

**EUROPEAN
EXPERT
NETWORK
ON CULTURE
(EENC)**

***The resilience of employment in the
Culture and Creative Sectors (CCSs)
during the crisis***

by Giulio Stumpo, Robert Manchin

EENC Report, February 2015

This document has been prepared by Giulio Stumpo, and revised by Robert Manchin on behalf of the European Expert Network on Culture (EENC). Research support has been provided by Elena Alessandrini, Cristina Da Milano, Mercedes Giovinazzo, Flaminia Piedimonte and Federica Torsello.

EXECUTIVE SUMMARY

On April 10 2014, the Directorate General for Education and Culture of the European Commission - Unit E1 (DG EAC/UNIT E1) submitted to the European Expert Network on Culture (EENC) a “*Request for a study on the resilience of employment in the Culture and Creative Sectors (CCSs) during the crisis, the percentage of youth employment in the CCCs, and the projections of employment and growth of the CCCs notably in the digital environment*”.

The work proposal developed by the EENC foresaw the carrying out of a study in the 28 European Member States consisting in the collection and analysis of available public data on culture, creativity and the new technologies with the following overall aim:

- ✓ To present statistical and policy evidence supporting the assumption that employment in the Culture and Creative Sectors (CCSs) has proven to provide for a certain degree of resilience during the years of the financial crisis in Europe.

The work proposal also included providing the following:

- ✓ A summary of updated information on the employment in the CCSs (notably youth employment) and its comparative resilience during the crisis in different Member States taken from existing bibliography and available statistics (among others, from Eurostat);
- ✓ A set of comparative examples highlighting the labour-intensive character of the CCSs, notably in relation to youth employment;
- ✓ A preliminary projection of jobs and growth in the CCSs, notably for the young.

To this end a data base collecting data available from public statistical institutions, especially from Eurostat, was compiled for further exploitation to produce short comparisons of the data available in the 28 Member States and answer specific queries on issues related to the objective of the study.

The review and analysis of the best available statistical evidence regarding employment in the various local labour markets in Europe, has enabled to show that the cultural and creative sectors (CCSs) have provided for a certain degree of resilience during the years of the economic crisis in Europe. The rich data presented in the country by country summaries however suggest that the CCSs are not immune from the state of the overall policy responses of the given governments.

Through the desk research all publicly available summary information on employment in the CCSs (especially on youth employment) was collected and, afterwards, analysed. From the available aggregate information (both in terms of primary statistical sources and in terms of previous policy studies on the subject) strong indications of comparative resilience during the crisis in different Member States were found.

Indeed, the labour-intensive character of the CCSs, notably in relation to youth employment, can act as a flexible buffer zone in the special labour market characterizing the sector and what emerges now, in the aftermath of the crisis, is a new policy environment. If this conclusion is correct, any overall policy should consider that the CCSs are divided in terms of characteristics of the jobs they can offer to segments that are governed by different logics.

On the one hand, there has a subsector that is very sensitive to the availability of public sector funding and to the shifts in cultural policy priorities in the different Member States. Trend-lines presented in the profiles of the Member States, demonstrate clearly that long term job security in time of contraction of cultural budgets is much harder to come by for those young professionals who are entering the cultural labour market in this segment. Also, the high turnover in limited *ad hoc* positions is not unique to this sector – the high unemployment among the young cohort is similar to the situation in other professional

service sector jobs, but without special policy considerations for the most creative cohort, it can cause a permanent dent on the performance of this subsector of CCSs.

At the same time, the mostly private innovative sector that characterizes the other dominant segment of the CCSs, as demonstrated by data, is also undergoing a rapid change. People, especially young people working in occupational categories that cover ICT related jobs, are not just resilient to the crisis; in most countries these job opportunities are expanding in a more dynamic fashion than those offered by the rest of the economy. A new cross-section ICT and creative, design and digital media related app-economy is emerging in some of the most dynamic creative clusters in various European regions. A preliminary projection of jobs and growth in the CCSs in this particular segment is positive, notably for the young creative professionals who prefer to work in a dynamic, less formal job market.

As shown throughout the study the work force employed in the CCSs represents a very small part of the total work force: indeed, those employed in the CSIs represent approximately 2% of the total work force. The Labour Force Survey (LFS) is carried out through a sample of the total work force and, although the resulting trends can be considered as general, when specific segments of data (be it per country or sector) are analysed trends appear as less significant. Consequently, when alterations happen on small numbers and are applied to percentages they appear to be more relevant than what they should.

As most studies show, women represent the highest percentage of those employed in the cultural sector, in general, but also in the CCSs. When the “resilience” factor appears in employment the obvious question is whether it is the sector, be it the cultural sector of the CCSs, which is resilient or whether it is rather women that, in more general terms, are more resilient.

Most of those employed in the CCSs are either employed in small companies (SMEs) or self-employed. When analysing self-employment it appears that it covers a very wide diversity of professions, ranging from culture and the arts to amusement activities, betting and gambling or sport. Therefore, available data does not allow for a correct identification of trends as regards in self-employment in the CCSs.

It also should be noted that different European countries show diverse situations which make it difficult to compare larger countries such as Germany, France or Italy with smaller ones such as Estonia, Luxemburg, Malta, etc. Moreover, in some cases the overall population of a one given country is lower than that of regions or cities in another: for example, the total population of Croatia is equivalent to 50% of the population of London. Thus, analysis should be eventually carried out at different territorial levels, depending on the situation and, in some cases the analysis of the CCSs appears to be better focused if carried out within smaller territories rather than at country level especially in the cases of larger countries where it is difficult to identify micro data and, consequently, identify development trends.

Public policies geared to foster culture and creativity have a stronger impact at sub-national level, in a limited number of regions (as is the case of the creative clusters). Although the study provides for a macro analysis it, nevertheless, enables for the identification of the criteria to determine what are the most relevant environments where culture and creativity can flourish.

A new analysis of the 2014 Regional Innovation Scoreboard, while looking in a wider context provides further evidence that the intra-country differences in terms of concentration of the ICT sector and related jobs are much higher than in other sectors. The high correlation of the CCSs with the most innovative sectors of the economy suggest that localized interventions that are geared to the unique contexts of these labour markets need to be considered when promoting the cultural job market as well.

As stated on several occasions in the study, culture and creativity flourish in territorial “clusters” albeit in specific countries. Conversely, these clusters have direct or indirect spill-over effects on other sectors, industrial or not, and also beyond the specific territory where they are located. This shows that although this study has applied the “from general to particular” approach, the reverse approach might prove to provide interesting results.

Finally, in a period when public and private budgets decrease it is important that public policies aim at fostering both cultural participation and consumption of cultural goods and services in order to boost the development of the cultural and creative sectors through direct market revenue. Also due consideration should be given to the importance that regulating labour markets can impact strongly on the development of the CCSs.

The study concludes that its further scope to:

- Identify creative clusters where to carry out specific research in order to provide policy makers with a more detailed dimension of the phenomenon. In this sense, it might be interesting to focus research on medium-sized cities (or on specific areas of larger-sized cities).
- Include social indicators in the analysis of the cultural and creative sectors since they provide for a good approximation to the creative environment.
- Collect, in the coming years, a data set to track the development of the cultural and creative sectors and emphasize the different development trends at different territorial levels.
- Make available both quality open-data in the cultural and creative sectors as well as the existing research on the impact of cultural and creative policies since this provides very useful tools for all those professionals wanting to operate in the sector.
- Stimulate transparency as regards public funding, both at national and local levels, for the cultural and creative sectors not only as concerns its end-results but, rather, as regards the overall process leading to the granting of funds. This enables for a sense of ownership built on trust from the cultural professionals as well as from civil society at large. Ultimately, it fosters the development of the sector itself.
- Identify, in detail, the parameters and categories that define both cultural and creative professionals as well as the cultural and creative sectors.
- Carry out a deeper analysis should be carried out on the so-called “Secondary resilience”, i.e. the relations between the CCSs and the other economic sectors and the impact of cultural policies in the economic environment.

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Robert Manchin is a social scientist, economist, professor and lecturer. He is the Chairman and Managing Director of Gallup Europe and has been conducting empirical social research for the last 40 years, initially as a researcher at the Hungarian Academy of Sciences, and in the last 20 years at Gallup in the USA and in Europe. A Professor at the College of Europe, Bruges, Belgium, he is involved in a number of graduate university programmes in Europe. He has worked on the Eurobarometer Candidate Countries for the European Commission (EC) and in the last 4 years, the EC’s Flash Eurobarometer, Europe’s largest on-going measurement project, serving the information needs of Europe’s public policymakers. He also directed various large-scale surveys on wellbeing in Europe, the last 2 European Working Condition Surveys for Eurofound, the EU-wide MIDI Survey of immigrant and ethnic minority groups’ experiences on discrimination and victimisation for the Fundamental Rights Agency, among others. He initiated and continues to lead the Gallup Balkan Monitor and is in charge of the European part of the largest ongoing survey on behavioural economics study on wellbeing of the Gallup World Poll and Soul of the City. He is a specialist in: social audits for the public sector, including local and regional government administrations, school-systems, health; research programs monitoring economic expectations, political, and social trends; data and survey-based information on governance issues; performance indicators for the quality of education, healthcare, and other public services; the use of micro-data for policy decision and social impact studies; the use of data and survey-based information creating performance indicators for the quality of educational, health and various other public services. He holds a degree in Economics from the Karl Marx University of Economics, Budapest, Hungary; in Music from the Liszt Ferenc Academy of Music, Budapest, Hungary; and in Sociology from MacMaster University, Ontario, Canada. In 2006, Robert was elected as Deputy Mayor of Vallus, Hungary. Since 1994, he runs the Foundation Europa Nova, promoting social innovations in local scale in Hungary and Croatia. He also is a Trustee of the Brussels-based think-tank “Friends of Europe.” Hungarian is his mother tongue; he is fluent in English and German.

Foreword

On April 10 2014, the Directorate General for Education and Culture of the European Commission - Unit E1 (DG EAC/UNIT E1) submitted to the European Expert Network on Culture (EENC) a “*Request for a study on the resilience of employment in the Culture and Creative Sectors (CCSs) during the crisis, the percentage of youth employment in the CCCs, and the projections of employment and growth of the CCCs notably in the digital environment*”.

On the basis of the brief enclosed with the request, the EENC developed a proposal to carry out a study in the 28 European Member States that consists in collecting and analysing public data as regards culture, creativity and the new technologies with the following overall aim:

- ✓ To present statistical and policy evidence supporting the assumption that employment in the Culture and Creative Sectors (CCSs) has proven to provide for a certain degree of resilience during the years of the financial crisis in Europe.

And in particular to provide also the following:

- ✓ A summary of updated information on the employment in the CCSs (notably youth employment) and its comparative resilience during the crisis in different Member States taken from existing bibliography and available statistics (among others, from Eurostat);
- ✓ A set of comparative examples highlighting the labour-intensive character of the CCSs, notably in relation to youth employment;
- ✓ A preliminary projection of jobs and growth in the CCSs, notably for the young.

To this end a data base collecting data available from public statistical institutions, especially from Eurostat, has been compiled.

The data base, attached in digital format to the present report, can be exploited for a short comparison of the data available in the 28 Member States and can be queried for different topics.

Methodology

To correctly define the remit of the analysis to be carried out it has been important to also define its limits. Indeed, the request by DG EAC/UNIT E1 presents different questions discussed in this paragraph which are essential for the comprehension of the results and the data analysis.

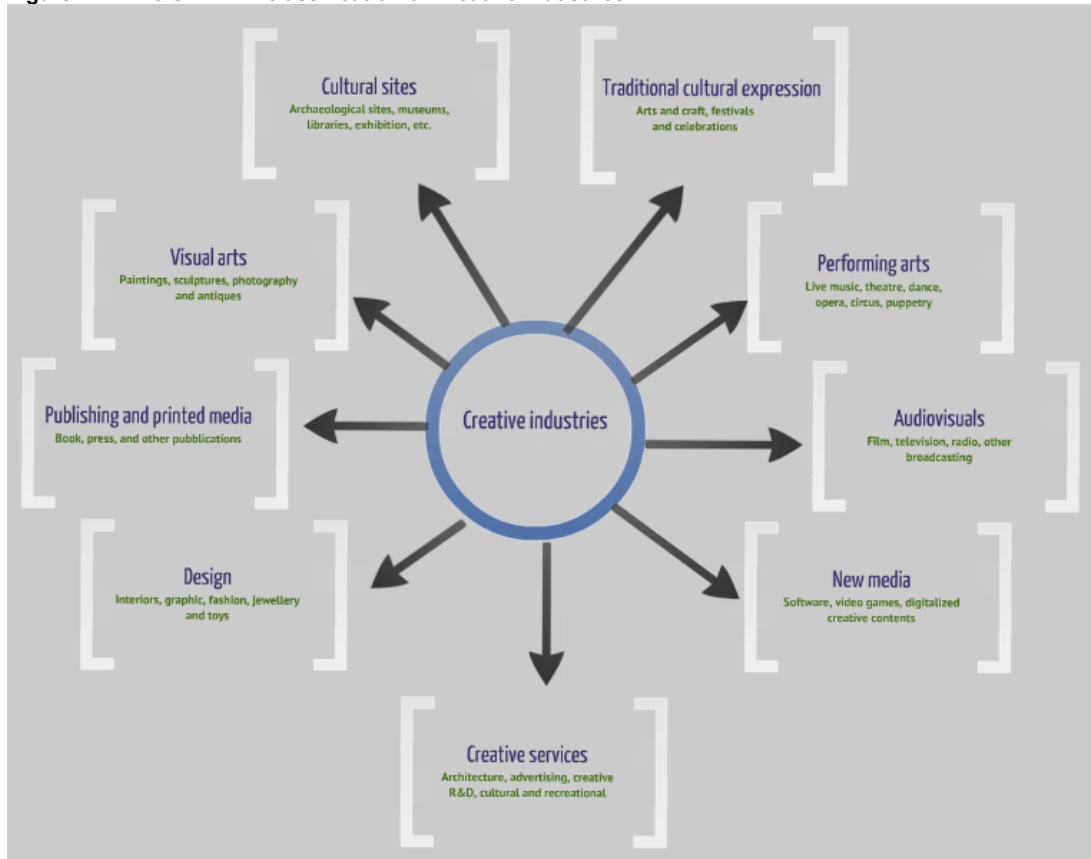
Classification

The international debate on what the “creative industries” encompass started in 1998 with a document published by the UK Department for Culture Media and Sport (DCMS) entitled “Creative industries mapping document”.

After this pioneer document a series of studies have been carried out to better define the sector and to analyse the contribution made by intangible assets such as “culture” and “creativity” to the economy, as a whole.

Among others, one of the wider classifications was elaborated by UNCTAD (United Nations Conference on Trade and Development) and is summarized in the following figure:

Figure 1. The UNCTAD classification of Creative Industries



Source: elaboration by UNCTAD

Focusing on this classification, the most relevant consideration is that there is a very wide range of “sectors” and activities that can be considered as “creative”: from the arts and antiquities to the “creative services” or the production of videogames and toys.

The question about which are to be considered as “creative professionals” is not an easy one to answer. Indeed, studies that address the issue of creative professionals and of employment in the creative sectors, consider as “creative” many different types of professions. In general terms, all those that work with intellectual sources can be considered as “creative professionals”. The term thus encompasses very diverse professions, ranging from actors, dancers, archaeologists and designers to lawyers or other intellectual professionals.

Therefore, and in accordance with the DG EAC/ UNIT E1, it was decided that for the scope of the study the legal basis of the “Creative Europe” program would be used by which the “*cultural and creative sectors*” englobe “*all sectors whose activities are based on cultural values and/or artistic and other creative expressions, whether those activities are market- or non-market-oriented, whatever the type of structure that carries them out, and irrespective of how that structure is financed. Those activities include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. The cultural and creative sectors include inter alia architecture, archives, libraries and museums, artistic crafts, audio-visual (including film, television, video games*”

*and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts”.*¹

To delimit the cultural and creative sector for the scope of this study, where possible, NACE codes with 3 digits were used. The following are the codes selected to this end:

- ✓ J) Information and communication
 - 58 - Publishing activities
 - 59 - Motion picture, video and television program production, sound recording and music publishing activities
 - 60 - Programming and broadcasting activities
- ✓ R) Arts, entertainment and recreation
 - 90 - Creative, arts and entertainment activities
 - 91 - Libraries, archives, museums and other cultural activities

Nevertheless, in addition to this wide classification and in order to include ICTs, the study has also taken into consideration other parameters (J61, J62 and J63) to describe employment and future job opportunities for this sector.

When available, the figures also show the second level of classification. Nevertheless, for the self-employed this second level of classification is not possible given that data are only available for the general level through the following codes:

- ✓ J) information and communication
 - 61 - Telecommunications
 - 62 - Computer programming, consultancy and related activities
 - 63 - Information service activities
- ✓ R) Arts, entertainment and recreation
 - 92 - Gambling and betting activities
 - 93 - Sports activities and amusement and recreation activities

As regards employment in the CCSs the NACE codes R58, R59, R60, J90 and J91 have been used and, as regards the ICTs, data from NACE J61, J62 and J63 have been used.

Resilience

A general definition of the term “resilience” refers to the ability of a system/individual/material to cope with changes, stressful events, damages, etc. by conserving its initial balance. This concept has primarily been used in the fields of physics, natural science, engineering and then embraced by other scientific disciplines such as psychology (“the ability of an individual to face negative events or periods by maintaining his balance”), management (“the capacity of an organization to anticipate disruptions, adapt to events, and create lasting value”), etc. In the context of the present report, the term “resilience” is used with its economic meaning², both in its *instantaneous* and *dynamic* acceptations.

¹ See European Union, Regulation No 1295/2013 of the European Parliament and of the Council, 2013, art. 2 at www.eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32013R1295&from=EN.

² The main definition of this concept was given by the World Bank Group which identifies *macroeconomic resilience* with: “The ability of the economy to cope, recover, and reconstruct and therefore to minimize aggregate consumption losses. Macroeconomic resilience has two components: *instantaneous resilience*, which is the ability to limit the magnitude of immediate production losses for a given amount of asset losses, and *dynamic resilience*, which is the ability to reconstruct and recover.”. Hallegatte, Stephane, (2014), *Economic resilience: definition and*

In fact, this concept is currently used to describe the positive (or “not so negative”) trends of macro-economic and social variables such as occupation, GDP, investments, in relation with negative exogenous shocks or endogenous dynamics occurring in an economic system.

Therefore, the resilience of the occupation in the CCSs – main subject of this report - relates to the proven ability of this variable to face the big economic “stressful events” occurred in the last decade (the well-known financial and economic “crisis”) by reacting with positive dynamics and trends, both in absolute and in comparative terms (in particular, in relation with the performance played by the whole occupation).

An additional meaning that we have given to this concept relates to the contribution that – during the last decade – the CCSs have made towards the resilience of the UE economic and social systems, understood for the scope of this report as the ability of the different countries analysed to maintain or improve their economic and social conditions, including the issue of wellbeing, in terms of social inclusion, security, civic sense, etc.

Comparability

Another important point is the one regarding the comparability of data. In this respect, it was decided to use data mainly published by official sources and, to avoid the risk of different methodologies of collection and elaboration of data, the most complete data set for the different parameters was taken into consideration through official sources.

In general terms, and following many economists and researches, culture and creativity can develop a strong impact on the economies, especially in Europe and can have different impacts that can be described twice: a direct impact and an indirect impact.

The direct impact can be represented by many economic and social indicators (GDP in the CCSs, employment in the CCSs, etc.) whereas, on the contrary, the indirect impact is often difficult to calculate due to the difficulty in the computation of the so-called externalities.

This second aspect is very important because the most powerful impact of culture and creativity is considered as an externality. Indeed, the impact of production in the cultural and creative sector can spread its effects to many other sectors without there being a price paid for such “economic transactions”. To illustrate this, the tourism sector provides for easy-to-grasp examples: the benefits to tourists of activities related to heritage or the performing arts sector are evident but such benefits are not paid for by tourism operators but from the citizens by paying taxes. Although it is not among the objectives of this study, it is quite clear that an analysis of the connections between the CCSs and other economic sectors could provide evidence of what could be, eventually, called a “secondary resilience”.

Another statistical problem in terms of comparability is posed by the fact that the experience of cultural consumption can be measured by many indicators none of which can be considered exhaustive: if we consider as cultural indicators only items such as the number of books or of tickets sold, the number of attendants or other indicators (economic or not), a lot of relevant information regarding the quality and the relations of the cultural sector with the general environment would be lost.

This is the reason why the data collected are not always directly connected with the core of the study but are necessary to give a wider range of parameters to better understand the

different situations in each country as well as the different policies needed at the European, National and local level.

Young people

To define young people in the “liquid society” is not easy. In general terms many studies consider as “young” those between 15 and 24 because these cover the years spent in school but, in some countries, those younger than 35 are also considered as “young people”.

Against this background this study has taken into consideration data for those aged between 15 and 24 and, when available, also for those between 15 and 29. Where necessary, the distinction has been made as to the age range applied.

Crisis

On September 15, 2008 one of the most important international banks, Lehman Brothers, declared to have filed for Chapter 11 - bankruptcy protection. This is considered as the official starting date of the last financial crisis that has become, in the following years, a deep economic crisis in the Euro-American area. Europe is still affected by a period of stagnation that is more than a financial crisis and, in this context, it is difficult to understand whether the financial situation is a cause or an effect rather of a much deeper crisis, both economic and social.

Over the last few years the debate on economic growth and development has been strictly connected with the social environment and competitiveness has been often considered as part of an obsolete vocabulary that should be partially modified. While theory wants that in a competitive economy a company in crisis should stop producing and fire its employees because the market rules will drive the market towards a new equilibrium, in the last years many countries have set up public policies to save companies from market failure. This implies the failure of the market rules and the emerging of new public policies fostering new models of a sharing economy.

In this context, and in agreement with the DG EAC / UNIT E1, it was decided to focus the research on data for the years between 2007 and 2013 (for the latter, when available).

As for the definition of the economic context, it was decided to collect figures for the following general items:

- ✓ GDP,
- ✓ GDP *per capita*,
- ✓ employment,
- ✓ employment in the creative sector,
- ✓ total labour force,
- ✓ total labour force in the creative sector,
- ✓ % of the creative GDP in the CCS's.

After a thorough analysis of the sources available, the field under analysis has been widened and the number of indicators has been increased.

As regards the latter and with the aim of taking into consideration not only economic and social indicators, it was decided to include also “trust indicators”. This choice stems from the

consideration that the cultural and creative sectors are better developed, or have a good chance of development, in regions and countries in which the quality of social relations is strong. It is two-way relation, both as a condition and also as one of the most important social outcomes: “trust indicators” can, in fact, give an idea of the context for each country and can describe the environment where the CCSs are most developed.

Other indicators that have been included are:

- ✓ female participation as a proxy measure to understand the quality of social inclusion;
- ✓ data on crime or participation in social life as another proxy measure of social cohesion;
- ✓ sectorial data in order to analyse in depth the cultural and creative sectors.

The study has applied the following methodology:

Mapping of relevant literature.

To carry out this study a preliminary desk research identified policy documents, research reports, comparative research frameworks (e.g. the *Compendium on Cultural Policies and Trends in Europe*), articles and other written evidence relevant for the subject matter.

Economic analysis.

Existing data in literature and in public statistics (Eurostat, *Compendium on Cultural Policies and Trends in Europe*, etc.) were collected and analysed. All the collected data were combined with the range of other variables, as those listed above (e.g. GDP *per capita*, employment, etc.), in order to analyse the trends in employment in the CCSs in the years under study. When possible, longer-term trends were outlined.

Analysis of national evidence.

Based on the available data short national profiles of the 28 EU Member States have been produced. In order to complete the profiles, and in agreement with DG EAC / UNIT E1, some on line interviews with experts were carried out, including national experts in the field under study.

Best (and worst) practices in the field of employment policies in the CCSs.

The research has not provided elements for interesting practices, implemented either at national or regional level, to boost and support employment in the CCSs.

The European scenario

Trends in Europe

In the next pages general data are analysed to better understand the overall as well as the general environment in Europe. To allow for a better comparison between data shown in this section and data shown in the following it was decided to set the year 2008 as the base-year. This for two reasons: the first is that data concerning the CCSs are available only as of 2008; the second is that the economic and financial crisis started in 2007 and that the trends started to show a decrease from 2008.

The first data shown regards European population: while the total population has grown in the past 10 years about 3,4%, for the same period young population³ has decreased about 8%.

Data confirms the general trend of ageing in Europe (figure 2).

