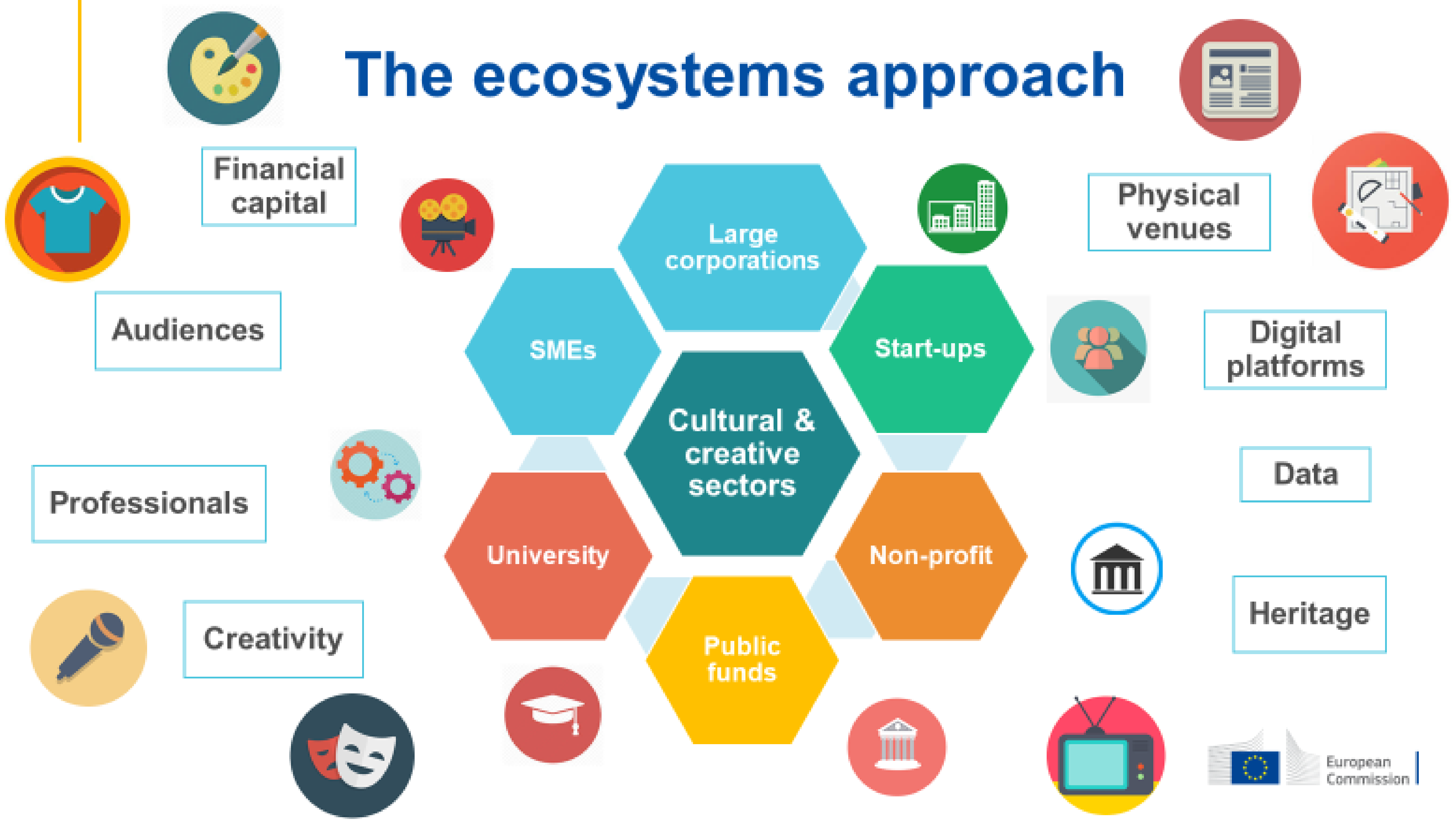
Industrial ecosystems for the recovery

- 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



Challenges for Europe's CCSs ecosystem

Market fragmentation across national and linguistic lines

Ads market & dissemination dominated by OTT

Small & medium companies

Rise of global competitors (Asia)

Lack of connection between content and tech

Challenges to artistic & media freedom

Strong reliance on public funding

New consumer behaviours

COVID-related

Closure of cultural venues

Falling ad revenues

Limitations to development of artistic creations

Critical situation for competitiveness and cultural diversity

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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

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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