Figure 2. Trends of population and young population in Europe (2008=100)

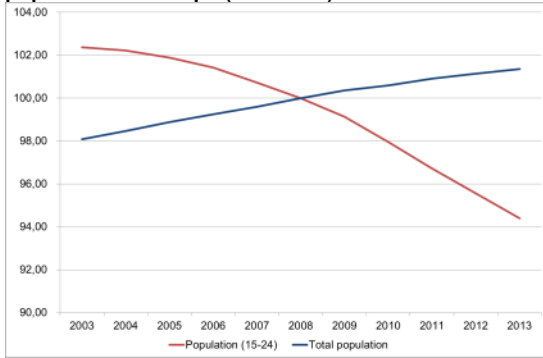
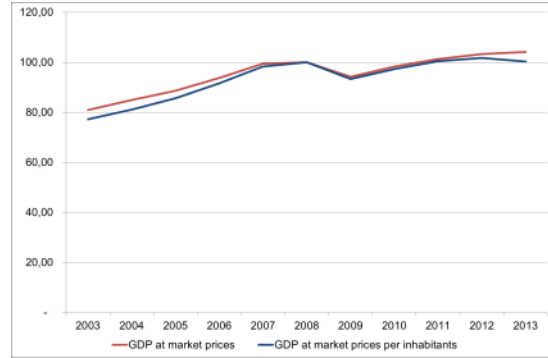


Figure 3. Trend in GDP in Europe (2008=100)



Source: Eurostat, own elaboration on Eurostat data

The financial crisis that started in 2007 has had a very strong impact on the general economy indicators. The figure above (figure 3) shows the trends of the Gross Domestic Products at market prices and for inhabitants in the period between 2003 and 2013. The worst period was between 2008 and 2010 and, after 2011, GDP started to grow again albeit at a lower rate. Because of the population growth in the same period, GDP per inhabitant grows less than the general figures.

The figure below (figure 4) shows the trend in public expenditure in the last ten years: from 2008 the increase of public expenditure is not as fast as before due to the financial crisis that affected the public sector and implied a growth of national public debts.

Figure 4. Trend in public expenditure in Europe (2008=100)

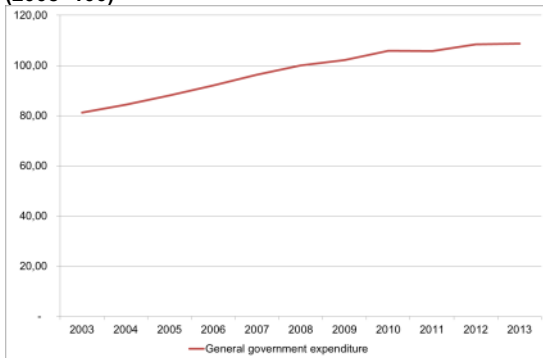
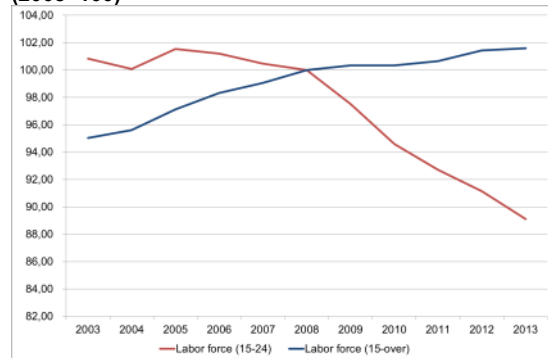


Figure 5. Trend in labour force in Europe (2008=100)



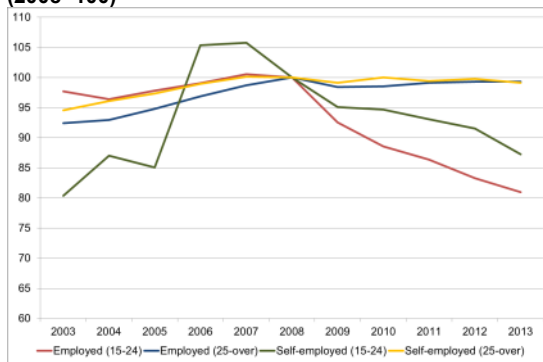
Source: Eurostat

Following the trend of the population, the labour force in the 10 years in question has increased: Figure 5 shows that the total labour force is growing but that this is not true for young people.

³ Eurostat defines as “young population” those aged between 15 and 29; for the scope of this study the “young population” is the one aged 15 to 24: to this end data has been cleared of information regarding those aged 26 to 29.

In general young Europeans are facing a very deep crisis. The following figure shows the trends of employed and self-employed for different age categories: while the number of the employed and self-employed above 25 remain at about the same level as that of 2008, the number of the young employed and self-employed has strongly decreased in the last 5 years (figure 6).

Figure 6. Trend in employment in Europe (2008=100)



Source: Eurostat

In general this charts shows that, at the same age, the self-employed react in a better way if compared to those who are employed.

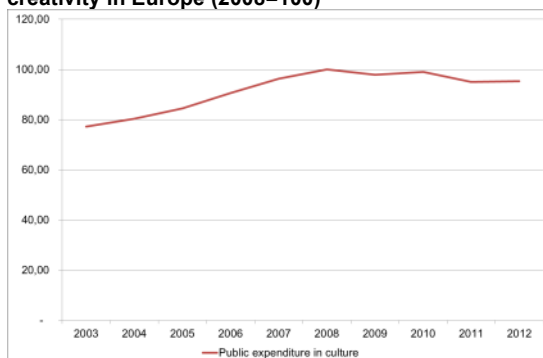
The cultural and creative sector

The cultural and creative sectors are usually subsidized through public funding. The following chart shows the trend in public funding in Europe using the following COFOG nomenclature:

- ✓ Broadcasting and publishing services
- ✓ Cultural services
- ✓ R&D Recreation, culture and religion
- ✓ Recreation, culture and religion

As the graph below shows, from 2003 to 2008 public expenditure in culture and creativity at market price registered an increase; whereas, from 2008 to 2012 (the last year available) it decreased slightly of about 5% (figure 7). In general terms, funding for culture and creativity has registered a slight decrease, especially from 2007.

Figure 7. Public expenditure in culture and creativity in Europe (2008=100)



Source: Eurostat

Figure 8. Contribution of CCSs to GDP (2008=100)

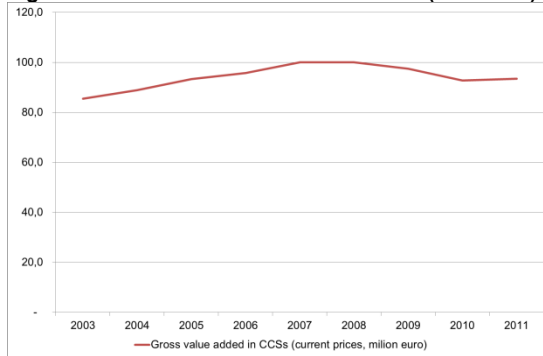
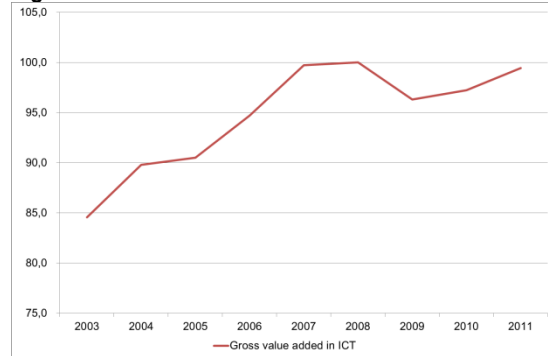


Figure 9. Contribution of ICTs to GDP



Source: Eurostat

As Figure 10 shows, while the employed and self-employed suffer from the crisis, those that work in the cultural and creative sectors face a better situation especially as regards the self-employed in the “Information and communication” sector but also those in the “Arts, entertainment and recreation” sector .

A similar consideration can be made as regards the employed: since the cultural and creative sectors show a growing, albeit cautious, trend they are in a better situation with respect to those employed in other sectors.

Nevertheless, the last year (2013) shows a changing situation insofar as the “Information and communication” sector registers a loss of employed and self-employed.

Figure 10. Trends in employment and self-employment in Europe in NACE J and NACE R compared with total employment and self-employment (2008=100)

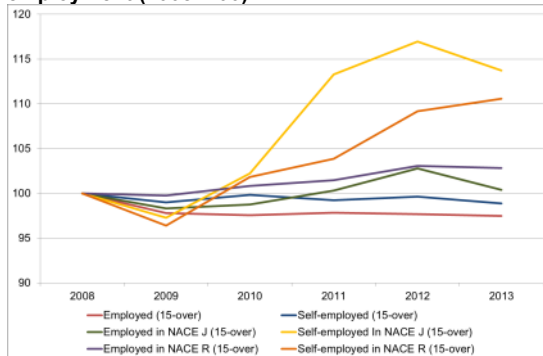
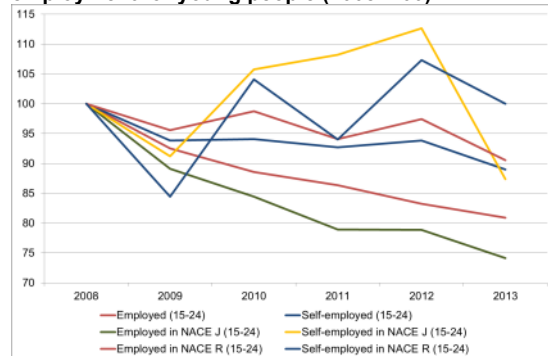


Figure 11. Trends in employment and self-employment in Europe in NACE J and NACE R compared with total employment and self-employment for young people (2008=100)



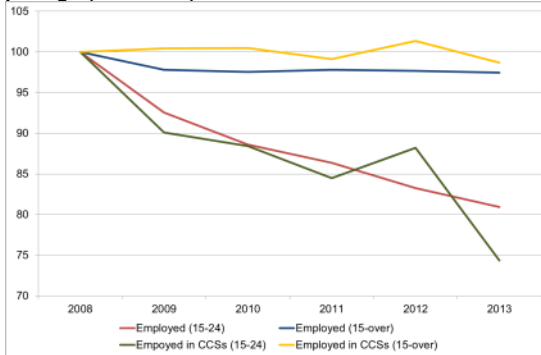
Source: Eurostat

Similar considerations can be made as regards young people: those that are self-employed seem to be more resilient than those that are employed. Moreover, those working under a self-employment regime in the cultural and creative sectors appear to be better positioned than their colleagues working in other sectors. Nevertheless, it must be pointed out that this is not true for the employed that work in the “Information and communication” sector since they register the worst situation at the end of the period.

As shown above, the cultural and creative sectors are better described by using the second level of NACE coding; nevertheless, it should be pointed out that the analysis of employment situations applying this second level of NACE coding is possible only for the employed and not for the self-employed.

The following graph illustrates the trend for workers in the CCSs. While the employed in the cultural and creative sectors show a resistance after the crisis and their performance is better than the general trend, for young people this trend is not respected. Those working in the CCSs fare less well than their older colleagues (figure 12).

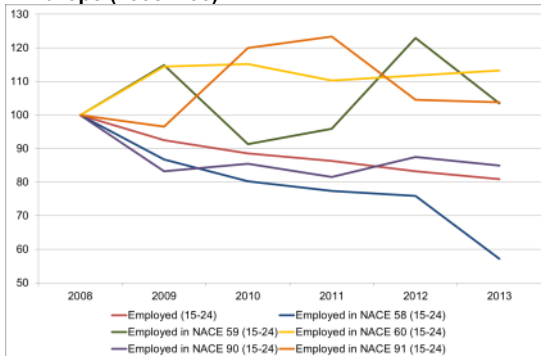
Figure 12. Trend in Employment in CCSs in Europe per age (2008=100)



Source: Eurostat

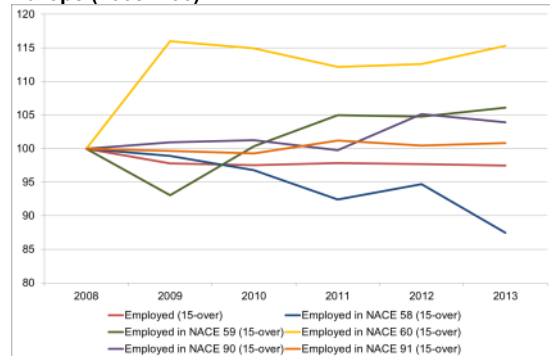
The following chart shows the trend for young people in every sector (figure 13) and, when compared to the overall employment situation of the adult labour force (figure 14), enables for a detailed analysis of the trend depicted above.

Figure 13. Trend in Employment for young people in Europe (2008=100)



Source: Eurostat

Figure 14. Trend in Employment for adult people in Europe (2008=100)



For instance, in the 6 years analysed (2008-2013) employment of young people in “Publishing activities” (NACE J 58) shows a very strong decrease, falling of about 40%; and employment in “Creative, arts and entertainment activities” (NACE R 90) registers a better overall performance although it shows a loss of about 15% of employed throughout the period.

A significant growth is registered in employment in “Libraries, archives, museums and other cultural activities” (NACE R 91) where, at the end of the period, there is a growth of more than 3%. This is also the case for employment in “Motion picture, video and television program production, sound recording and music publishing activities” (NACE J 59). Both sectors indeed register a fluctuating trend in the last two years analysed. A more stable growth trend is registered as regards the employed in “Programming and broadcasting activities” with an increase of 13%.

Figure 14 shows the trend followed by employed adults. In the CCSs a negative performance is registered only for those employed in “Publishing activities” (NACE J 58). All other sectors register a growing trend: +3,9% for the “Creative, arts and entertainment activities” (NACE R 90); +6,1% for “Motion picture, video and television program production, sound recording and music publishing activities” (NACE R 59); +15,3% for “Programming and broadcasting activities” (NACE R 60).

ICT and technologies

The analysis of the situation as regards the ICTs has been carried out by collecting data from Eurostat, using indicators in the sector and data on employment in 3 NACE sectors.

The indicators chosen are: the number of fixed telephone subscriptions per 100 inhabitants; the number of mobile subscriptions per 100 inhabitants; the number of fixed and wired subscriptions per 100 inhabitants and the percentage of individuals that use the Internet.

The following chart shows the average indicators in Europe as regards equipment and use of new technologies (figure 15).

From 2003 onwards, fixed telephone subscriptions decrease, in average, an 8% while mobile subscriptions rise, also in average, 49,4%. As regards broadband it reaches 26,8% of the population in 2013, whereas it was at 4,6% in 2003. The number of persons using the Internet reached an average of 75,2% in 2008 starting from 40% in 2003 (figure 16).

To analyse employment trends, data was collected from Eurostat for the following sectors:

- ✓ J) information and communication
 - 61 - Telecommunications
 - 62 - Computer programming, consultancy and related activities
 - 63 - Information service activities

Figure 15. Fixed telephone, Mobile and broadband subscription per 100 inhabitants (European average)

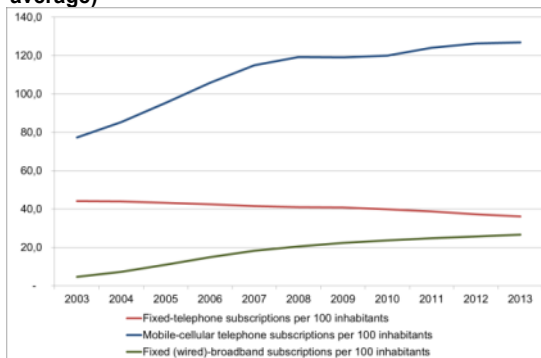
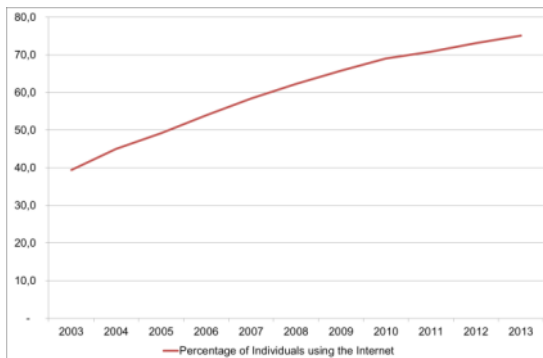


Figure 16. Percentage of Individuals using the Internet in (European average)



Source: Eurostat

The following charts show the general trend of employment in ICTs in EU Member States (figures 17 and 18). The average growth of employment in the ICTs is the result of the growth of employment in “Computer programming” (NACE 62) which drives the growth of the sector as a whole: in fact, they represent 1,3% of the total employed and the highest number of those employed in the ICTs. A positive trend is registered as regards those employed in the “Information services” (NACE 63) although they represent only 0,2% of the overall employed. The only sector that shows a negative trend is that of “Telecommunications” (NACE 61) that, as of 2008, loses 21,3% of the employed.

Figure 17. Trend in ICT Employment in Europe

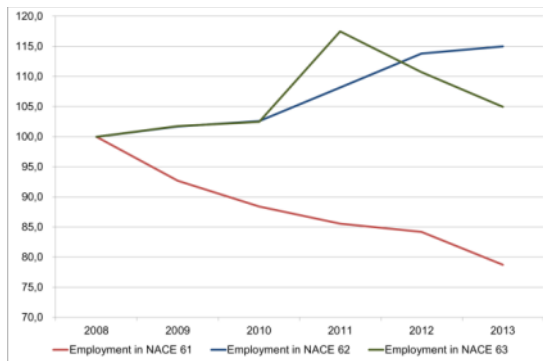
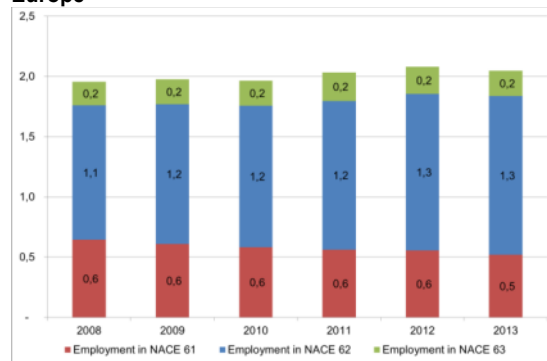


Figure 18. Composition of ICT Employment in Europe



Source: Eurostat

Comparison among European countries

Before analysing every individual country, this paragraph highlights the main differences existing between European countries through a brief comparison of a selection of 6 main indicators:

- Public expenditure in culture on General public expenditure
- Participation in cultural life
- Employment in CCSs on general employment
- Individuals using the Internet
- Contribution of ICTs to GDP
- Employment in ICTs on general employment

The following tables show the main indicators for each Member States (table 1) and the countries' position as regards the main indicators (table 2):

- ✓ the country with the highest number of employed in the CCSs is Estonia (2,77 per 100 employed), the one with the lowest is Romania (0,7 per 100 employed);
- ✓ the country with the highest number of employed in the ICTs is Sweden (2,97 per 100 employed), the one with the lowest is Romania (1,15 per 100 employed);
- ✓ the country with the highest public expenditure in culture is the Czech Republic with 7,8% of general public expenditure whereas Greece is the country with the lowest (1,9%);
- ✓ the country with the highest participation in cultural life is Finland (59,8%) and the one with the lowest is Bulgaria (12,2%);
- ✓ the country where the Internet has the highest rate of penetration is Sweden (87,8%) and the one with the least is Romania (24,7%).

Table 1. Main indicators per country

	Employment in CCSs	Employment in ICT	% of Public expenditure in Culture	Visits to cultural sites	% individuals using the Internet	GDP in ICT on total
Austria	1,57	2,00	3,1	39,2	63,6	2,31
Belgium	1,48	2,39	2,4	41,6	59,7	2,96
Bulgaria	1,30	1,78	3,9	12,2	27,1	4,21
Croatia	1,50	1,75	5,1	n/a	38,0	n/a
Cyprus	1,29	1,62	3,7	25,6	35,8	3,11
Czech Republic	1,70	2,10	7,8	44,0	47,9	3,70
Denmark	2,43	2,91	4,1	54,3	86,7	2,83
Estonia	2,77	1,96	7,8	34,4	63,5	3,58
Finland	2,36	2,99	3,2	59,8	79,7	3,15
France	1,73	1,83	4,1	44,3	46,9	3,23
Germany	2,01	1,63	2,8	59,1	72,2	2,49
Greece	1,19	1,52	1,9	14,8	32,3	3,13
Hungary	1,71	2,03	6,3	41,1	47,1	3,21
Ireland	1,54	3,62	3,4	35,5	54,8	4,29
Italy	1,20	1,89	2,2	24,5	38,0	2,99
Latvia	n/a	2,07	7,6	n/a	53,6	n/a
Lithuania	n/a	1,26	4,1	30,1	43,9	2,28
Luxembourg	1,21	2,85	6,8	51,4	72,5	-
Malta	1,20	2,96	3,8	14,4	40,4	4,44
Netherlands	1,80	2,35	5,5	49,7	83,7	3,26
Poland	1,30	1,62	4,3	31,3	44,6	2,32
Portugal	1,04	1,40	3,2	30,6	38,0	2,71
Romania	0,70	1,15	2,8		24,7	3,13
Slovakia	0,87	1,86	2,6	44,4	56,1	3,46
Slovenia	2,26	2,19	6,6	39,4	54,0	2,87
Spain	1,27	2,30	2,7	43,2	50,4	2,91
Sweden	2,30	2,97	3,2	58,3	87,8	3,52
United Kingdom	2,12	2,67	3,4	52,4	68,8	4,20

Source: our elaboration on Eurostat

Table 2. Country position for the main indicators

Country	Employment in CCl /Employment	Employment in ICT /Employment	Public Expenditure in Culture /General government expenditure	Participation	% of Individuals using the Internet	GDP in ICT on total	Average
Denmark	2	5	10	4	2	6	4,8
Finland	3	2	19	1	4	14	7,2
Sweden	4	3	18	3	1	19	8,0
Luxembourg	20	6	4	6	5	n/a	8,2
Netherlands	8	9	7	7	3	17	8,5
Slovenia	5	11	5	14	13	7	9,2
Latvia	n/a	13	3	n/a	14	n/a	10,0
Germany	7	22	23	2	6	4	10,7
United Kingdom	6	7	17	5	7	22	10,7
Estonia	1	16	2	17	9	20	10,8
Czech Republic	11	12	1	10	16	21	11,8
Austria	12	15	21	15	8	2	12,2
Hungary	10	14	6	13	17	15	12,5
Belgium	15	8	26	12	10	9	13,3
France	9	19	11	9	18	16	13,7
Ireland	13	1	16	16	12	24	13,7
Spain	19	10	24	11	15	8	14,5
Poland	16	23	9	18	19	3	14,7
Lithuania	n/a	27	12	20	20	1	16,0
Croatia	14	21	8	n/a	24	n/a	16,8
Slovakia	25	18	25	8	11	18	17,5
Malta	22	4	14	24	21	25	18,3
Cyprus	18	24	15	21	25	11	19,0
Portugal	24	26	20	19	22	5	19,3
Italy	21	17	27	22	23	10	20,0
Bulgaria	17	20	13	25	27	23	20,8
Greece	23	25	28	23	26	12	22,8
Romania	26	28	22	n/a	28	13	23,4

Source: our elaboration on Eurostat

Country profiles

Many international studies underline that the “creative economy” is the result of policies in different segments of public policies and that the factors that illustrate the development of creativity can be different depending on the country due to the different existing situations, traditions, income and skills levels, etc.

In order to offer a quick classification of the different starting points for the 28 EU Member States included in the study, data from different sources has been collected with the aim of giving a brief overview for each country. In particular, data has been collected as regards the supply side in culture, the demand for cultural goods and services, the employment situation in every country; as already indicated, indicators on trust have also been included.

Each profile is structured in the following sections:

- ✓ General information; this section includes general information on every country, including its date of accession to the European Union;
- ✓ Social environment: the cultural and creative sectors are developed in countries, especially in towns, where there is a strong attitude of openness and tolerance towards diversity. This is the reason why this section shows data on women’s participation in the labour market and also includes a few “trust” indicators that can give a dimension of the openness and tolerance in the country.
- ✓ Culture and Creativity: to understand the resilience of the employment in a country, an economic analysis is necessary, therefore this section shows, on the one hand, the trend in a given country’s GDP, directly related with the CCSs and, on the other, the role of public policy in cultural and creative industries given its importance in understanding public engagement in the cultural sector;
- ✓ Demand and Supply of Culture and Creativity: this section sets the framework for the cultural supply and demand necessary elements to understand the general environment in which cultural production happens.
- ✓ Education: another important aspect of the creative sector is education and this section highlights the trends as regards certain undergraduate study subjects;
- ✓ Employment and young employment: the section offers an insight of trends in general employment, on the one hand, and in the employment of young people, on the other, as regards the CCSs;
- ✓ Information and Communication Technologies: this last section analyses the data available for elements such as mobile communication, broadband subscription, use of the Internet and employment in the ICT sector.

AUSTRIA

Austria is a country with about 8,5 million inhabitants and has been a member of European Union since 1995. In the last 10 years, population has registered a slight growth of about 4,2%. The young are over 1 million and after a first 5-year growth cycle, as of 2008 the situation is stable.

Figure 19. Trend in population in Austria

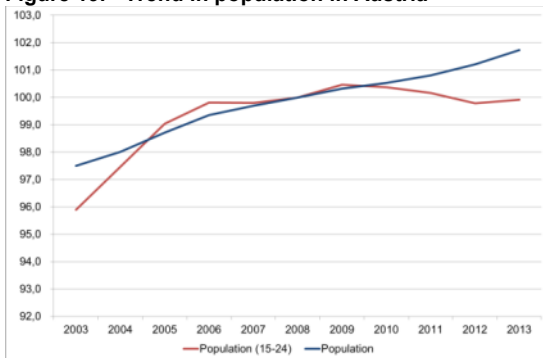
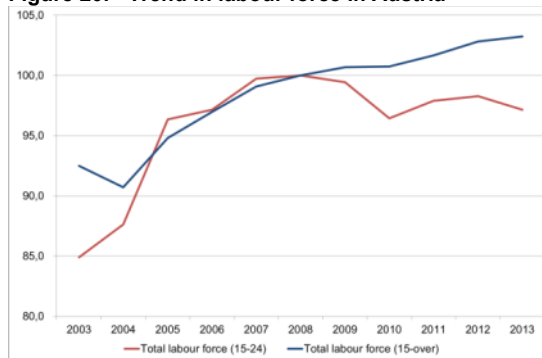


Figure 20. Trend in labour force in Austria



Source: Eurostat

The following graphs show the trend in Gross Domestic Product and general government expenditure. The Austrian government faced the crisis period using public expenditure to balance the effect of the economic depression. After 2009, GDP and GDP *per capita* started again to grow as did the general public expenditure, albeit at a lower rate. One of the effects of the crisis has been an increase in the difference between the poor and the rich: in fact Figure 21 shows that GDP has grown at a faster rate than GDP *per capita*.

Figure 21. Trend in GDP in Austria

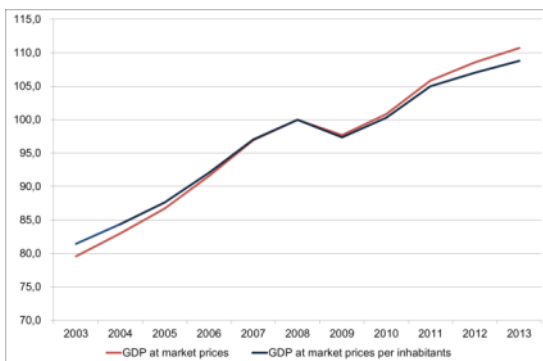
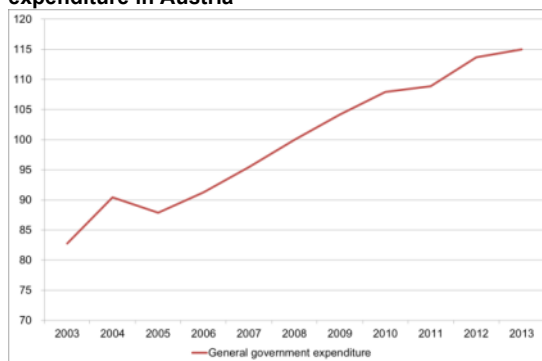


Figure 22. Trend in general government expenditure in Austria



Source: Eurostat

Although in general terms the crisis has not affected the country much, the following chart shows that the young employed have instead suffered severely from the crisis: total employment registered a growth of 2,1% while the employed between 15 and 24 years registered a loss of 4% in 5 years (figure 23). The following chart also shows the fluctuation of the young self-employed. In this case raw data on self-employment are probably not collected in the same way as for employment. Anyhow, it appears that the general trend for the young Austrian people is to switch from an employment to a self-employment situation.

In general, after 2008 employment and self-employment registered a slight growth of about 2%.

Figure 23. Trend in employment in Austria

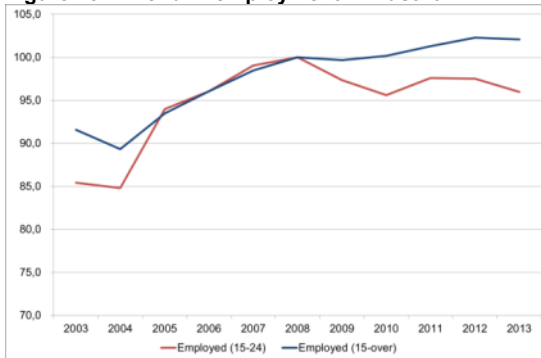
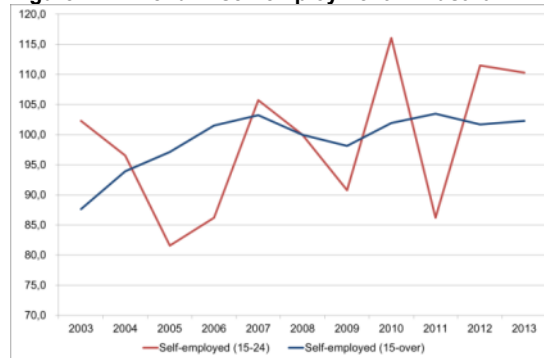


Figure 24. Trend in self-employment in Austria



Source: Eurostat

Social environment

After the crisis, in 2008, female employment registered a growth of less than 4,5% while for the young people the following graph shows a loss of more than 4,6%. Participation of the females to the labour market is high (more than 46% of the employed are female) but after the crisis, the young females have registered a strong stop losing position in the gender equality distribution of job.

Figure 25. Trend in female employment in Austria

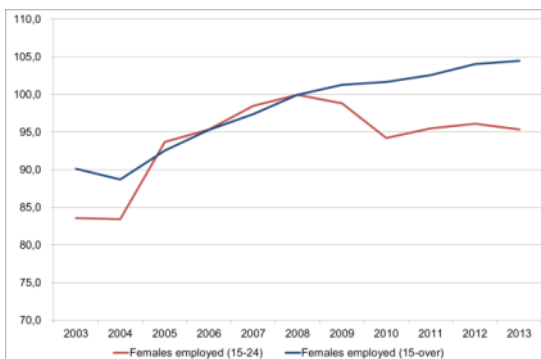
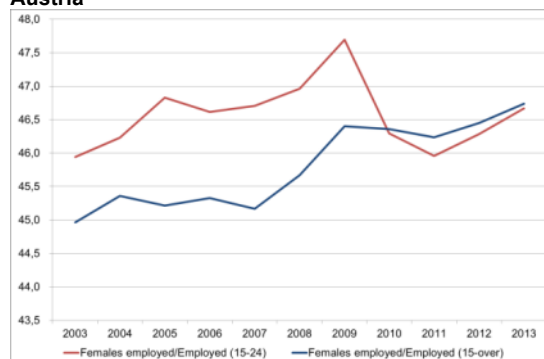


Figure 26. Female participation to labour market in Austria



Source: Eurostat

Another indicator of openness is the degree to which citizenship is granted. The following chart shows that in Austria there was a strong stop in the granting of citizenship in the period before the crisis (2003-2007). From 2008 to 2012 a fall of 32% is registered but in the last period it started to grow (from 50% in 2010 to 68% in 2012).

Crimes registered by the police show a fall from 104 to 96 from 2007 to 2012 and, in the last 3 years, an increase of 2,2%.

Figure 27. Acquisition of Citizenship in Austria

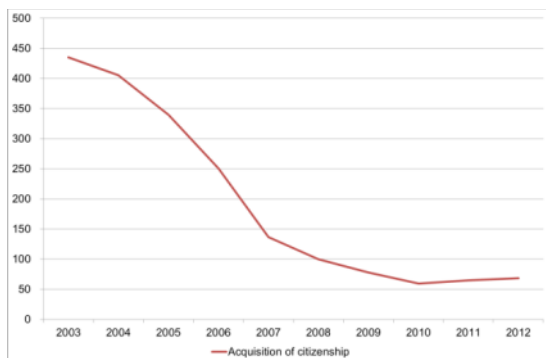
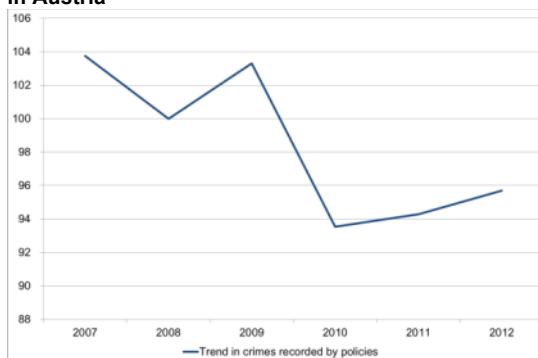


Figure 28. Trend in crimes recorded by the police in Austria



Source: Eurostat

The following graphs illustrate the situation of young people in Austria. Although the crisis has resulted in an increase in the risk of exclusion of young people from 16,6% in 2007 to 21% in 2012 (figure 29), as regards the school drop-out rate there has been a decrease from 10,7% in 2007 to 7,3% in 2012 (figure 30). In this respect, social inclusion policies seem to have been effective for the young.

Figure 29. Young people at risk of poverty or exclusion in Austria

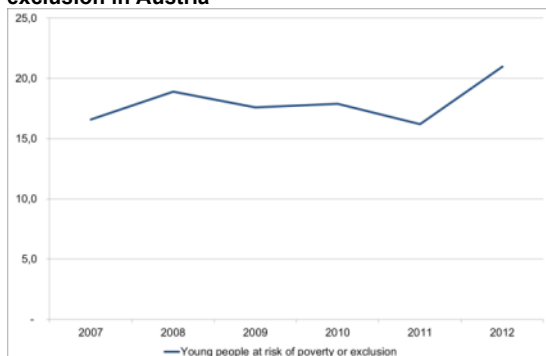
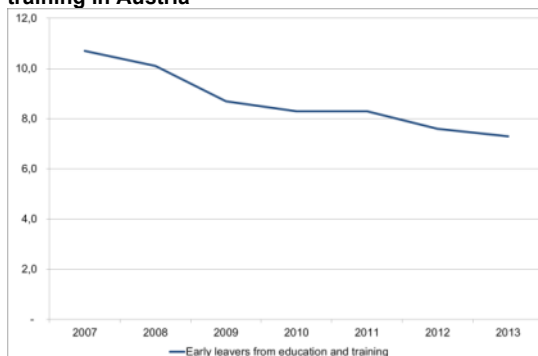


Figure 30. Early leavers from education and training in Austria



Source: Eurostat

To complete the picture, the table below shows 4 trust indicators, collected for the year 2006. The first indicator shows the importance of family solidarity: in Austria 91,7% of the population has a strong network of family relationships. The second indicator shows trust in other people and is measurable through participation in voluntary activities: there is a slight difference between adults and young people but it is possible to say that Austrian society trusts the others. The last trust indicator is the participation in activities of charitable organizations (6,6%).

Table 3. Other trust indicators in Austria

Description	Age	2006
Ability to ask any relative, friend or neighbor for help		91,7
Participation in informal voluntary activities	Adult	30,9
Participation in informal voluntary activities	Young	29,3
Participation in activities of charitable organisations		6,6

Source: Eurostat

Culture and Creativity

The following charts show the trend in GDP in Austria, directly related with the CCSs. In the last 10 years GDP in the cultural and creative sector registered a rise of 30% with an average growth rate of 3% per year. Within the national trend, the contribution of culture and creativity is equivalent to approximately 1,3% of the total Gross Domestic Product. After 2007 the indicator shows a growth of 0,8% in 2 years and then a stabilization between 1,4% and 1,37%.

Figure 31. Trend of GDP in CCSs in Austria

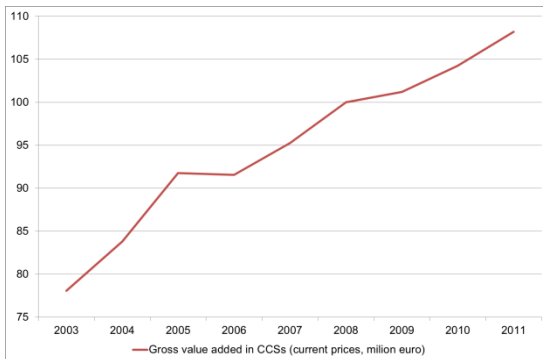
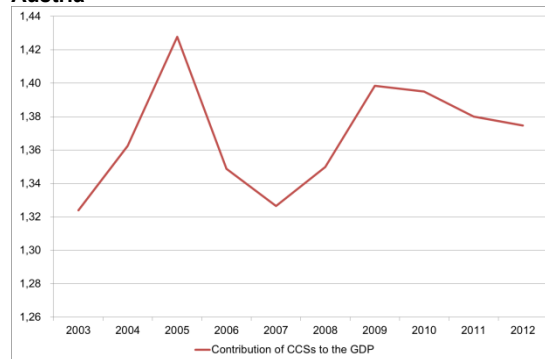


Figure 32. Contribution of CCSs to the GDP in Austria



Source: Eurostat

The role of public policy in cultural and creative industries is always important and the following charts show the public engagement in the cultural sector: although the trend in public expenditure seems to grow in the past 10 years, the percentage of public expenditure on general expenditure remains at the same level and starts to slow down only after 2007. In Austria 3% of general public expenditure is dedicated to culture.

Figure 33. Trend in public expenditure in Culture in Austria

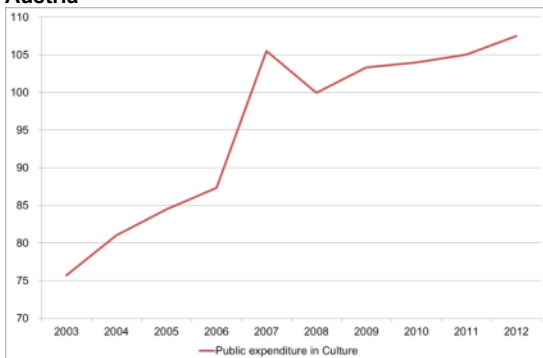
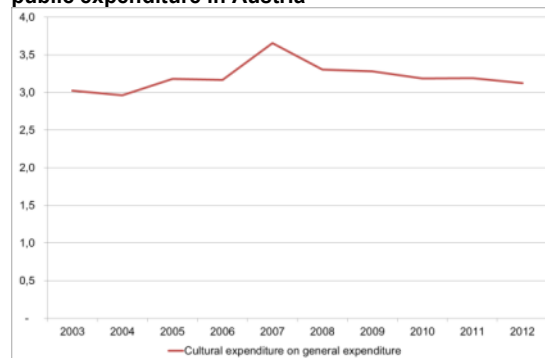


Figure 34. Public cultural expenditure on total public expenditure in Austria



Source: Eurostat

Demand and Supply of Culture and Creativity⁴

Austria counts 9 UNESCO sites and 493 museums (5,2 museums per 100.000 inhabitants) while 39,2% of the population visits cultural sites (20,6% more than 4 times per year), 41,5% goes to the cinema (23,4% more than 4 times) and 54% of population attends the performing arts (36,6% more than 4 times per year).

⁴ With the aim of presenting an overview of cultural supply and enabling for a comparison between the 28 Member States, tables with the number of UNESCO cultural sites and museums for supply, and cultural behaviour of citizens in participation in cultural life have been prepared for each country.

Table 4. Number of UNESCO cultural sites and museums in Austria

Description	Year	Number
UNESCO cultural sites	2013	9
Museums	2008	493

Source: Eurostat, EGMUS

Table 5. Cultural behaviours in Austria

Description/number of times	None	1-3	4-6	7-12	more than 12
Times going to live performances	46,0	17,5	18,8	10,9	6,9
Times going to the cinema	58,5	18,1	12,9	6,5	4,0
Visits to cultural sites	60,8	18,6	8,5	6,1	6,0

Source: Eurostat

Education

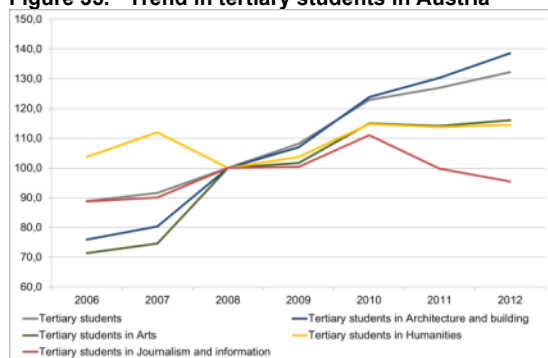
The following graphs show the trend for the tertiary students in general and in the creative sector.

While the number of students enrolled in tertiary schools is growing, the number of those enrolled in Journalism and information has decreased by 4,5% in the last 3 years; and, in general, the number of students in culture-related studies is growing less than the general figures.

In 2012 students in Architecture and building were 38% more than those in 2008; students in the Humanities registered an increase of +14% and in in the Arts +16,1%.

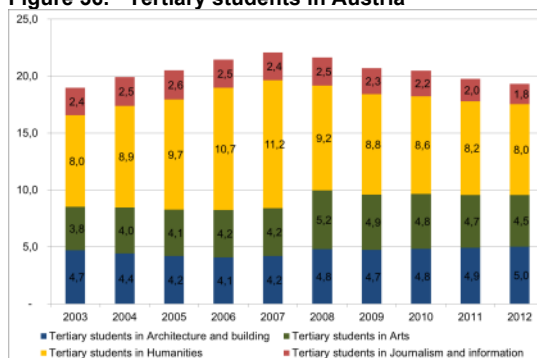
As regards students in culture-related matters numbers grow until 2007 in respect to the total tertiary students' population whereas in 2012 they are less than the 20% of the overall student population.

Figure 35. Trend in tertiary students in Austria



Source: Eurostat

Figure 36. Tertiary students in Austria



Employment and Young employment in CCSs

Data for the cultural and creative sector are available from 2008: the following figures show that employment in the sector is growing less than general employment in Austria.

The worst performance is registered for the young with a loss of 28% of employed from 2008 to 2013 while the total number of employees of the same age loses less than 4% in the same period.

The cultural and creative sector suffers also as regards adult employment: whereas general employment rose of 2%, the CCSs lost approximately 2% of jobs.

The trend is confirmed by Figure 38 which clearly shows that in 2008 the young employed in CCSs were more than 3% of the total employed whereas in 2013 they were less than 2,5% with the total employment in the sector stable in the same period.

Figure 37. Employment and young employment in Austria (Total and in CCSs)

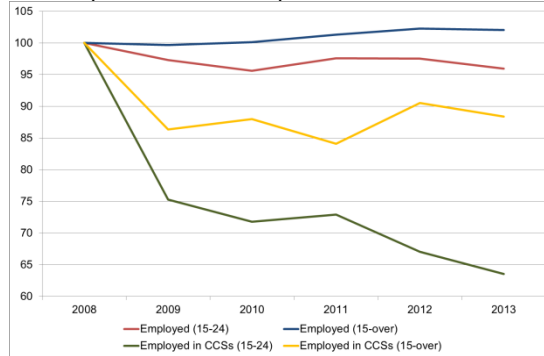
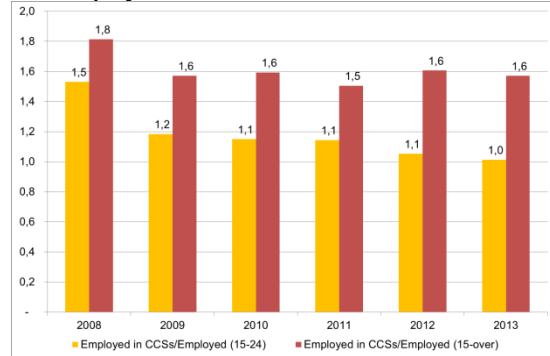


Figure 38. Composition of Employed in CCSs on total employed in Austria



Source: Eurostat

The data collected for each sector of the CCSs, presented in the following figures makes it possible to argue that the trend in cultural and creative employment fluctuates. The worst performance is registered by the employed in “Libraries, archives and museums” (NACE 91) that lost, in the last year, 24% of the employed. This sector represents 12,2% of the total employed (2013) in CCSs and from 2008, after a first period of growth, it had a strong fall in 2013.

“Publishing activities” (NACE 58) lost 50% of employed in the first part of the period and after 2012 rose again to 88%, losing an overall 12% in the 6 years. Similar trends are registered by the employed in “Motion pictures” (NACE 59) and “Program and broadcasting” (NACE 60). The first, after a first period of crisis show a positive trend last year; the second stands at 81% in 2013, losing 19% of employed in 6 years.

The “Creative arts and entertainment sector” (NACE 90) is the one that registered a stable trend in the period and the most relevant percentage of employed.

Figure 39. Trend in Employment in CCSs for sector of activity in Austria

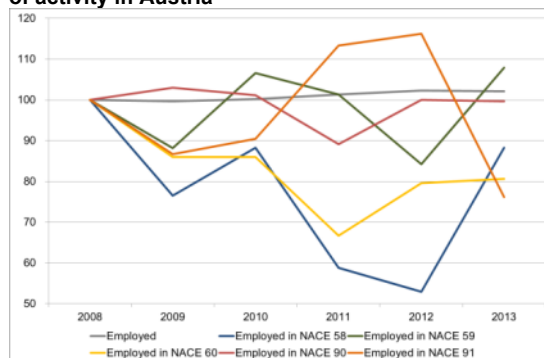
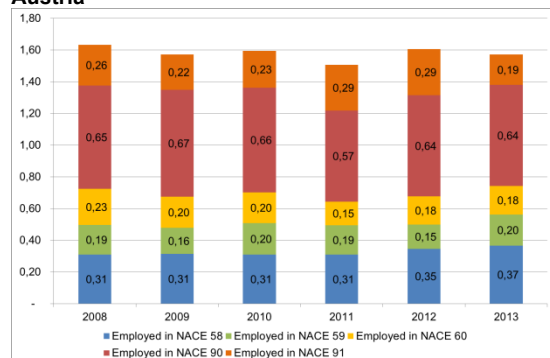


Figure 40. Composition of employed in CCSs in Austria



Source: Eurostat

The following charts focus on young employment. The only sector that seems to be resilient is the “Motion pictures, videos and television” (NACE 59) that represent 25,9% of the employed in culture, with a growth of 8% for the period. For the other sectors the worst performance is registered by “Programming and broadcasting” (NACE 60) that represent

5,6% of total cultural and creative employment. The young employed in “Publishing activities” (NACE 58) are 27% of the total employed in culture and registered a growing trend in the last year after a 5-year decrease period. The “Arts” sector (NACE 90 and 91) which represents over 50% of the general youth employment in the creative sectors, registered a loss respectively of 60% and 53%.

Figure 41. Trend in Employment in CCSs for sector of activity for young employed in Austria

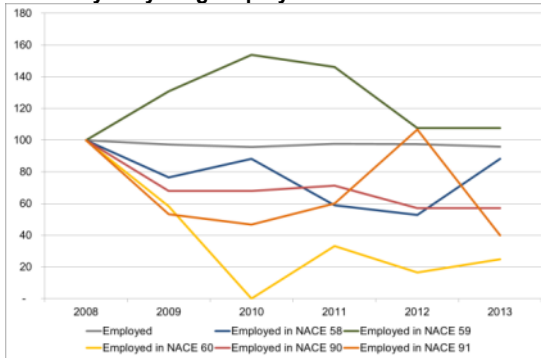
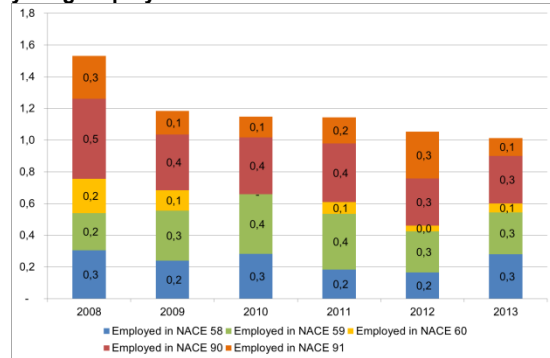


Figure 42. Composition of employed in CCSs for young employed in Austria

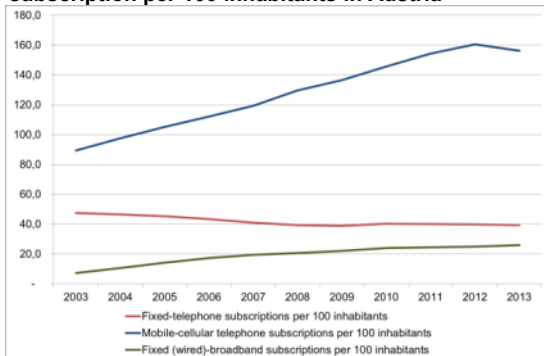


Source: Eurostat

ICTs

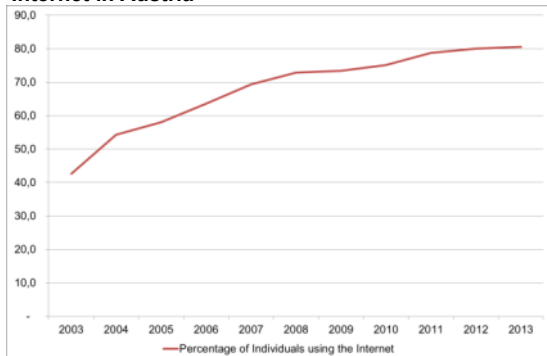
The Information and Communication Technology sector is described through the charts below. The first shows that mobile communication is the most dynamic sector with a strong registered growth rate in the last 10 years. Instead, every 26 of 100 inhabitants have a broadband subscription and about 40 have a fixed telephone line (from about 48 in 2003). The percentage of people that use the Internet registered a strong growth in the period reaching 80% of the population in 2013 from 42,7% in 2003.