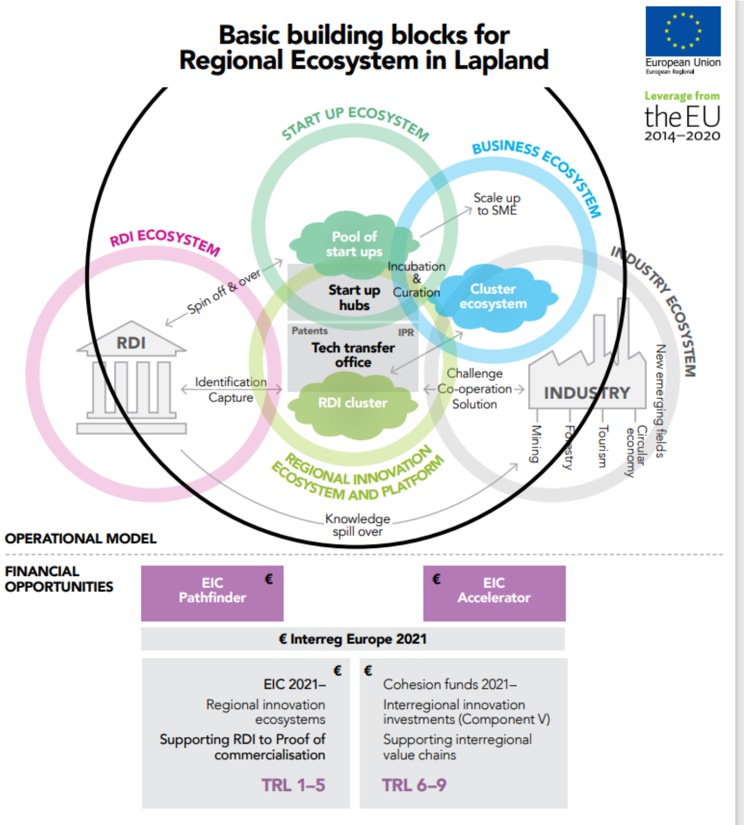
- Mining and metallurgy around 5000 M€
- The only chromite mine in the EU
- The biggest gold mine in the EU

- 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



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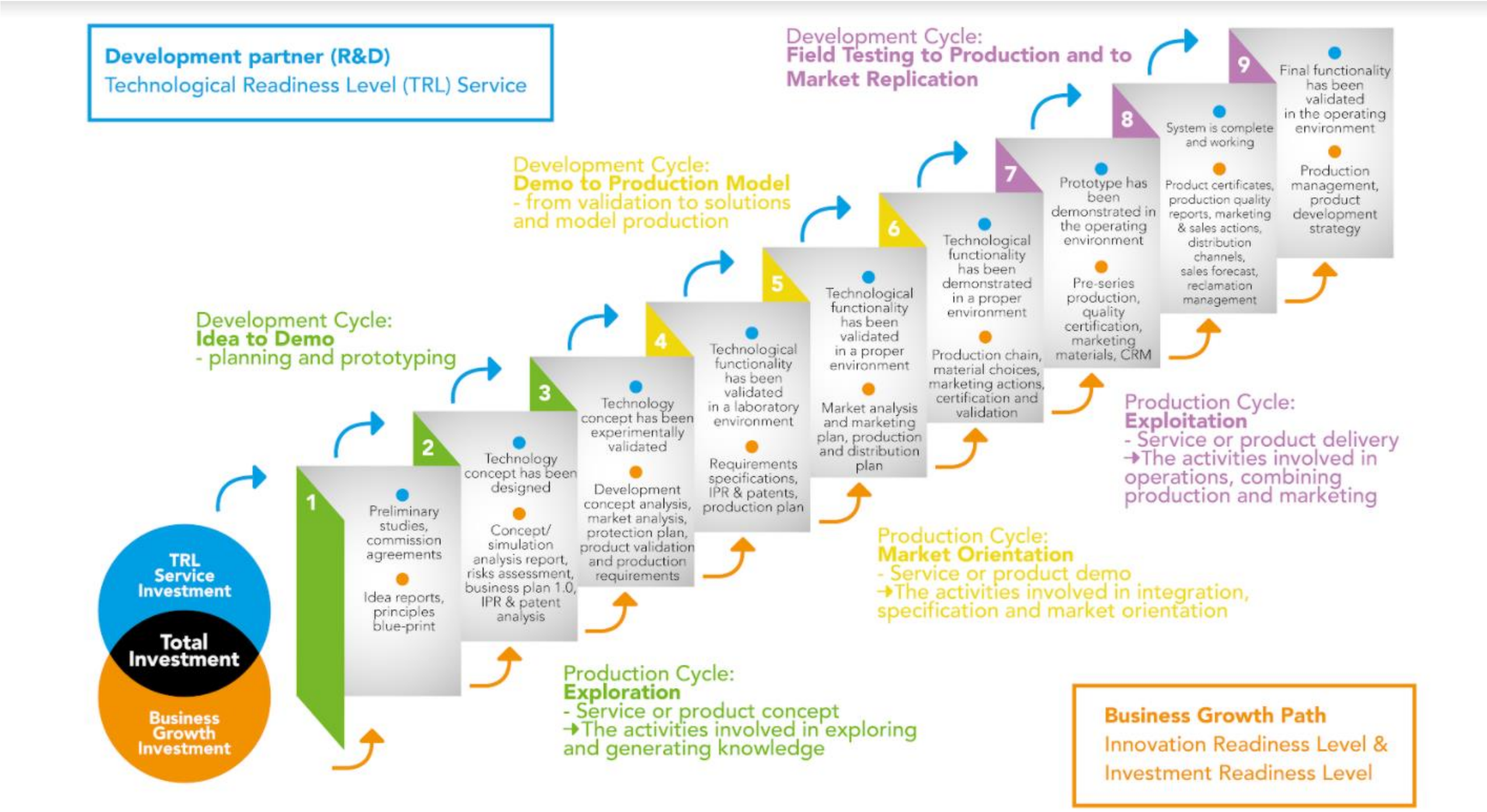
https://arcticsmartness.eu/arctic-smartness-clusters/



Arctic Design Cluster