Figure 43. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Austria



Source: Eurostat

Figure 44. Percentage of Individuals using the Internet in Austria



The following charts show employment trends in the ICT sectors. The only sector that faced the crisis positively is the one in “Computer programming” (NACE 62) that rose 40% in the last 6 years accounting for over 62% of the employed in the ICT sector (from 51,6% in 2008).

The other sectors suffered from the crisis and, in particular, “Information services and activities” (NACE 63) that represents 13,1% of the total employed in the sector and “Telecommunications” (NACE 62) that, after a first period of slight growth, in the last year has shown a slight decrease.

Figure 45. Trend in ICT Employment in Austria

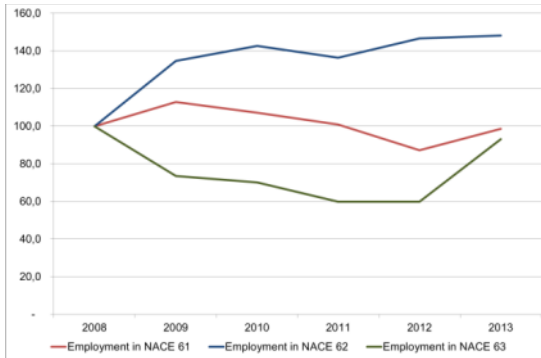
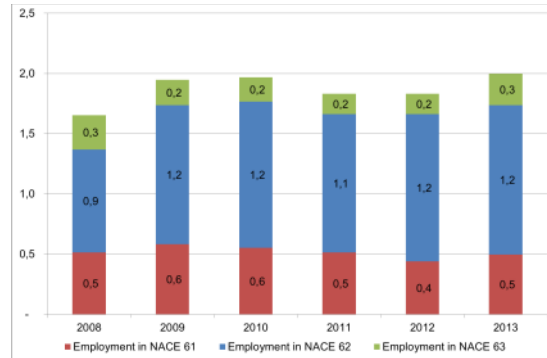


Figure 46. Composition of ICT Employment in Austria



Source: Eurostat

BELGIUM

Belgium is one of the founding Member States of the European Union (1952). It has a population of 11.1 million inhabitants. Young people are 1.3 million. In the last 10 years Belgium registered a 7,5% growth in population and a 7,2% growth in young population. The growing rate of students in tertiary education has made labour force of young people decrease in the last 5 years. Labour force has registered an increase of 3,5% percentage points from 2008 and of 11,6% from 2003.

Figure 47. Trend in population in Belgium

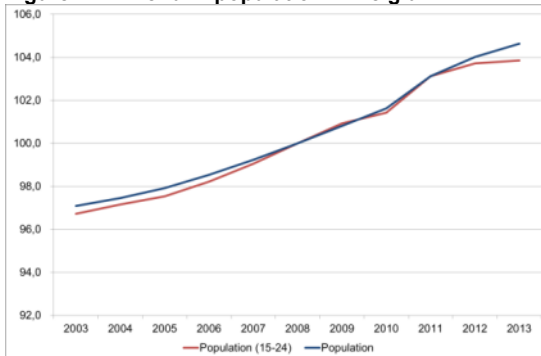
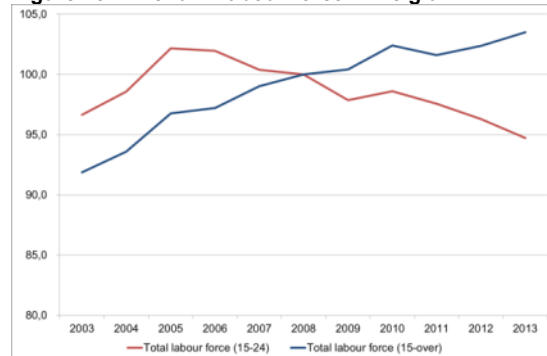


Figure 48. Trend in labour force in Belgium



Source: Eurostat

After a halt in 2008, GDP has started to grow again and has risen 10% in the last 5 years. The difference between the trend in GDP and the trend in GDP *per capita* shows a trend of concentration of resources. This trend is similar in many countries in Europe and elsewhere.

Belgium has also registered a strong increase of government expenditure: 20% in the last 5 years and over 40% in the 10 years (figure 50).

Figure 49. Trend in GDP in Belgium

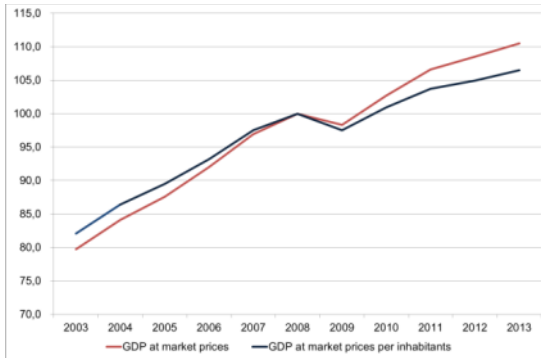
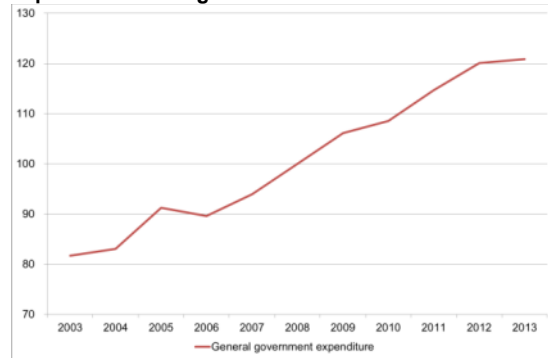


Figure 50. Trend in general government expenditure in Belgium



Source: Eurostat

The graphs below show the trends in employment and self-employment. General figures show a slight increase of employment and self-employment in the 10 years under review. In particular, the number of self-employed rose over 11% from 2008 and young self-employed over 30%. The labour market is becoming more flexible and self-employment is the result of this specific trend.

In general, after compulsory schooling, young people in Belgium have either chosen to go on to tertiary education or to become self-employed.

Figure 51. Trend in employment in Belgium

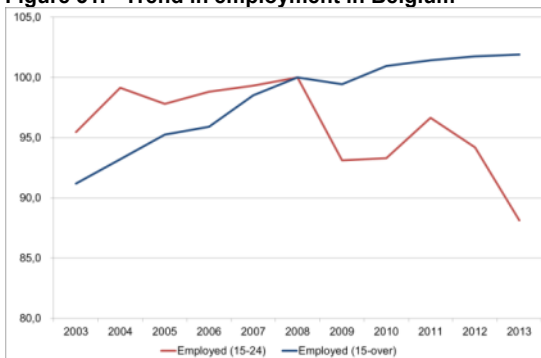
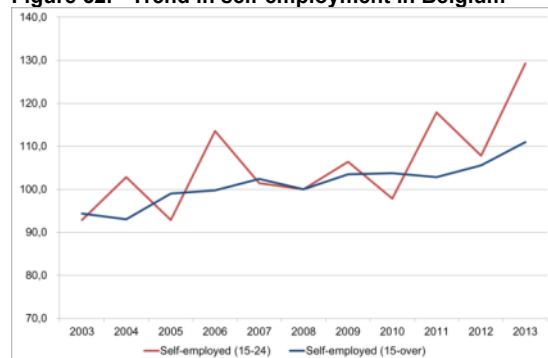


Figure 52. Trend in self-employment in Belgium



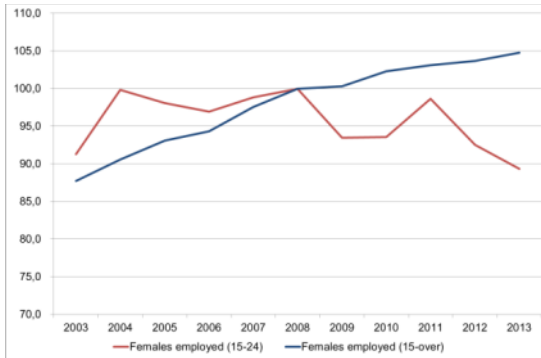
Source: Eurostat

Social environment

The situation of women shown in the charts below describes a dynamic trend. Generally the number of women employed has risen 17% in the last 10 years and represents 46% of the total employed.

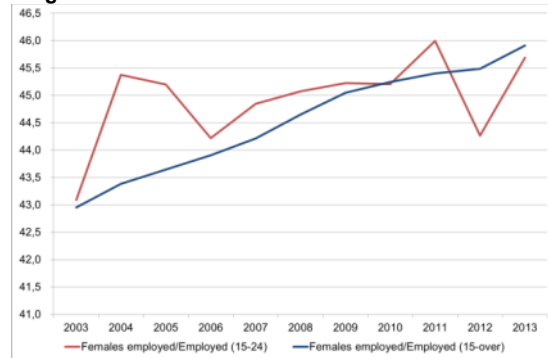
The figures show that the trend is dynamic for young women who perform better than the rest.

Figure 53. Trend in Female employment in Belgium



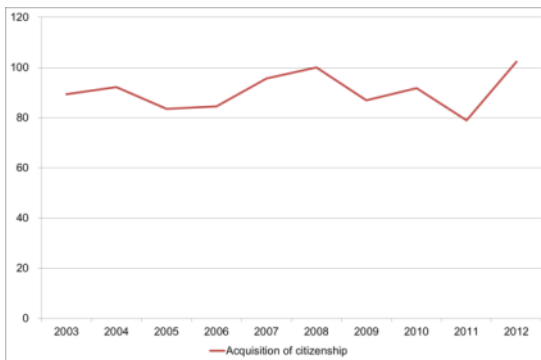
Source: Eurostat

Figure 54. Female participation to labour market in Belgium



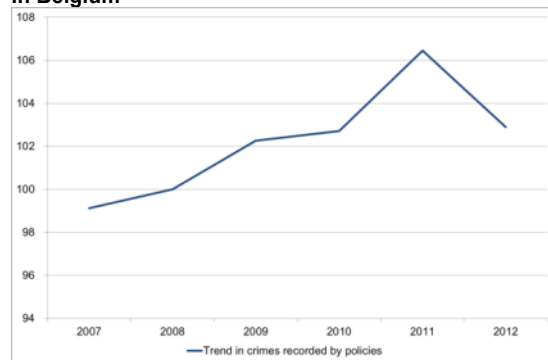
As regards the granting of citizenship, in 2008 following a change in policy the number decreased and only last year it started to grow back to the level of 2008 (figure 55). In the same period, crimes registered by the police continued to grow and stopped only in 2012 (figure 56).

Figure 55. Acquisition of Citizenship in Belgium



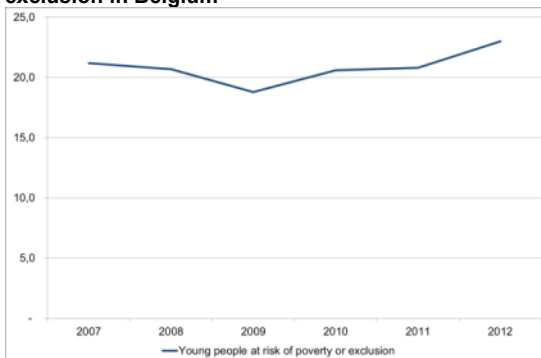
Source: Eurostat

Figure 56. Trend in crimes recorded by the police in Belgium



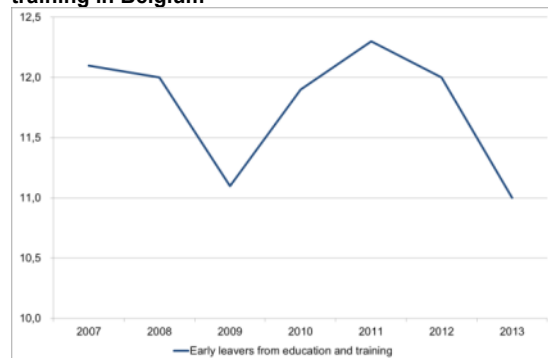
As regards young people at risk of exclusion, figure 57 shows that there is indeed an increase of the population in danger. As regards instead early school leavers figure 58 illustrates a trend by which this situation has become better in the last 3 years possibly due to the fact that young people have been pushed to continue their education.

Figure 57. Young people at risk of poverty or exclusion in Belgium



Source: Eurostat

Figure 58. Early leavers from education and training in Belgium



To complete the scenario the following table shows that 13% of the adult population practice active citizenship whereas less than 12% of the young do so and that the family networks are very strong.

Table 6. Other trust indicators in Belgium

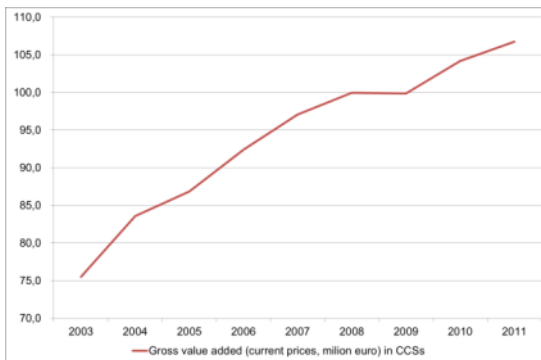
Description	Age	2006
Ability to ask any relative, friend or neighbor for help		93,4
Participation in informal voluntary activities	Adult	13,4
Participation in informal voluntary activities	Young	11,8
Participation in activities of charitable organisations		7,1

Source: Eurostat

Culture and Creativity

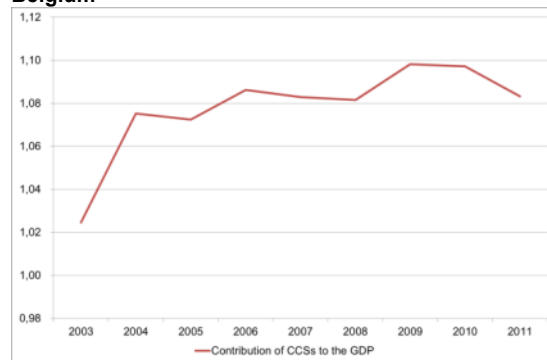
In the last 10 years GDP in the creative sector, as shown in the chart below, shows a very dynamic trend with an increase of 30%. In 2011, the contribution of CCSs to the Belgian GDP was approximately 1,8%.

Figure 59. Trend of GDP in CCSs in Belgium



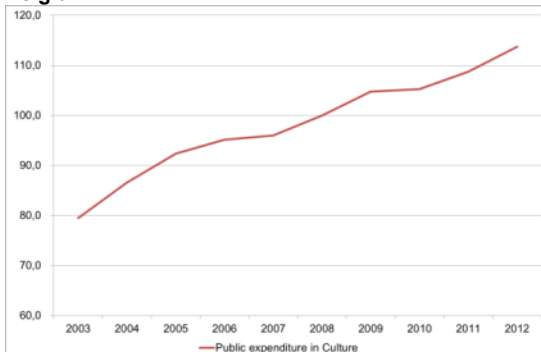
Source: Eurostat

Figure 60. Contribution of CCSs to the GDP in Belgium



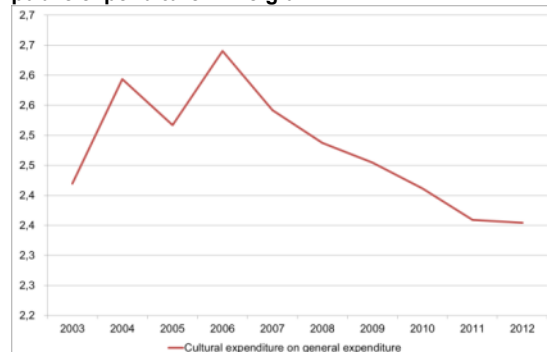
As to the public sector, it has progressively decreased its commitment. While public expenditure in culture grew, the percentage of cultural expenditure in the general expenditure decreased very strongly from 2006 and was at 2,4% approximately in 2012.

Figure 61. Trend in public expenditure in Culture in Belgium



Source: Eurostat

Figure 62. Public cultural expenditure on total public expenditure in Belgium



Demand and Supply of Culture and Creativity

To contextualize the CCSs data, cultural heritage is one of the parameters to measure cultural supply. The table below shows that Belgium counts 11 UNESCO cultural sites and 162 museums (1,5 museums per 100.000 inhabitants).

Table 7. Number of UNESCO cultural sites and museums in Belgium

Description	Year	Number
UNESCO cultural sites	2013	11
Museums	2004	162

Source: Eurostat, EGMUS

Participation in cultural activities is shown in the table below. 41,6% of Belgians visit cultural sites (16,1% more than 4 times); 47,4% goes to the cinema (23% more than 4 times) and 44,6% attend live performances (16,9% more than 4 times). The table shows also the number of times that people repeat the experience of participating in cultural activities and 11% of the population is a strong consumer: 11% attend cinema; 6,9% performances and 6,8% visits cultural sites.

Table 8. Cultural behaviours in Belgium

Description/times	none	1-3	4-6	7-12	more than 12
Times going to live performances	55,4	27,8	10,0	4,1	2,8
Times going to the cinema	52,6	24,4	12,0	5,7	5,3
Visits to cultural sites	58,4	25,6	9,3	4,3	2,5

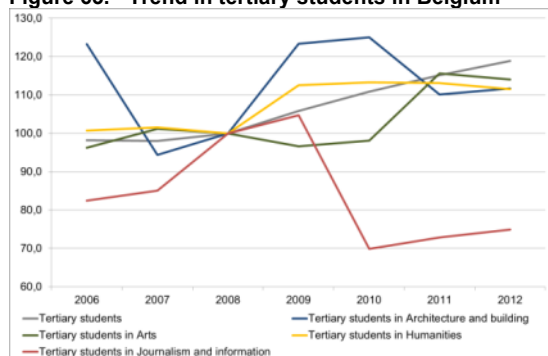
Source: Eurostat

Education

As stated before, the number of students in tertiary education has grown strongly in the last 6 years but as regards education in culture related matters figures show an opposite trend.

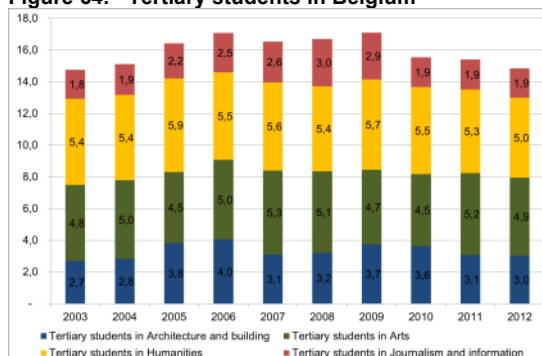
Indeed, only for studies in Architectural and building charts show a more dynamic trend but, at the end of the period, they still show lower numbers than those for general tertiary studies.

Figure 63. Trend in tertiary students in Belgium



Source: Eurostat

Figure 64. Tertiary students in Belgium



Employment and Young employment

The following charts show the trend in employment of young people and adults in the CCSs as compared with total employment. The figures show that employment in the CCSs reacts better to the crisis than the general trend in Belgium. 3,7% of the young are employed in the CCSs and 1,5% of the total employed work in the CCSs.

Figure 65. Employment and young employment in Belgium (Total and in CCSs)

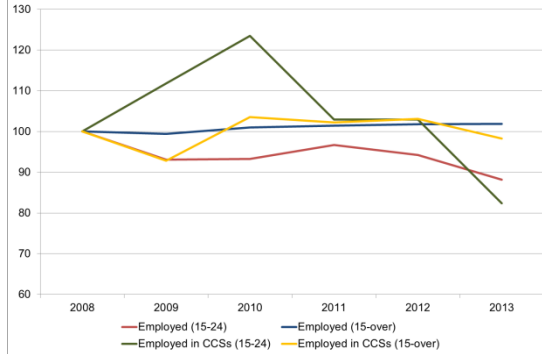
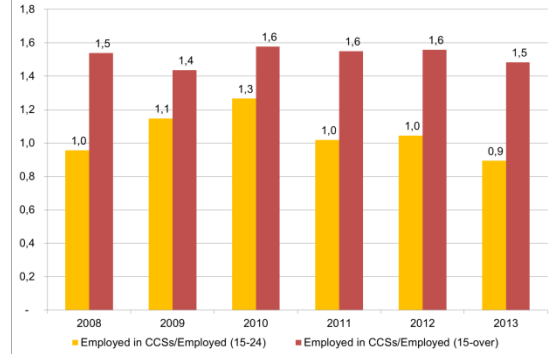


Figure 66. Composition of Employed in CCSs on total employed in Belgium



Source: Eurostat

Focusing on the CCSs, the only sector that registers a strong crisis is the “Publishing” sector (NACE 58) while all other sectors show a resilient trend especially for “Motion picture” (NACE 59): in 2013 they account for 17,3% of the total employed in the CCSs with a rise of +66% since 2008. In the last 6 years those employed in the "Creative arts and entertainment" sector (NACE 90) show a positive trend with a 14% increase, accounting for 31% of those employed in the CCSs.

The “Programming and broadcasting” sector (NACE 60) grew 29% in the past 6 years, albeit with a fluctuating trend and accounts for 13,1% of the total employed in the CCSs. As regards those employed in the “Libraries, archives and museums” sector (NACE 91), after a first period of increase, in the last year they have decreased bringing them to 19% of those employed in the CCSs.

Figure 67. Trend in Employment in CCSs for sector of activity in Belgium

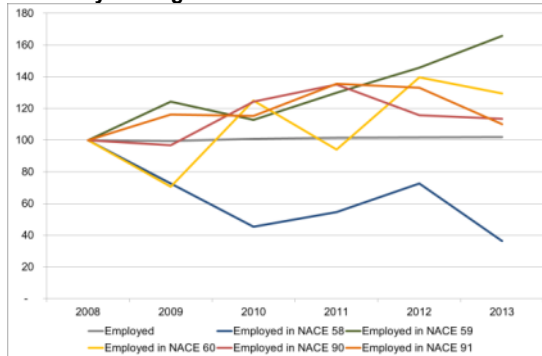
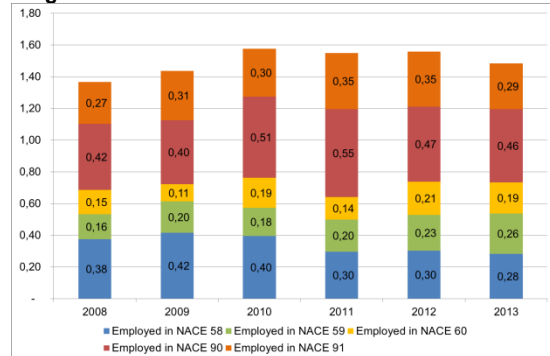


Figure 68. Composition of employed in CCSs in Belgium



Source: Eurostat

As for the young employed the trend is different. The following charts show that the two sectors that are resilient are the “Programming and broadcasting” sector (NACE 60) and the “Creative arts and entertainment” sector (NACE 90). For the first, data available through Eurostat shows a brake in time series trend in the first sector Eurostat data have a break and is impossible to show the correct trend. Data in 2010 are consequently estimated. The two dynamic sectors prove that more than 50% of young professionals working in the creative economy have a positive and resilient trend.

Figure 69. Trend in Employment in CCSs for sector of activity for young employed in Belgium*

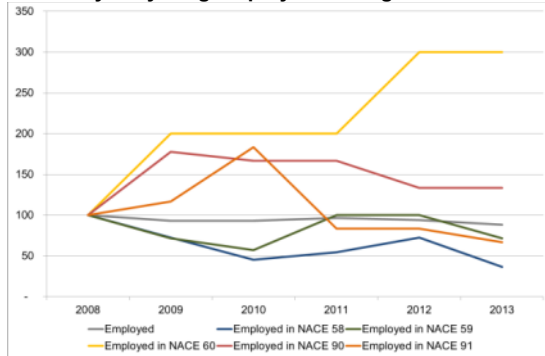
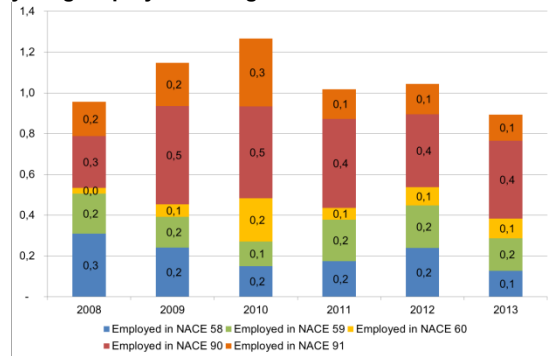


Figure 70. Composition of employed in CCSs for young employed in Belgium*



Source: Eurostat

*(NACE 60 has a break in time series from 2010)

ICT

The ICT sector in Belgium is growing especially due to mobile telephones while the fixed line telephone presence is slowly going down. A strong increase is registered with the broadband and more than 80% of the population has access to the Internet.

Figure 71. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Belgium

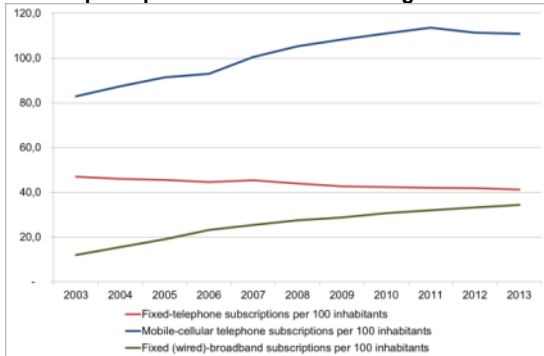
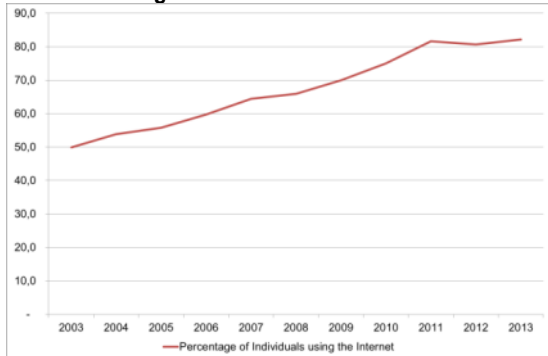


Figure 72. Percentage of Individuals using the Internet in Belgium



Source: Eurostat

Except for the “Telecommunications” sector (NACE 61) where in the last 5 years employment has decreased approximately 20%, the “Computer and programming” (NACE 62) and the “Information services” (NACE 63) sectors show a positive trend, more than the general trend in employment. The two sectors represent more than 73% of employment in the ICTs.

Figure 73. Trend in ICT Employment in Belgium

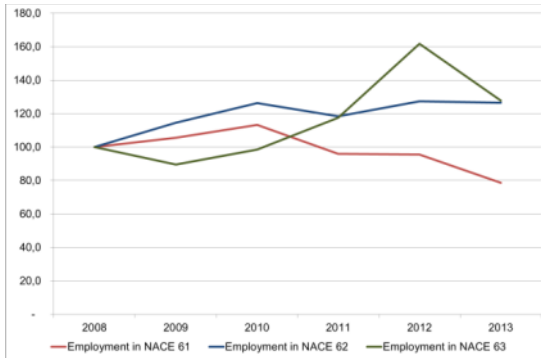
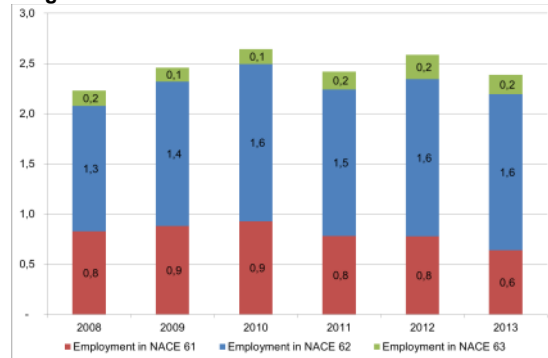


Figure 74. Composition of ICT Employment in Belgium



Source: Eurostat

BULGARIA

Bulgaria has 7 million inhabitants of which approximately 10,8% are young people. The population, as shown in the charts below, has strongly diminished in the last 10 years especially as regards the young. Migration is one of the elements that explain this trend which is stronger for the young. As a result of this process, labour force is decreasing from 2008 due to the crisis and the trend in population.

Figure 75. Trend in population in Bulgaria

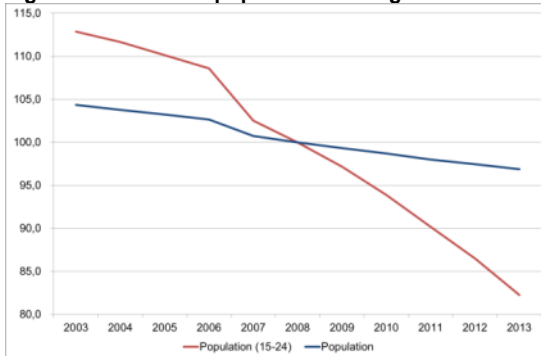
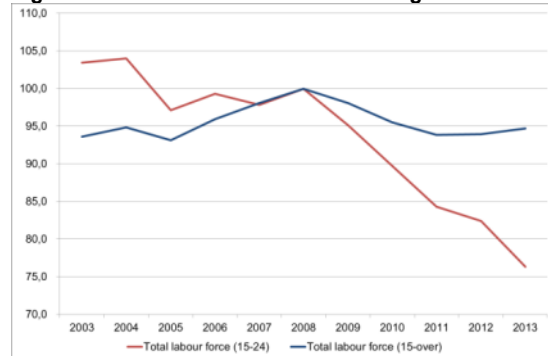


Figure 76. Trend in labour force in Bulgaria



Source: Eurostat

The graphs below show that in the last 10 years the GDP registered a strong growth, more than 7% per year in average (+70%). The general economy seems dynamic also because, as of 2009, the government stopped increasing public expenditure and only in 2013 general expenditure has been stronger than in 2009.

This trend has diminished the differences in income among the population. The gap between GDP and GDP *per capita* point out that the second indicator has increased more than the first.

Figure 77. Trend in GDP in Bulgaria

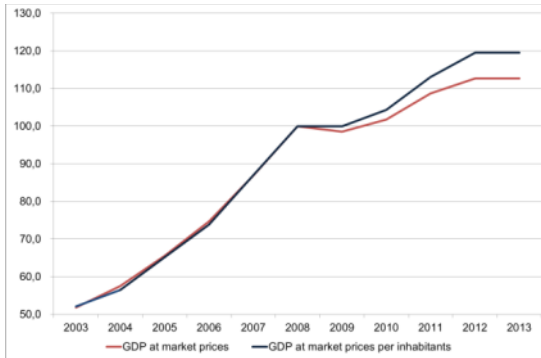
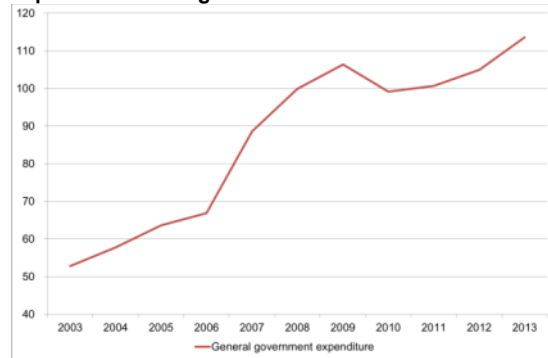


Figure 78. Trend in general government expenditure in Bulgaria



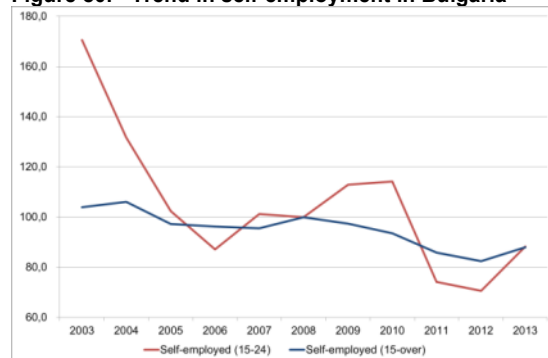
Source: Eurostat

Both the employed and self-employed are paying for the crisis. In fact, after 2008, the growing trend has strongly decreased especially for the young employed and self-employed: in 5 years, as the graphs below show, the employment rate has gone down 5% (37,4% for young people).

Figure 79. Trend in employment in Bulgaria*



Figure 80. Trend in self-employment in Bulgaria



Source: Eurostat

*break in time series from 2010

Social environment

The creative sector flourishes in countries where society is inclusive, tolerant and there is a high rate of use of technologies. One of the indicators of such inclusiveness is female participation in the labour market. The following charts show that women employed register a similar trend of that of general employment but the final result shows an overall better performance of women: indeed, they represent over 47% of the total employed but for the young women the figure is strongly worse.

Figure 81. Trend in Female employment in Bulgaria

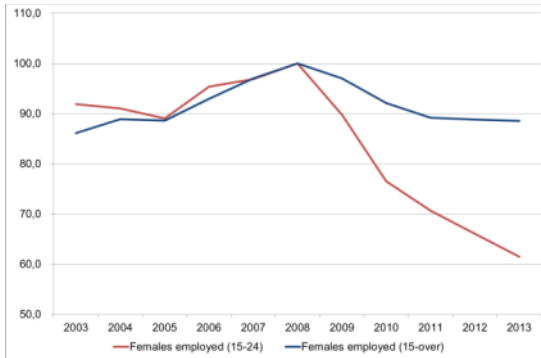
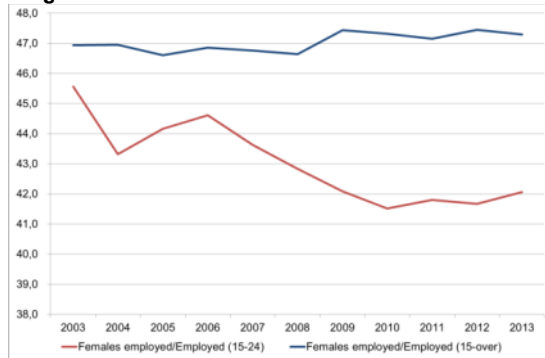


Figure 82. Female participation to labour market in Bulgaria



Source: Eurostat

The following charts show the permeability of society and social disease. In the first chart a break in time series does not display a continuous trend but if data before and after 2008 is taken into consideration, there is indeed a growth in the acquisition of citizenship.

Trend in recorded crime shows a strong rise of crimes from 2008 to 2010 and an opposite trend from 2010. In many cases this cannot have the meaning of a decrease in crime but a rather in trust.

Figure 83. Acquisition of Citizenship in Bulgaria*

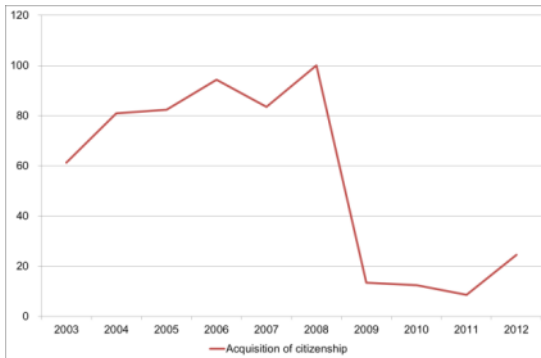
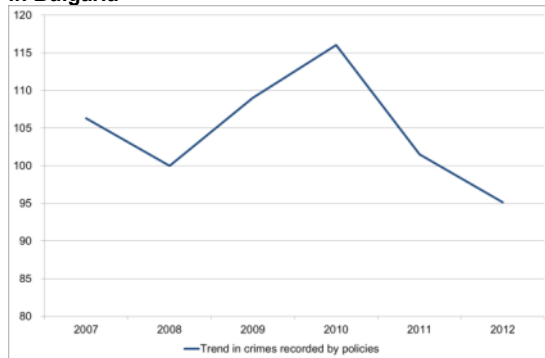


Figure 84. Trend in crimes recorded by the police in Bulgaria



Source: Eurostat

(*break in time series from 2008)

The general situation of young people is not a positive one. About half of the young population is at risk of poverty and since 2008 these numbers are increasing.

On the other hand the number of young people that drop out of school is going down.

Figure 85. Young people at risk of poverty or exclusion in Bulgaria

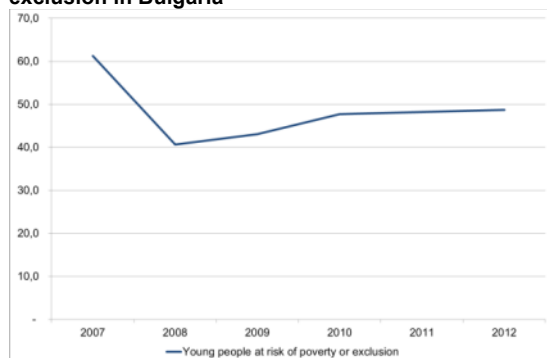
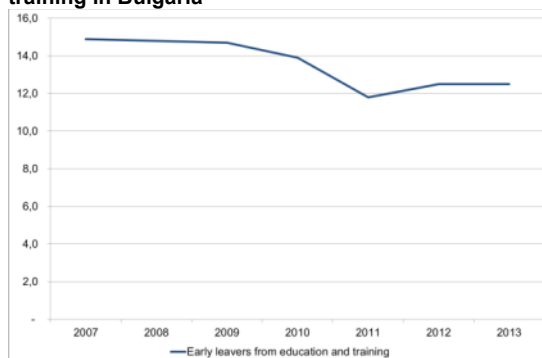


Figure 86. Early leavers from education and training in Bulgaria



Source: Eurostat

In Bulgaria trust in family is lower than in other countries and, in general, the population does not seem to be very active. Only 3,2% of adults participate in voluntary activities and only 2,3% of young people. Only 1,2% of the population participates in the activities of charitable institutions. In general it is possible to say that many indicators show that there is a scarce trust between the population and in social life.

Table 9. Other trust indicators in Bulgaria

Description	Age	2006
Ability to ask any relative, friend or neighbor for help		84,9
Participation in informal voluntary activities	Adult	3,2
Participation in informal voluntary activities	Young	2,3
Participation in activities of charitable organisations		1,2

Source: Eurostat

Culture and Creativity

Before the crisis the trend in the creative sector was very strong registering a 64% growth rate. After 2008 GDP in this sector has fallen more than the general economy. In 2011 the CCSs contributed to 1,46% of GDP.

Figure 87. Trend of GDP in CCSs in Bulgaria

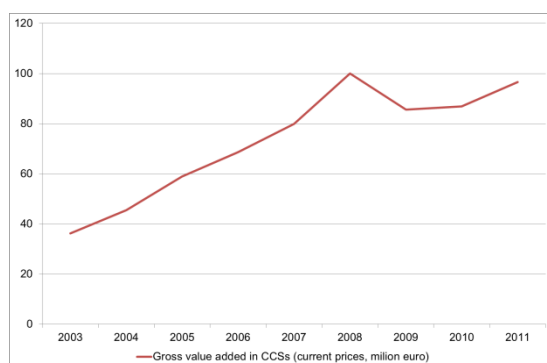
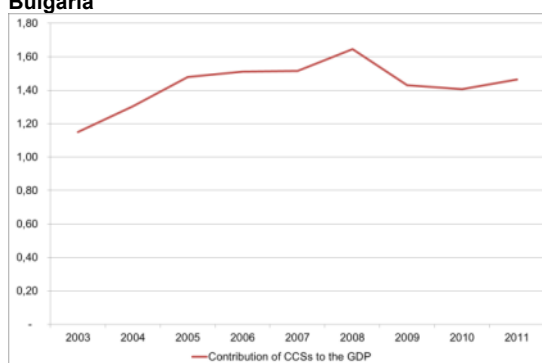


Figure 88. Contribution of CCSs to the GDP in Bulgaria



Source: Eurostat

2008 represents a milestone also for public expenditure on culture. Bulgaria cut the expenditure in culture in 2009 but after, it started to fund culture again. In general, public expenditure is 4% of the total expenditure.

Figure 89. Trend in public expenditure in Culture in Bulgaria

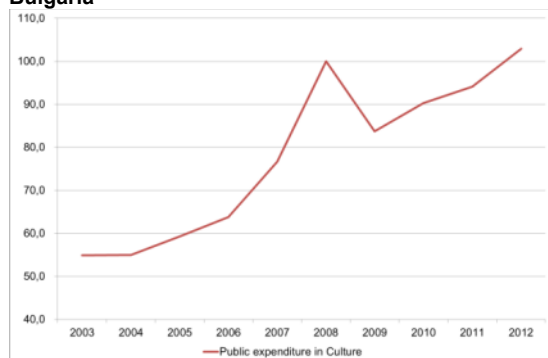
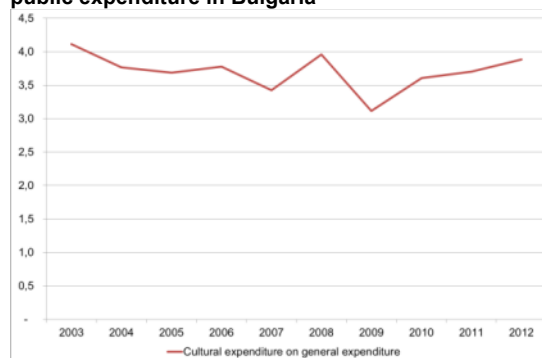


Figure 90. Public cultural expenditure on total public expenditure in Bulgaria



Source: Eurostat

Demand and Supply of Culture and Creativity

The indicator of the supply of cultural goods shows that in Bulgaria there are 7 UNESCO cultural sites and 188 museums (2,3 per 100.000 inhabitants).

Table 10. Number of UNESCO cultural sites and museums in Bulgaria

Description	Year	Number
UNESCO cultural sites	2013	7
Museums	2012	188

Source: Eurostat, EGMUS

The participation in cultural life is not very high. Only 12,2% of the population visits cultural sites, 13,4% goes to the cinema and 15% attend the performing arts. In general, people that consume cultural goods are not frequent attendants.

Table 11. Cultural behaviours in Bulgaria

Description/times	none	1-3	4-6	7-12	more than 12
Times going to live performances	85,0	10,7	2,7	0,8	0,8
Times going to the cinema	86,3	8,4	2,9	1,2	1,2
Visits to cultural sites	87,8	8,5	2,2	0,7	0,7

Source: Eurostat

Education

Tertiary students in cultural related studies are about 12% of the overall student population. Among them the most important number is represented by students in the Humanities. Students in Architecture and building and the Arts provide for a more dynamic trend than the rest of the student population. A weak trend is registered by students in the Humanities, Journalism and information.

Figure 91. Trend in tertiary students in Bulgaria

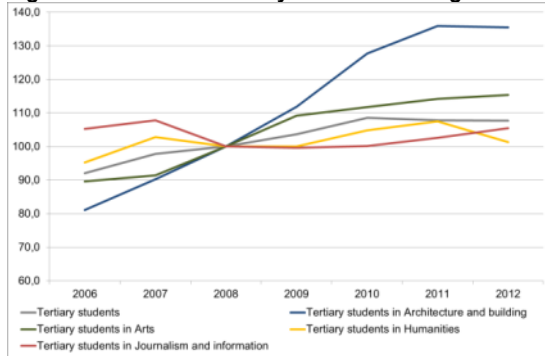
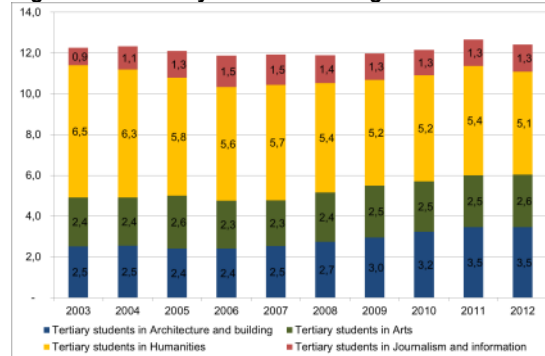


Figure 92. Tertiary students in Bulgaria



Source: Eurostat

Employment and Young employment

The following charts show employment in CCSs for adult and young people. Generally, those employed in the CCI's show a resilient dynamic because the trend in general employment is lower than the one in CCSs. Of the total employed, those employed in the CCSs are 1,3% of young people and 7,4% of adults.

Figure 93. Employment and young employment in Bulgaria (Total and in CCSs)

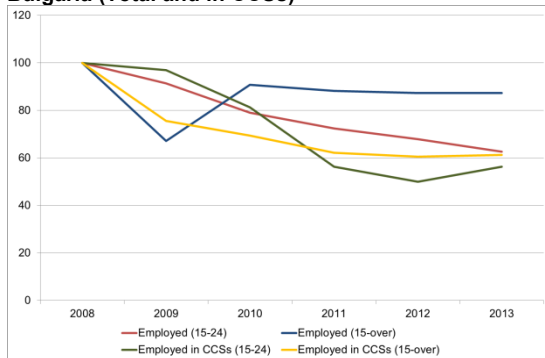
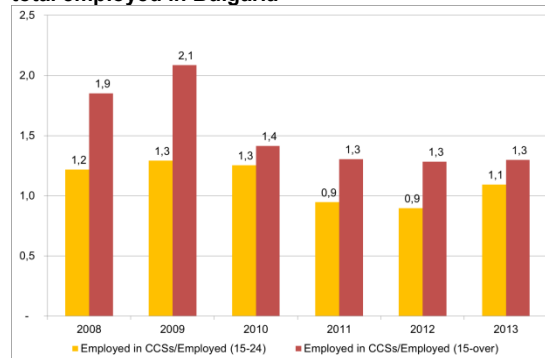


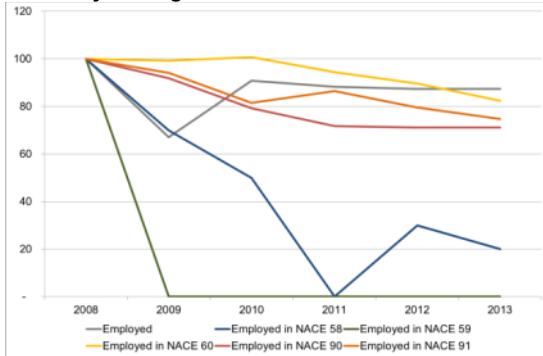
Figure 94. Composition of Employed in CCSs on total employed in Bulgaria



Source: Eurostat

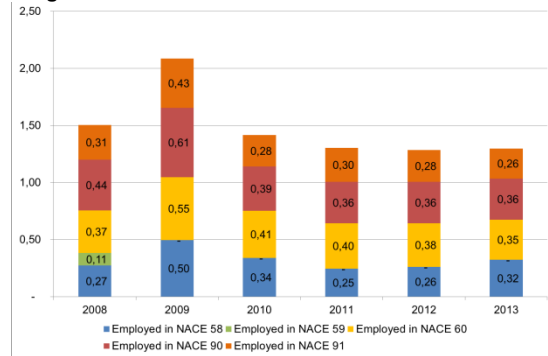
As shown in the charts below, data from Bulgaria are not complete. The most important sector are “Programming and broadcasting” (NACE 60) and “Creative Arts and entertainment” (NACE 90) that represent 54,8% of the total employed in the CCSs. Because of the lack of data for activities it is difficult to say if the creative employment is resilient or not.

Figure 95. Trend in Employment in CCSs for sector of activity in Bulgaria



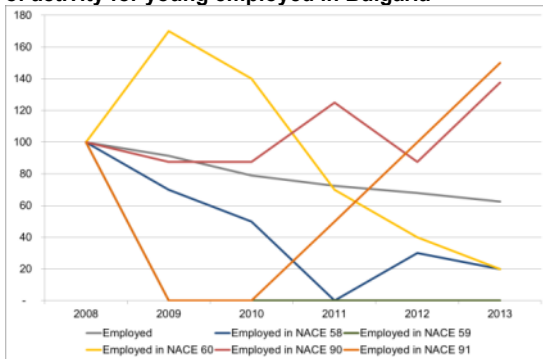
Source: Eurostat

Figure 96. Composition of employed in CCSs in Bulgaria



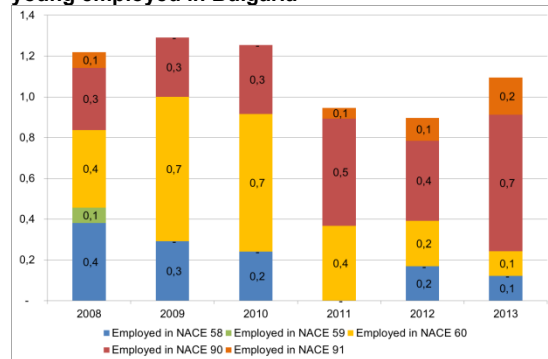
In the same way, is very difficult to find an answer to the question for young people. The following charts show the lack of data for the period under study.

Figure 97. Trend in Employment in CCSs for sector of activity for young employed in Bulgaria



Source: Eurostat

Figure 98. Composition of employed in CCSs for young employed in Bulgaria

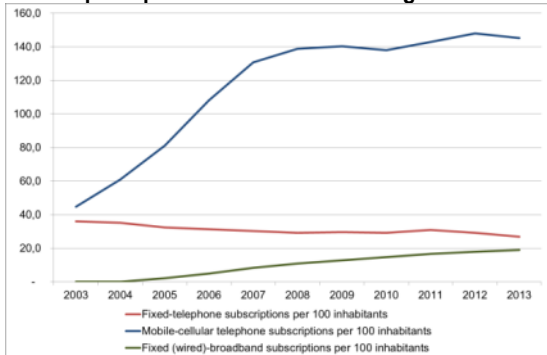


ICT

Like in many other countries, the most dynamic sector is the one of mobile telephone communications with a growth rate, in the last 10 years, of over 80%. A slow increase is registered for broadband available for 20% of the population.

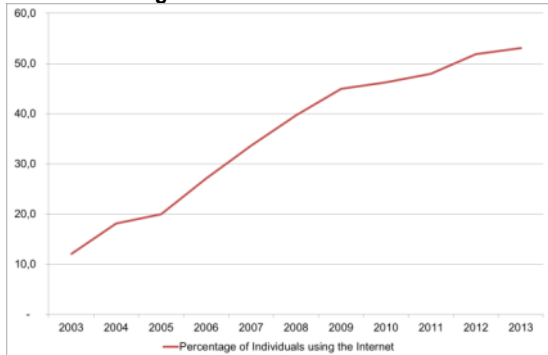
People with access to the Internet are 53%, considerably one of the lower in Europe.

Figure 99. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Bulgaria



Source: Eurostat

Figure 100. Percentage of Individuals using the Internet in Bulgaria



The following charts show the trend in ICT employment. Also in this case, the lack of data is one of the reasons why it is difficult to give an answer to the question of resilience. A general trend for “Communication and computer programming” is a slight indicator for a development of the sector and shows a better performance of the total employment.

Figure 101. Trend in ICT Employment in Bulgaria

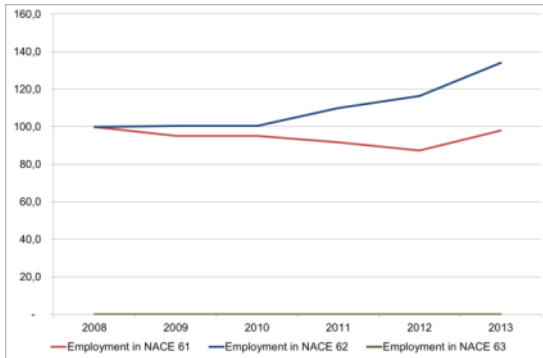
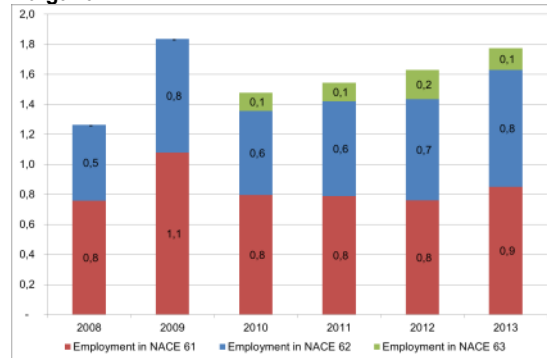


Figure 102. Composition of ICT Employment in Bulgaria



Source: Eurostat

CROATIA

Croatia has a population of 4,2 Million and is a member of the European Union from 2013. The following graphs show that whereas population has been quite stable in the last 10 years young population is decreasing and that, for this reason, labour force is diminishing.

Figure 103. Trend in population in Croatia

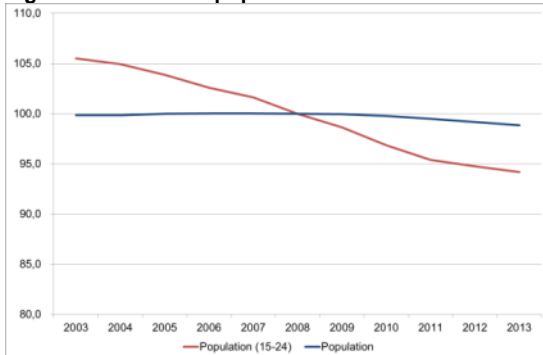
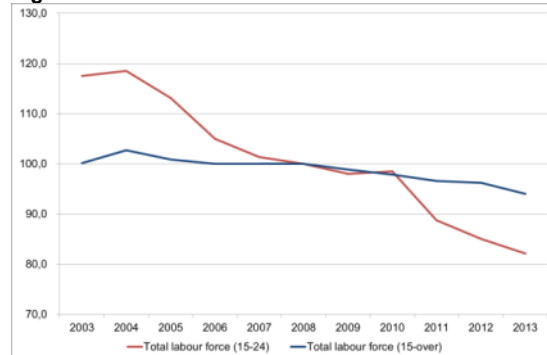


Figure 104. Trend in labour force in Croatia



Source: Eurostat

In the last 10 years Croatia registered a strong growth in GDP especially in the first part of the past decade (+30%). After 2008 GDP started a slight decline losing about 9% in the last 5 years. Especially from 2011 Croatia started to cut public budget with a 4% less in 2013 than in 2008.

Figure 105. Trend in GDP in Croatia

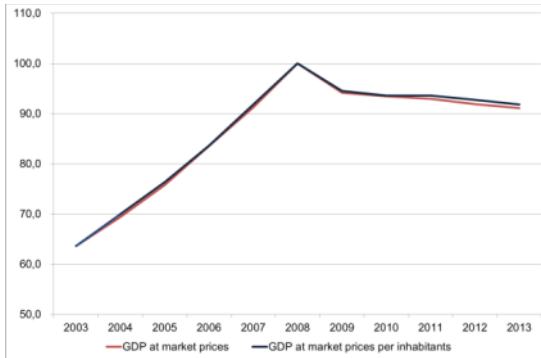
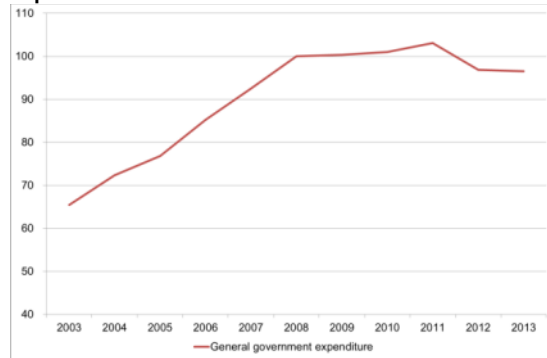


Figure 106. Trend in general government expenditure in Croatia



Source: Eurostat

The following charts show the trend of employment and self-employment in Croatia: the effect of the crisis is strong both for the employed and the self-employed. The employed have lost 15% in the last 5 years, while the young employed have lost 47%. The self-employed are 20% less than in 2008 and the decline has especially affected young people.

Figure 107. Trend in employment in Croatia

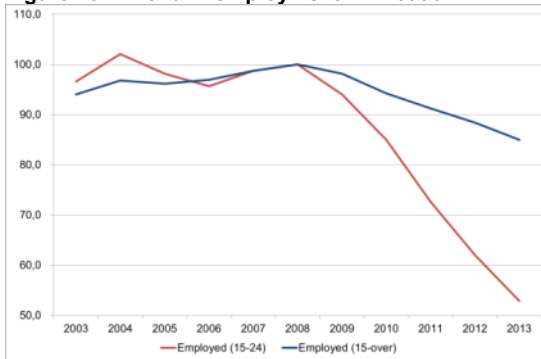
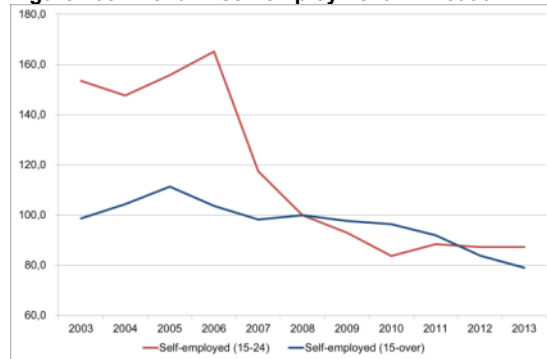


Figure 108. Trend in self-employment in Croatia



Source: Eurostat

Social environment

The general environment for the development of creativity is described in the following charts. Women employed face the crisis in a better way than the general trend: 11,4% have lost their jobs against 42,5% of young women. Women are 46,5% of the total work force (40% are young).

Figure 109. Trend in Female employment in Croatia

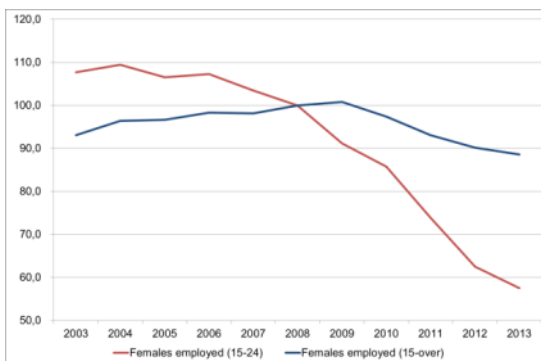
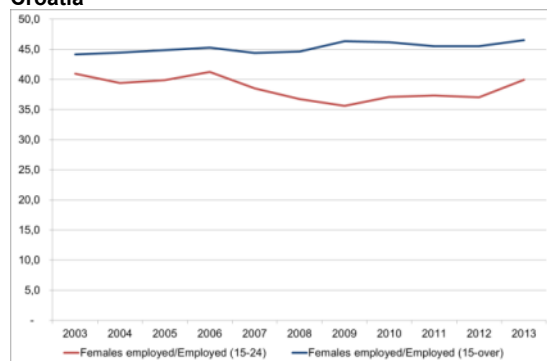


Figure 110. Female participation to labour market in Croatia



Source: Eurostat

As described by the following charts, in Croatia the crime rate has registered a slight decrease in the past 5 years, and in the same period the granting of citizenship has strongly gone down. While the first indicator shows a good performance in social environment, the second shows a trend of closing towards strangers.

Figure 111. Acquisition of Citizenship in Croatia

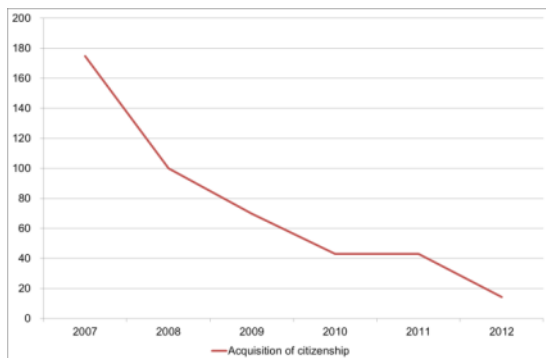
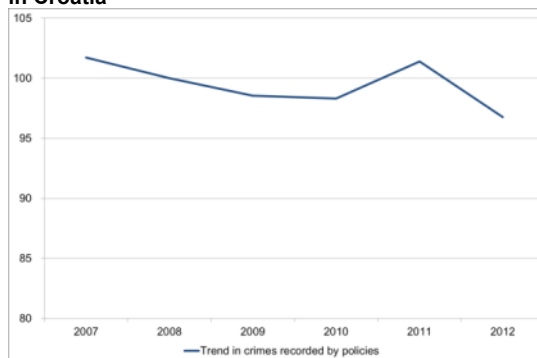


Figure 112. Trend in crimes recorded by the police in Croatia



Source: Eurostat

In the last 3 years Croatia has a little over 30% of young people at risk of poverty with, although, a high rate of young people included in the education system: the percentage of early school leavers has been only between 3,7 and 4,2% in the past 6 years.

Figure 113. Young people at risk of poverty or exclusion in Croatia

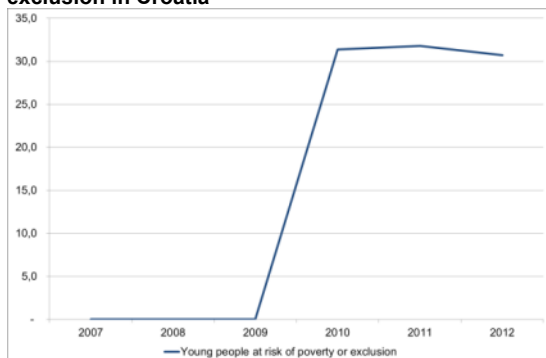
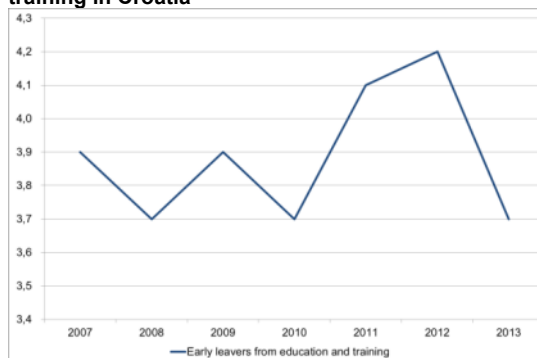


Figure 114. Early leavers from education and training in Croatia



Source: Eurostat

Culture and Creativity

Croatia has no data available to describe the creative sector. The only indicator available is the rate of public expenditure for culture on General public expenditure: 5,1% in 2012.

Demand and Supply of Culture and Creativity

While data on cultural participation are not available, Croatia has 6 UNESCO cultural sites and 221 museums (4,64 per 100.000 inhabitants).

Table 12. Number of UNESCO cultural sites and museums in Croatia

Description	Year	Number
UNESCO cultural sites	2013	6
Museums	2009	221

Source: Eurostat, EGMUS

The lack of information about cultural behaviour makes it pretty difficult to understand the general environment and to have a range of indicators that can show the general trend as well the policies for culture and creativity.

Education

The trend for tertiary students in culture related fields is shown by the charts below. While for Journalism and information there is a peak in 2006 that generates a strange graphic, generally students in arts and are growing faster than the general trends. The larger part of tertiary students in culture-related matters are in the Humanities (6,8%), while in 2012 students in Architecture and building account for 4.2%, in the Arts for 2.8% and in Journalism and information for 2.3%.

Figure 115. Trend in tertiary students in Croatia

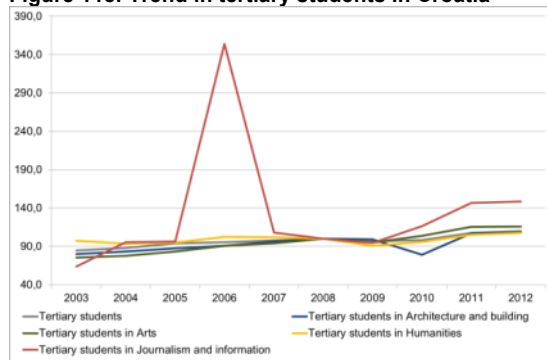
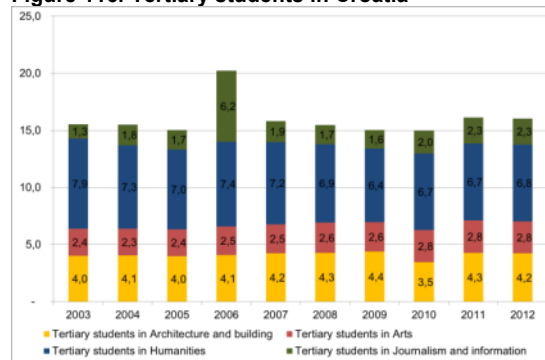


Figure 116. Tertiary students in Croatia



Source: Eurostat

Employment and Young employment

The following charts show the trend in employment and young employment in the field of culture and creativity. Those employed in the culture-related sector are 7,1% of the total employed in 2013 but the general trend is negative. Indeed, while since 2008 general employment has lost 15%, performance in employment in the CCSs is worse with a loss of 33,6% in the same period. Slightly better is the performance in employment of young people, (1,5% of total employed) with a better performance than the one registered in the general labour market for the same age.

Figure 117. Employment and young employment in Croatia (Total and in CCSs)

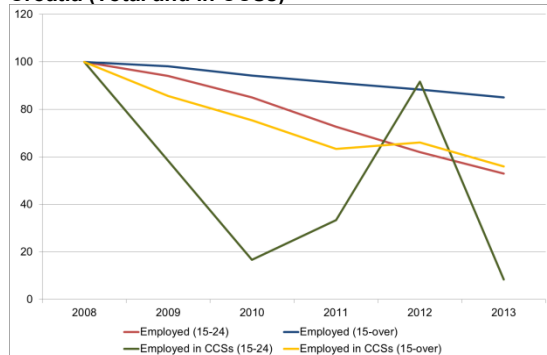
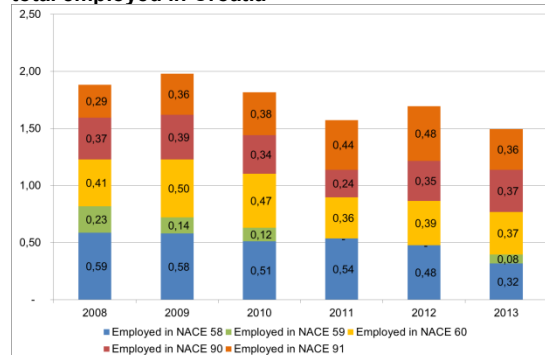


Figure 118. Composition of Employed in CCSs on total employed in Croatia



Source: Eurostat

The following charts show the trend for the different activities: the lack of data in some of the CCSs is one of the reasons why it is difficult to argue whether the labour market in CCSs is resilient or not. Consequently, only general trends can be described and this not in depth.

The only sector that seems to be resilient is the one related to “Libraries, archives and museums” (NACE 91): typically state-driven this can be the explanation of the reason why it is resilient. For the “Arts” (NACE 90) the performance after the crisis is negative and the trend is worse than the general trend. The same trend is registered by the “Programming and Broadcasting” sector (NACE 60). The lack of information is due to the fact that they represent a very small portion indeed of the labour market.

Figure 119. Trend in Employment in CCSs for sector of activity in Croatia

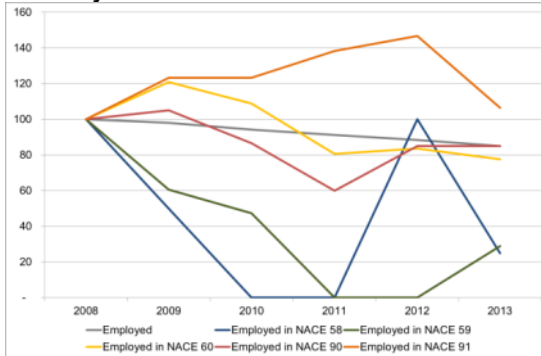
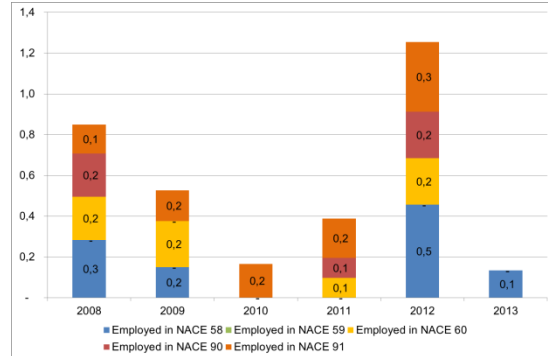


Figure 120. Composition of employed in CCSs in Croatia



Source: Eurostat

The analysis of young employment in the CCSs, per activity, is very difficult. For example in NACE 59 there are only 400 employed and, when numbers are so small, it is difficult to have statistics which, in many cases, are not economical. The following charts show the trend and the composition of the labour market for young people in the CCSs, although the significance of the data is very low.

Figure 121. Trend in Employment in CCSs for sector of activity for young employed in Belgium

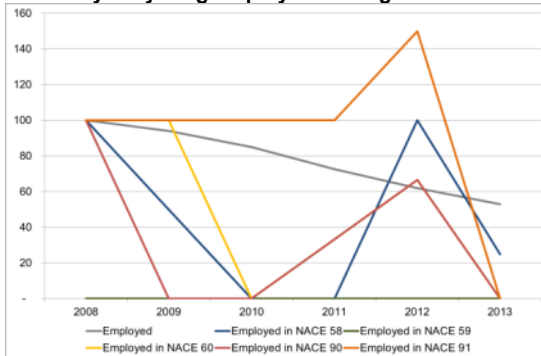
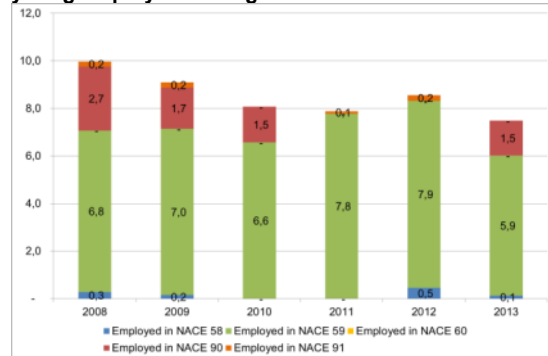


Figure 122. Composition of employed in CCSs for young employed in Belgium



Source: Eurostat

ICT

Like in many other countries the most dynamic sector for the ICT is the mobile communications sector. In Croatia there is a stable trend in fixed telephone (40% of inhabitants have a fixed telephone) and a growth of broadband that reaches 20% in 2013. In the same period the percentage of people that uses the internet is 66,7%, less than the majority of European countries.

Figure 123. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Croatia

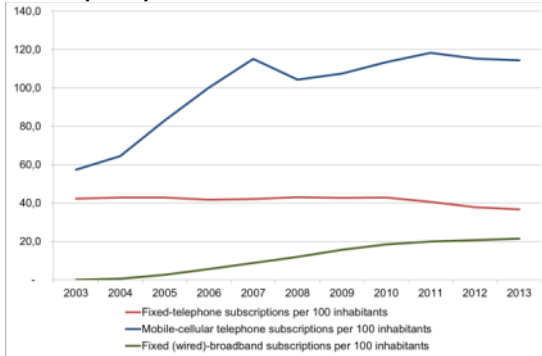
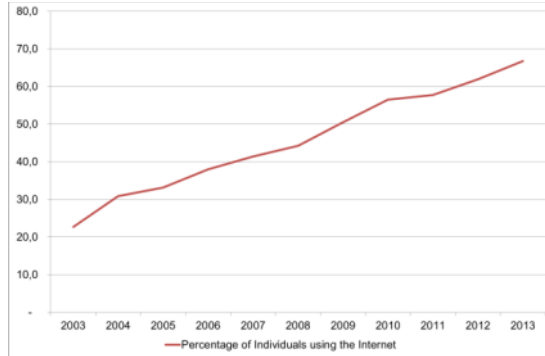


Figure 124. Percentage of Individuals using the Internet in Croatia



Source: Eurostat

The trend in employment in ICT is shown in the following charts. The best performance is registered by the “Information services” (NACE 63) that registered a growth of over 300% as of 2008. A very good performance is registered in “Computer programming” (NACE 62) that registered a growth of 240% in the last 5 years. On the contrary, the “Telecommunication” sector lost 30% of employed. The composition of employment in the 3 sectors shows a strong change in the market. While “Telecommunication” went from 61.4% to 30% of the total employed in the ICTs, the “Computer programming” sector shows the opposite trend.

Figure 125. Trend in ICT Employment in Croatia

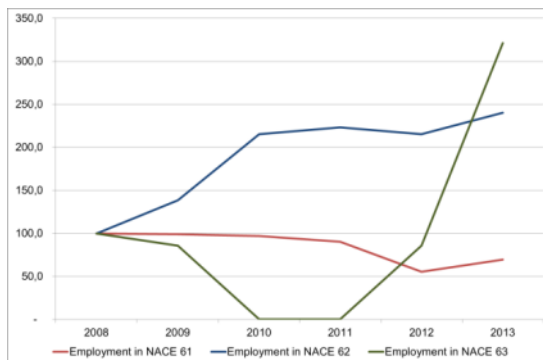
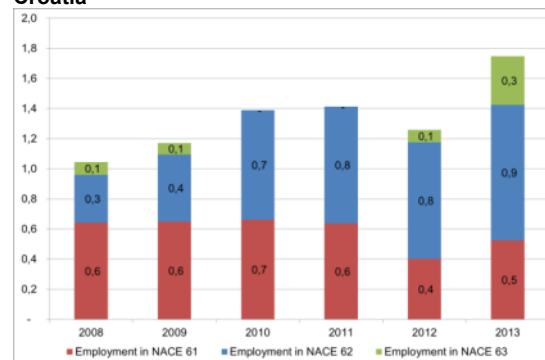


Figure 126. Composition of ICT Employment in Croatia



Source: Eurostat

CYPRUS

Cyprus is a small country with less than 1 million in population and has been a member of the EU since 2004. As shown in the following graphs, population has increased in the last 10 years with only young people decreasing in number, especially from 2011. Nevertheless, as of 2012 the trend is changing and this is even clearer when matched to the labour force.

Figure 127. Trend in population in Cyprus

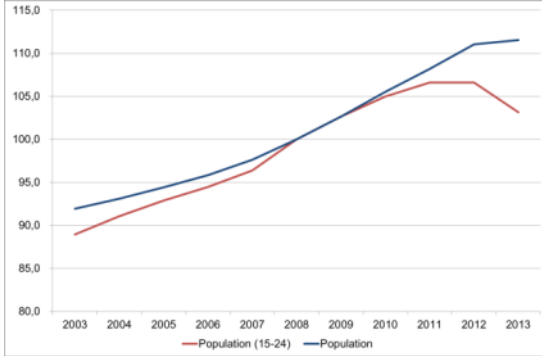
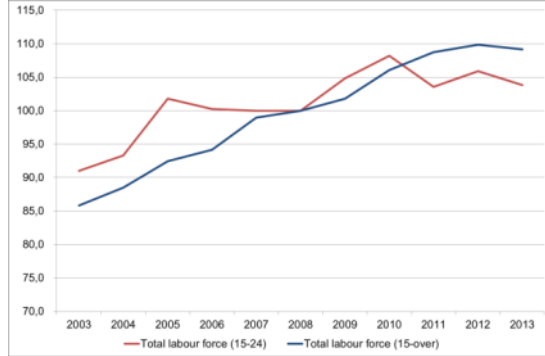


Figure 128. Trend in labour force in Cyprus



Source: Eurostat

The following charts show the effect of the crisis on GDP and public expenditure. After 2008 the trend starts to change and, in the last two years, it starts to decline. In a similar way, general government expenditure is changing trend after a 10 year-period of growth.

Figure 129. Trend in GDP in Cyprus

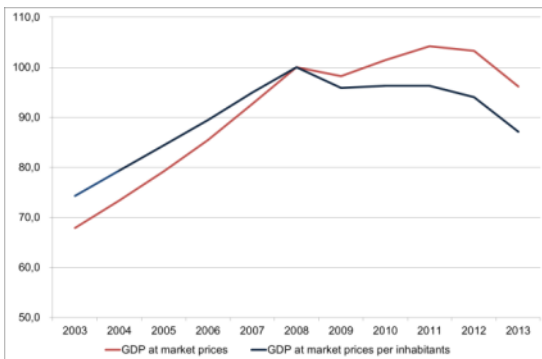
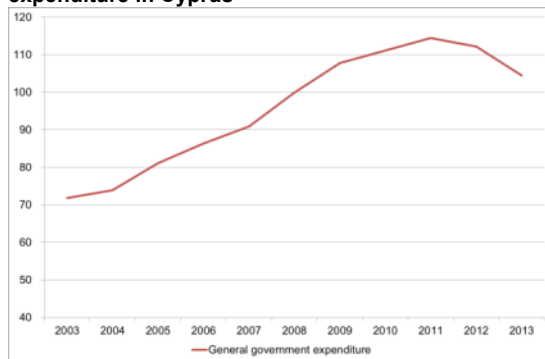


Figure 130. Trend in general government expenditure in Cyprus



Source: Eurostat

The effect of the crisis is shown by the loss of employment that, from 2011, has affected the country. Although general employment decreases by 4,5% from 2008, for young people the rate is much higher, with a 30% loss. Similarly, the number of self-employed follows a longer term trend of decline, especially for the young population.

Figure 131. Trend in employment in Cyprus

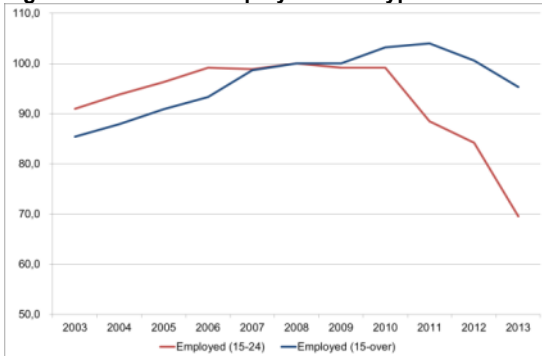
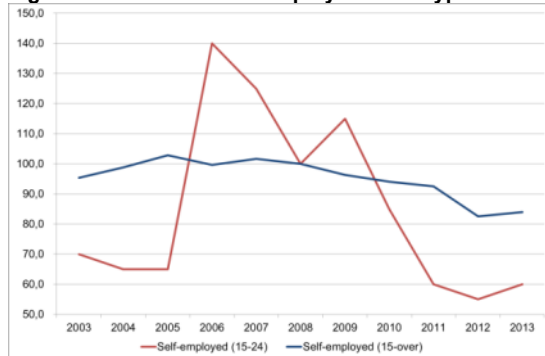


Figure 132. Trend in self-employment in Cyprus



Source: Eurostat

Social environment

The following indicators attempt a description of the level of openness and tolerance. The first 2 graphs show employment of women and their level of participation in the labour market.

After a period of increase, since 2011 women's employment has decreased following the general trend albeit at a slower rate. This is also true for the young female population. While 47% of employed are women, the rate for young women is 52,2% .

Figure 133. Trend in Female employment in Cyprus

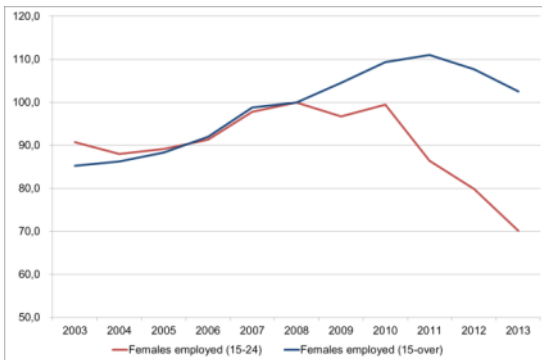
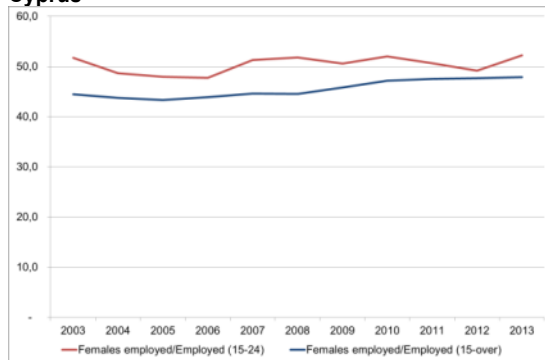


Figure 134. Female participation to labour market in Cyprus



Source: Eurostat

The trend of acquisition of citizenship in Cyprus is negative, like in many European countries and the crime indicator shows an increase in crimes from 2009 with an inversion of the trend only in the last year.

Figure 135. Acquisition of Citizenship in Cyprus

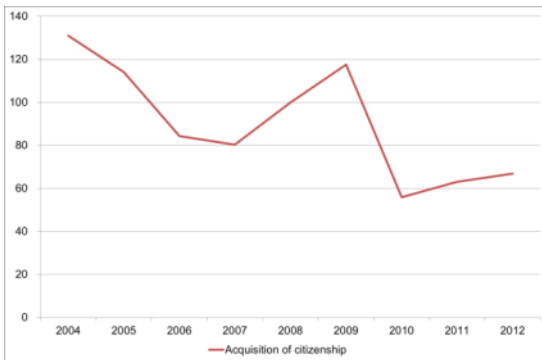
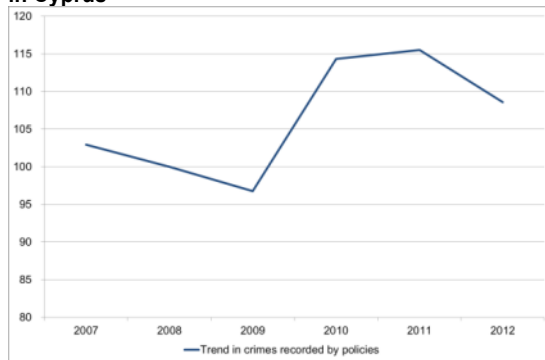


Figure 136. Trend in crimes recorded by the police in Cyprus



Source: Eurostat

The inclusion of young people in the education process is reaching a good level and the trend is positive but, after 2009, the number of your people at risk of poverty has increased.

Figure 137. Young people at risk of poverty or exclusion in Cyprus

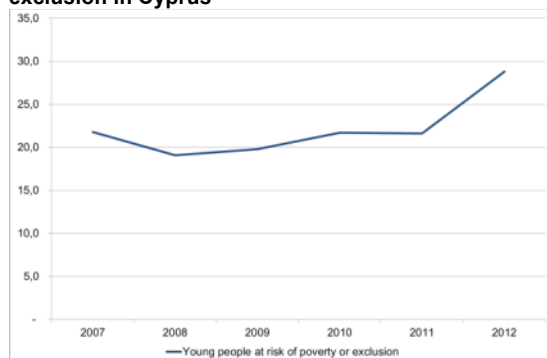
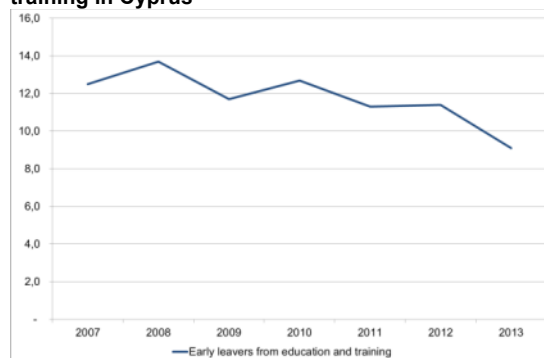


Figure 138. Early leavers from education and training in Cyprus



Source: Eurostat

The family trust indicator is very high in Cyprus and participation in voluntary activities is also strong, both for the adult and young population.

Table 13. Other trust indicators in Cyprus

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		93,9
Participation in informal voluntary activities	Adult	66,9
Participation in informal voluntary activities	Young	67,4
Participation in activities of charitable organisations		15,5

Source: Eurostat

Indeed, indicators show that there is a good level of trust amongst people in the country.

Culture and Creativity

Despite the general situation, the CCSs seem to have a vital trend: they register a faster growth than the general economy and do not seem to be afflicted by the crisis. In the last decade GDP has increased over 50% with a faster growth rate since 2009. The trend in the CCSs accounts for the general increase in the country's GDP (1,59% in 2011).

Figure 139. Trend of GDP in CCSs in Cyprus

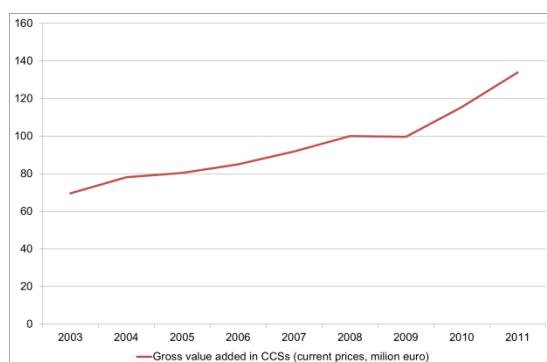
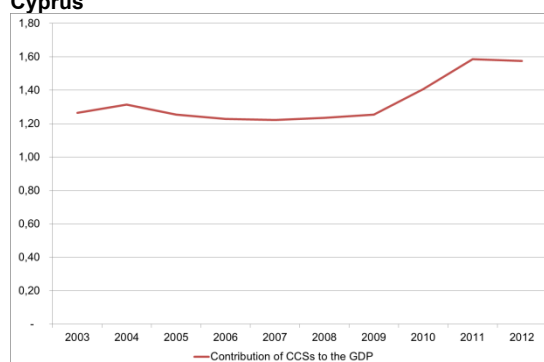


Figure 140. Contribution of CCSs to the GDP in Cyprus



Source: Eurostat

Public administration has reduced its commitment to the cultural sector especially since 2011. Still, as shown by the composition of cultural expenditure on total expenditure this trend started already in 2008.

Figure 141. Trend in public expenditure in Culture in Cyprus

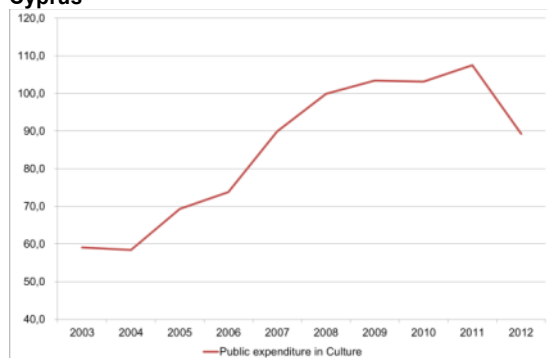


Figure 142. Public cultural expenditure on total public expenditure in Cyprus



Source: Eurostat

Demand and Supply of Culture and Creativity

As regards supply, there are not many indicators available: there are 3 UNESCO cultural sites. The following tables show that cultural consumption is indeed very low.

Table 14. Number of UNESCO cultural sites and museums in Cyprus

Description	Year	Number
UNESCO cultural sites	2013	3
Museums		n/a

Source: Eurostat, EGMUS

25,6% of the population claims to visit cultural sites (7,1% repeat the experience more than 4 times per year); 35% goes to the cinema (17,8% more than 4 times per year) and 41,2% declares attending live performances (12,9% more than 4 times per year).

Table 15. Cultural behaviours in Cyprus

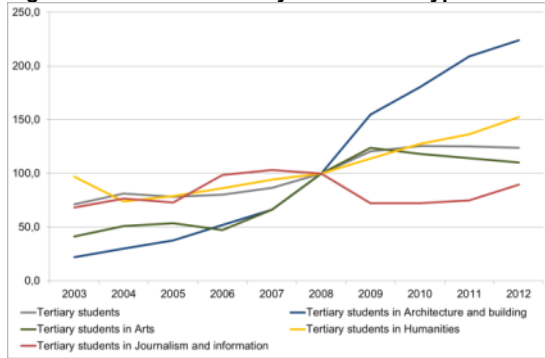
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	58,8	28,4	9,0	2,3	1,6
Times going to the cinema	65,0	17,3	9,1	4,8	3,9
Visits to cultural sites	74,4	18,5	4,7	1,1	1,3

Source: Eurostat

Education

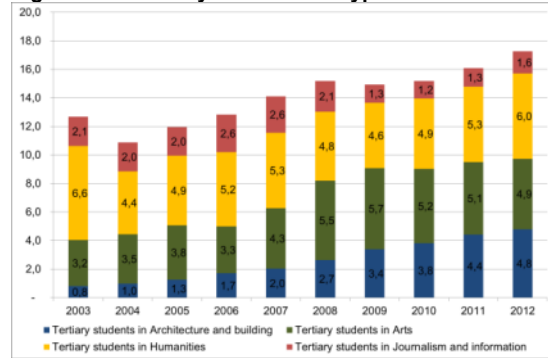
The general trend in tertiary education shows that the number of those who decide to study cultural-related subjects is growing. The most important trend is registered by Architecture and building: in this case the high growth rate is due to the low starting level. Students in the Humanities have grown in the last 5 years while students in the Arts follow the general trend and students in Journalism and information are fewer than in 2003.

Figure 143. Trend in tertiary students in Cyprus



Source: Eurostat

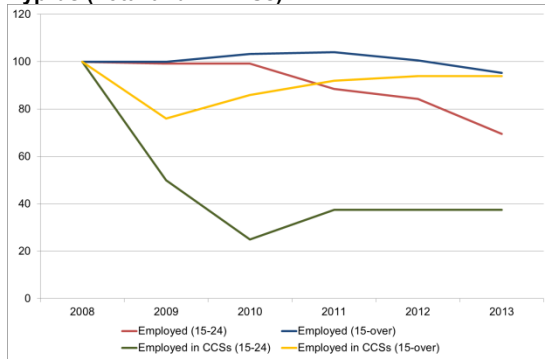
Figure 144. Tertiary students in Cyprus



Employment and Young employment

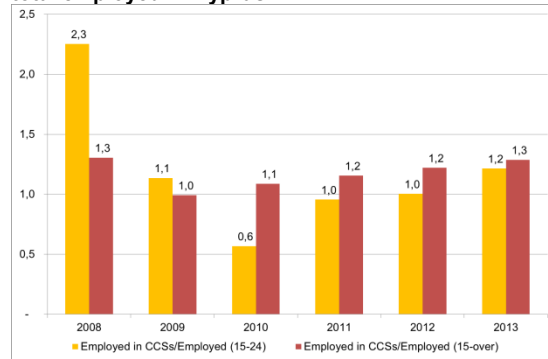
The trend in employment in the CCSs is shown in the charts below. Although there is a negative trend for young people, general labour market employment in CCSs shows a better performance than the general trend.

Figure 145. Employment and young employment in Cyprus (Total and in CCSs)



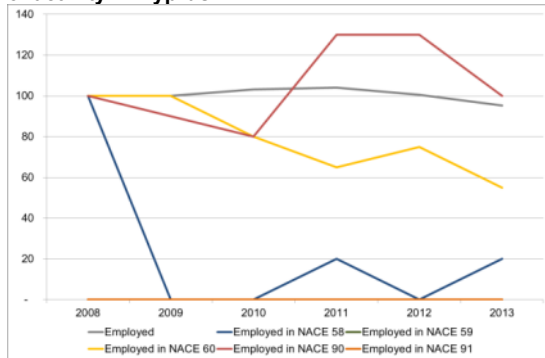
Source: Eurostat

Figure 146. Composition of Employed in CCSs on total employed in Cyprus



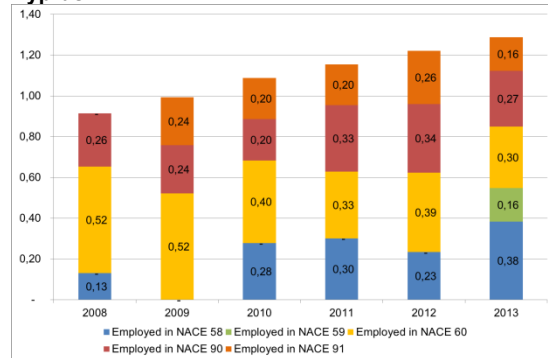
The analysis of the CCSs per typology of activity shows that since there is a lack of data in 2 sectors (“Publishing activities” and “Libraries, archives and museums”) only a partial dimension of the phenomenon is possible. Indeed, the only sector that shows a higher performance is the “Creative arts and entertainment” sector (NACE 90) while the “Programming and broadcasting” sector has decreased by 40% in the past 5 years.

Figure 147. Trend in Employment in CCSs for sector of activity in Cyprus



Source: Eurostat

Figure 148. Composition of employed in CCSs in Cyprus



The lack of data on the employment young people makes it impossible to provide any analysis as to it.

ICT

About every Cypriote owns a mobile telephone, making mobile telecommunication the most dynamic sector in the country. The trend for fixed telephones shows a slow decrease as in many other developed countries whereas the growth of broadband is similar to that of other European countries. The use of the Internet is lower than the European average, reaching 65% of the population.

Figure 149. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Cyprus

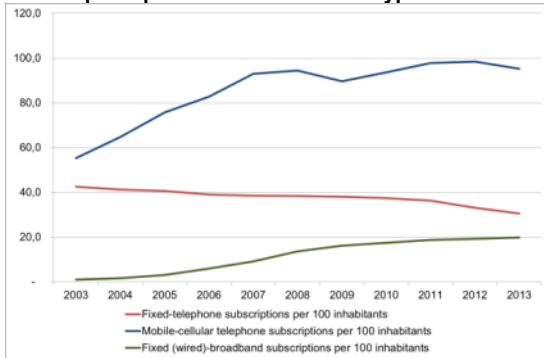
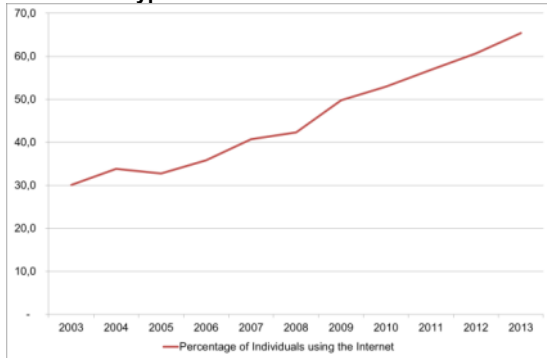


Figure 150. Percentage of Individuals using the Internet in Cyprus



Source: Eurostat

The lack of data for employment in the “Information services” (NACE 63) gives a partial view of the labour market in the ICT sector. In general terms, after a period of strong growth the “Computer programming” sector (NACE 62) is going back to the levels of 2008 while employment in “Telecommunication” (NACE 61) shows a slow decline although less than that shown by the general figures of the labour market.

Figure 151. Trend in ICT Employment in Cyprus

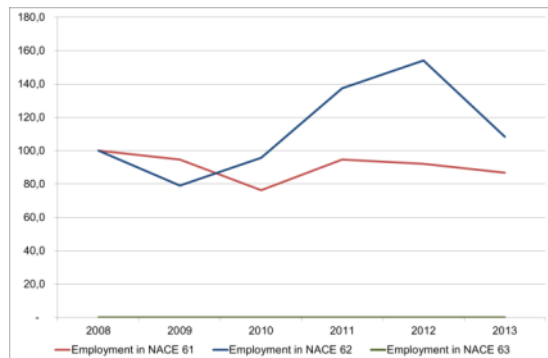
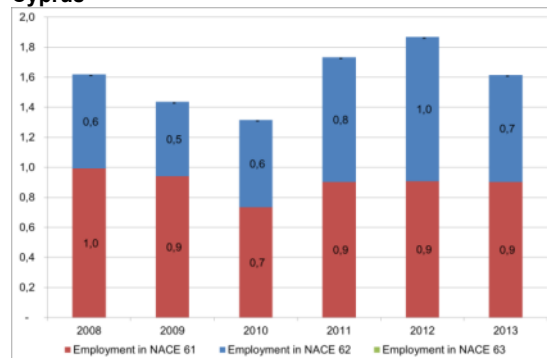


Figure 152. Composition of ICT Employment in Cyprus



Source: Eurostat

CZECH REPUBLIC

The Czech Republic has a population of 10,5 million and has been a member of the European Union since 2004. In the last 10 years the population registered a moderate growth but the trend for young people is strongly negative. The following charts show that the same trend applies in the labour force.

Figure 153. Trend in population in the Czech Republic

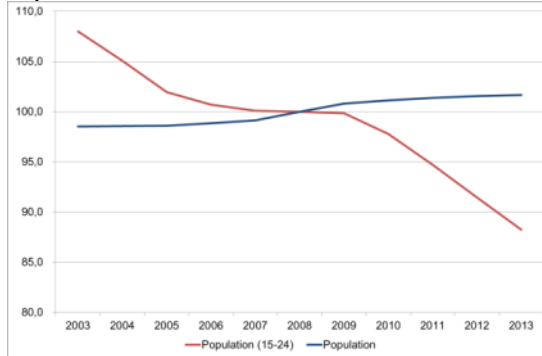
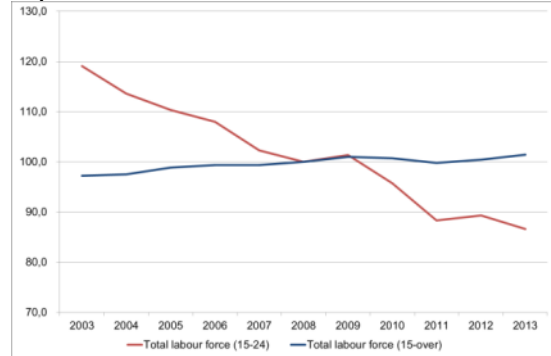


Figure 154. Trend in labour force in the Czech Republic



Source: Eurostat

The following indicators show the GDP and public expenditure trend both before and after the 2007 crisis. After a period of constant growth, in 2008 GDP dropped and started to grow again but, since 2011, it has started to decrease and public policy expenditure has followed the same trend.

Figure 155. Trend in GDP in the Czech Republic

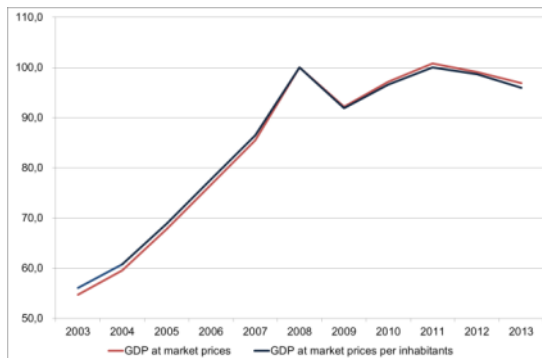
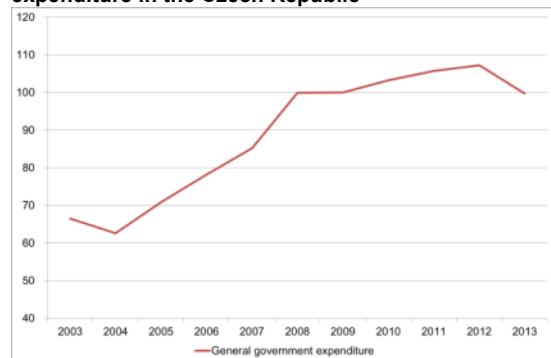


Figure 156. Trend in general government expenditure in the Czech Republic



Source: Eurostat

With a 20% loss as of 2008 the effect of the crisis is clear as regards young employment. Nevertheless, general employment is quite stable with a loss of 1,3% over a 5 year period. Self-employment registered a slight increase both for young and adults as of 2008 but the trend has changed as of last year.

Figure 157. Trend in employment in the Czech Republic

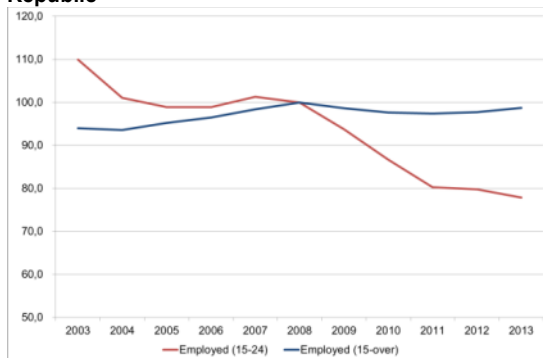
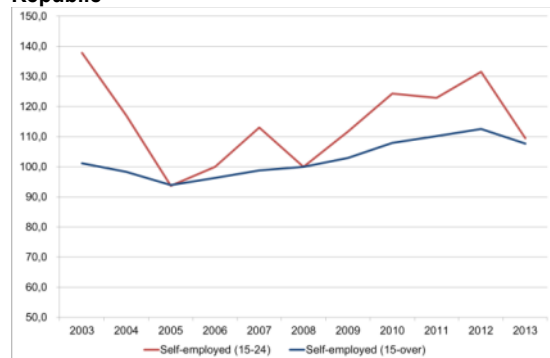


Figure 158. Trend in self-employment in the Czech Republic



Source: Eurostat

Social environment

Although women's employment reacts better than the general trend, as in many other countries employment of young women has a worse outcome. The result is a strong gender imbalance between the young employed. As for adult employment, women account for 43,4%.

Figure 159. Trend in Female employment in the Czech Republic

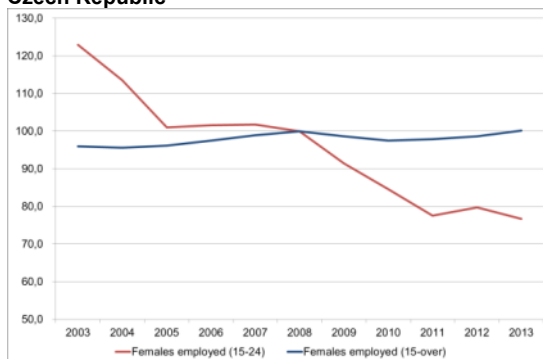
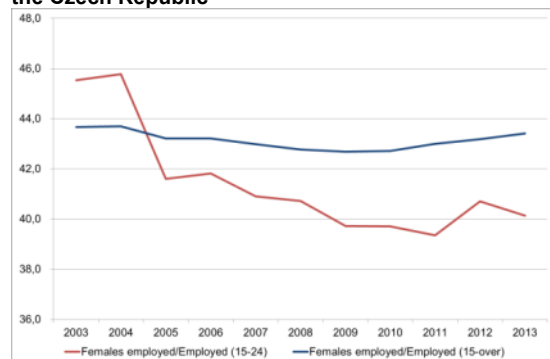


Figure 160. Female participation to labour market in the Czech Republic



Source: Eurostat

The following charts show the trend for 2 indicators that give an idea on social environment in the Czech Republic. Starting in 2004, policies for the granting of citizenship changed following the entry of the Czech Republic in the European Union and the numbers of those being granted Czech citizenship decreased dramatically. On the hand, the crime indicator has registered a decrease as of 2007.

Figure 161. Acquisition of Citizenship in the Czech Republic

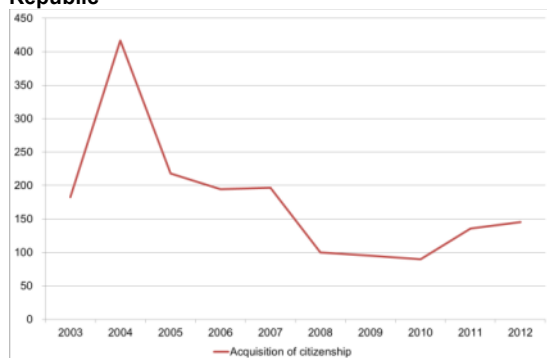
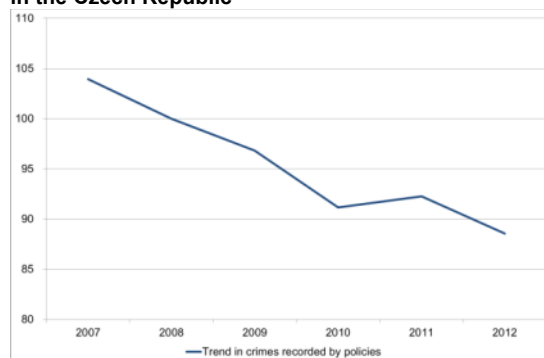


Figure 162. Trend in crimes recorded by the police in the Czech Republic



Source: Eurostat

One of the effects of the crisis on the young population has been the increase in the risk of poverty and exclusion which started to grow in 2009. Also, in the same period the number of early school leavers has grown as a result of generalised societal difficulties.

Figure 163. Young people at risk of poverty or exclusion in the Czech Republic

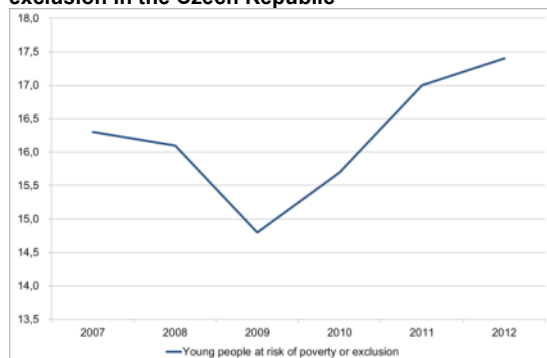
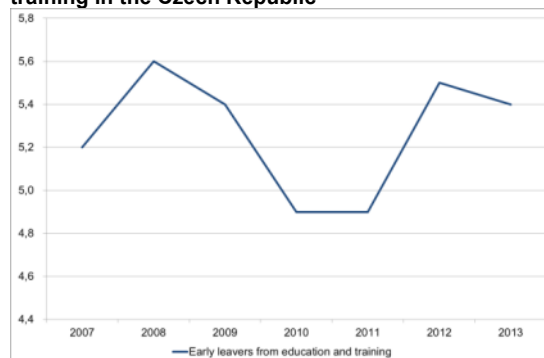


Figure 164. Early leavers from education and training in the Czech Republic



Source: Eurostat

As shown in the following table, family trust is very high in the Czech Republic while general trust in society is very low. Only 4,5% of adults join voluntary activities (3,5% of the young population) and 3.3% declare to participate in activities in charitable organizations.

Table 16. Other trust indicators in the Czech Republic

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		90,8
Participation in informal voluntary activities	Adult	4,5
Participation in informal voluntary activities	Young	3,5
Participation in activities of charitable organisations		3,3

Source: Eurostat

Culture and Creativity

The following charts show the contribution of CCSs to the general economy. Although the trend in GDP growth in the CCSs is considerably high in the first part of the decade, as of 2008 it started to decline and, in the last year available (2012), a negative trend surfaced. Similarly, the contribution of CCSs to general growth has declined as of 2006 and has reached 1,45% in 2012.

Figure 165. Trend of GDP in CCSs in the Czech Republic

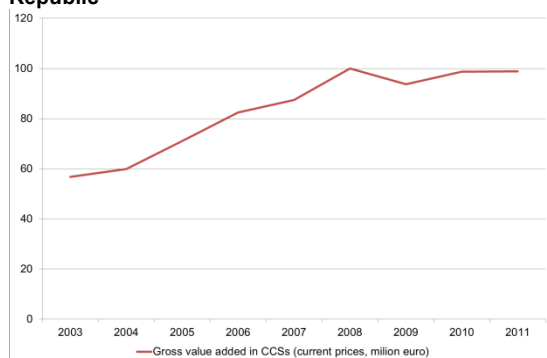
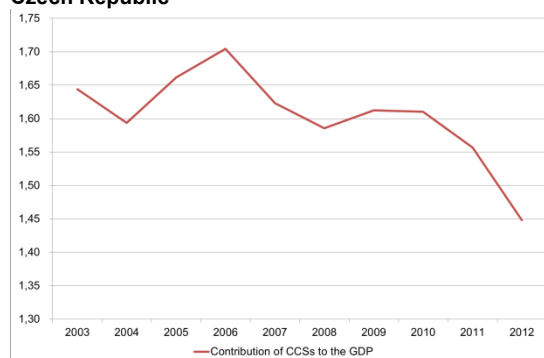


Figure 166. Contribution of CCSs to the GDP in the Czech Republic



Source: Eurostat

However, public expenditure in culture has strongly increased in the last 3 years, with an increase of 80% between mid-2011 and mid-2012 (the most important increase is in the “Recreation, Culture and religion” sector). At the same time, public expenditure in culture rose to an 8% of public expenditure (from 5% in 2011).

Figure 167. Trend in public expenditure in Culture in the Czech Republic

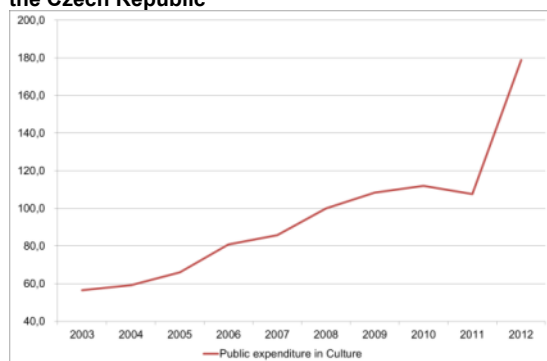
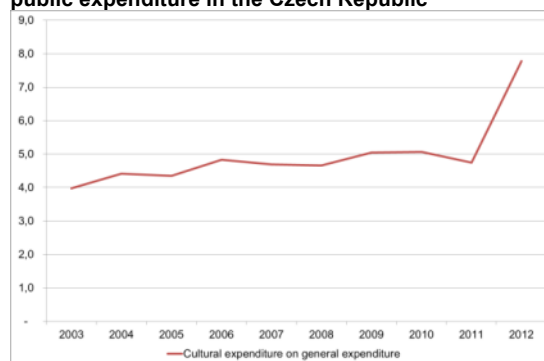


Figure 168. Public cultural expenditure on total public expenditure in the Czech Republic



Source: Eurostat

Demand and Supply of Culture and Creativity

The Czech Republic has 12 UNESCO cultural sites and 486 museums (4,16 per 100.000 inhabitants). As regards supply, the Czech Republic has a considerable heritage offer.

Table 17. Number of UNESCO cultural sites and museums in the Czech Republic

Description	Year	Number
UNESCO cultural sites	2013	12
Museums	2013	486

Source: Eurostat, EGMUS

As regards demand, 44,1% of the population visits cultural sites; 35,3% goes to the cinema and 36,6% attends live performances. More than 13% visit cultural sites and goes to the cinema more than 4 times per year while 8,6% declares attending live performances more than 4 times per year.

Table 18. Cultural behaviours in the Czech Republic

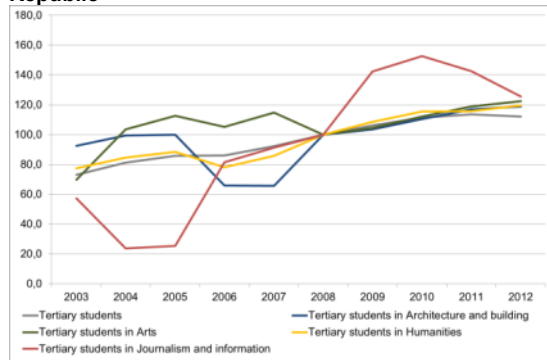
Description/times	none	1-3	4-6	7-12	more than 12
Times going to live performances	63,4	26,0	6,4	2,6	1,6
Times going to the cinema	64,7	22,2	7,5	3,5	2,1
Visits to cultural sites	56,0	30,7	9,4	2,6	1,4

Source: Eurostat

Education

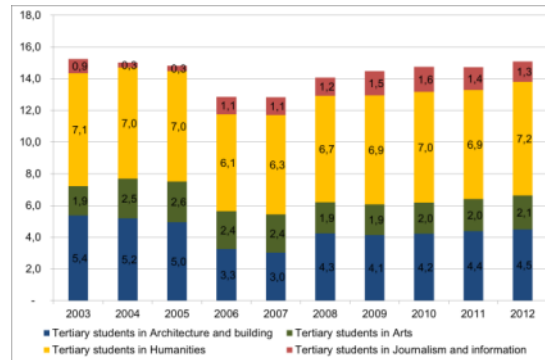
The following charts show the trend in tertiary students. From 2008 the trend is similar for all the disciplines and only for journalism and information data shows a strong fluctuation during the past 10 years. Students in the Humanities are the most numerous (7,2%) whereas students in Architecture and building account for 4,5% and those in the Arts for 2,1%. The total number of students in culture-related subjects accounts for approximately 14% of the student population in tertiary education.

Figure 169. Trend in tertiary students in the Czech Republic



Source: Eurostat

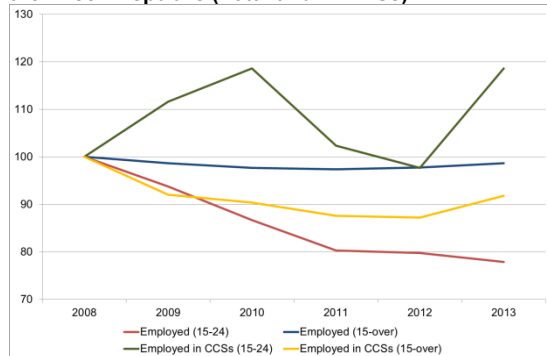
Figure 170. Tertiary students in the Czech Republic



Employment and Young employment

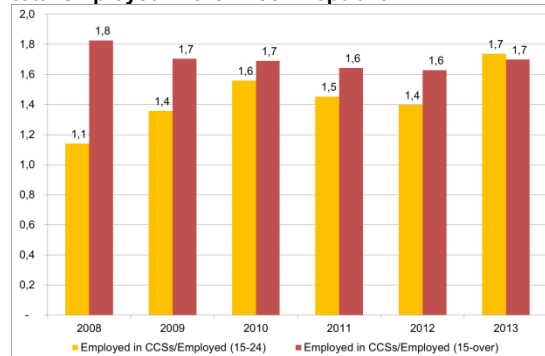
In the Czech Republic employment in the CCSs accounts for 1,7% and for 5,5% of young people. The general trend shows that employment in the CCSs has a better performance especially among young people. In 2013 the number of the young employed in the CCSs inverted a trend that was slightly decreasing since 2010.

Figure 171. Employment and young employment in the Czech Republic (Total and in CCSs)



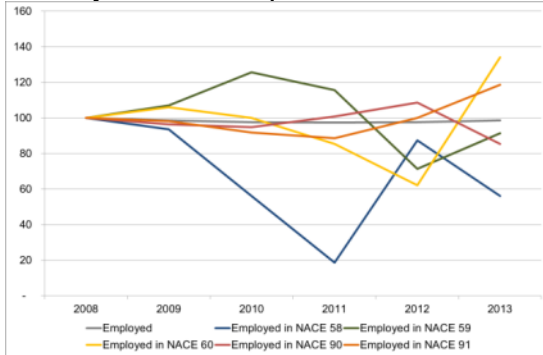
Source: Eurostat

Figure 172. Composition of Employed in CCSs on total employed in the Czech Republic



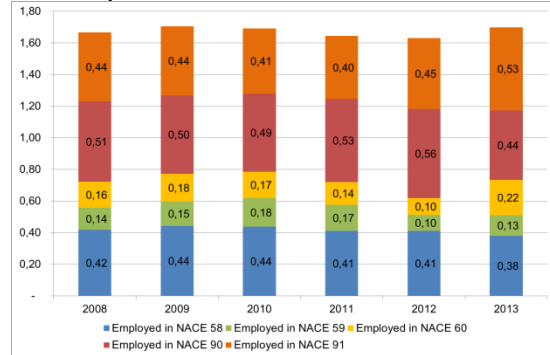
The following charts show the analysis by sector: 56% of employed in the CCSs are in the “Arts - Creative arts and entertainment” sector (NACE 90) and in the “Libraries, archives and museums” sector (NACE 91); these 2 sectors influence the general trend in employment in the CCSs.

Figure 173. Trend in Employment in CCSs for sector of activity in the Czech Republic



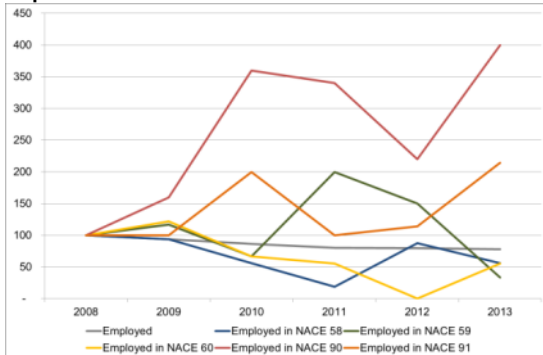
Source: Eurostat

Figure 174. Composition of employed in CCSs in the Czech Republic



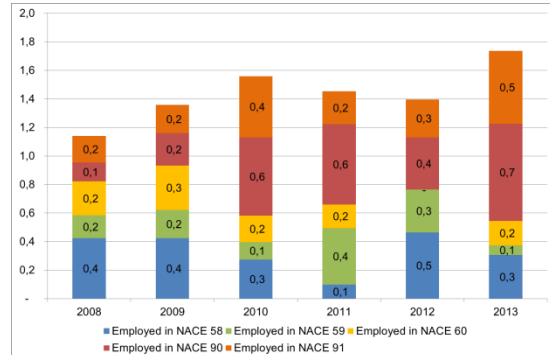
As regards young people the composition of employment changes considerably from one year to the next the reason being the limited numbers of the young people employed in the CCSs.

Figure 175. Trend in Employment in CCSs for sector of activity for young employed in the Czech Republic



Source: Eurostat

Figure 176. Composition of employed in CCSs for young employed in the Czech Republic



ICT

In the Czech Republic the ICTs register the same general trend as in the rest of Europe. On the one hand, mobile subscriptions are increasing rapidly while, on the other, the number of fixed telephones is decreasing. Broadband penetration increases with a trend similar to that of other countries and the percentage of the population that uses the Internet is over 70%.

Figure 177. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in the Czech Republic

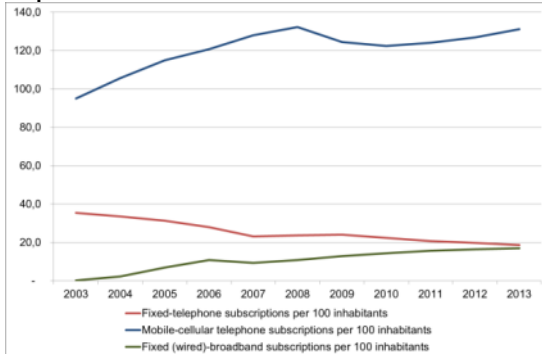
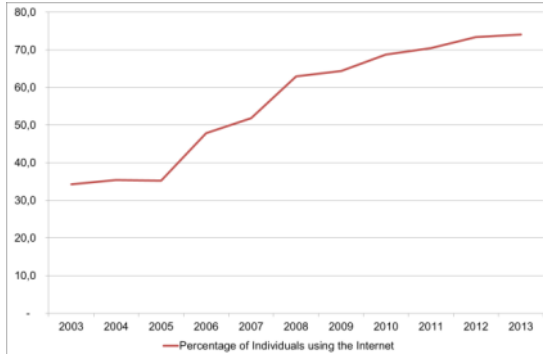


Figure 178. Percentage of Individuals using the Internet in the Czech Republic



Source: Eurostat

The trend in employment in the ICT sector is more dynamic than the general trend, with the exception of the “Telecommunications” sector (NACE 61) which is facing a strong crisis and has, since 2011, lost over 28% of those employed. The “Computer programming” sector (NACE 62) accounts for 64,1% of the employed in the CCSs and has registered a 53% growth in the period analysed.

Figure 179. Trend in ICT Employment in the Czech Republic

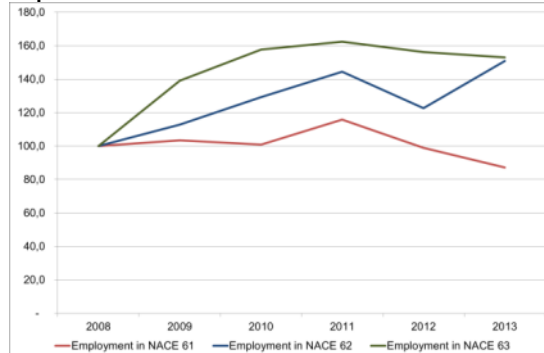
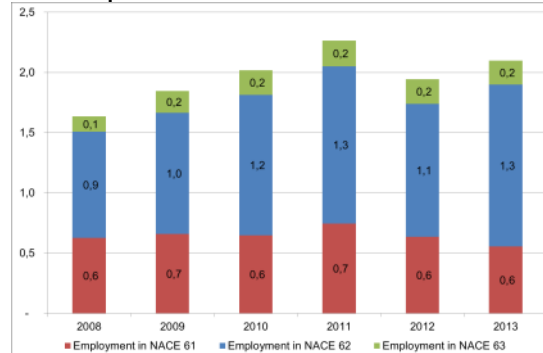


Figure 180. Composition of ICT Employment in the Czech Republic



Source: Eurostat

DENMARK

Denmark has been member of the European Union since 1973. In 2013 it had population of over 5,6 million, of which 700.000 aged 15 to 24.

The following graphs show the trend as regards both population and labour force: Denmark is one of the few countries in which the young population grows faster than the adult one; but, as regards labour force, it has started to decrease in 2008 with young labour force at a fluctuating trend.

Figure 181. Trend in population in Denmark

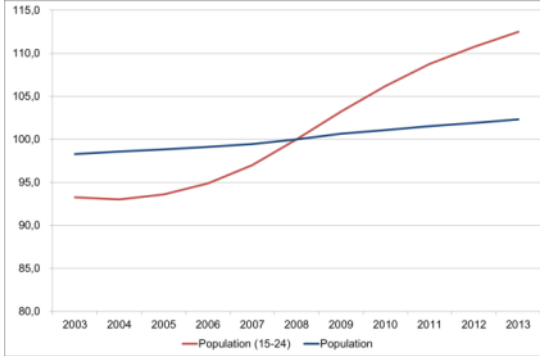
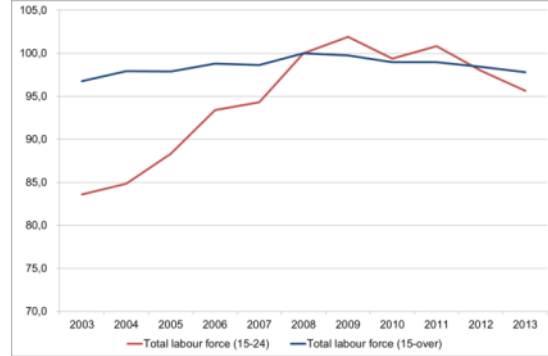


Figure 182. Trend in labour force in Denmark



Source: Eurostat

As regards GDP growth it can be noted that, after a halt in 2008, it started to grow again in 2009 registering a 6% increase from 2008 to 2013. In the same period the total public expenditure registered a constant increase until 2012 when the trend was inverted.

Figure 183. Trend in GDP in Denmark

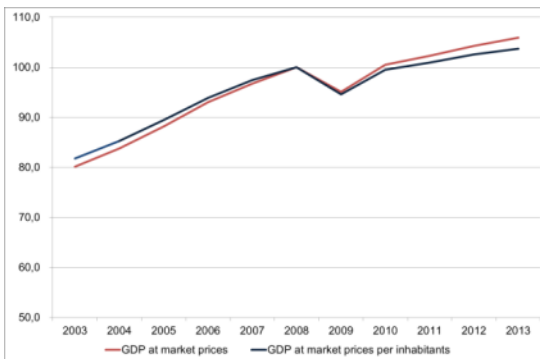
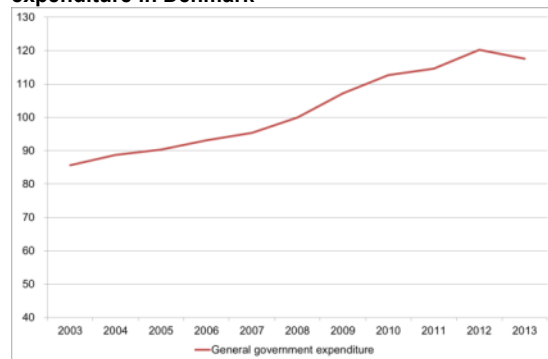


Figure 184. Trend in general government expenditure in Denmark



Source: Eurostat

After 2008 employment in Denmark started to decrease also as regards young people who, in the same period, lost about 10% of the employed. As regards self-employment, the trend is moderate but the situation of young employed is extremely changeable: on the one hand, the number of the young self-employed is low while, on the other, the young self-employed are more resilient to change in the labour market.

Figure 185. Trend in employment in Denmark

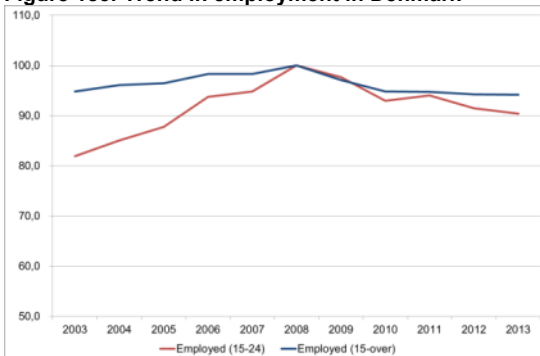
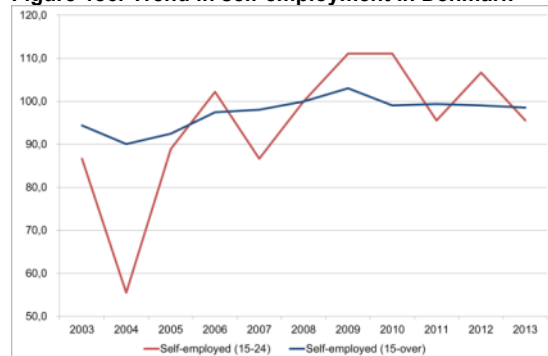


Figure 186. Trend in self-employment in Denmark



Source: Eurostat

Social environment

In Denmark 47,5% of the employed are women and the number of young women employed exceeds that of adults. The trend in employment follows the general trend but the number of women employed decreases at a slower rhythm than the general trend.

Figure 187. Trend in Female employment in Denmark

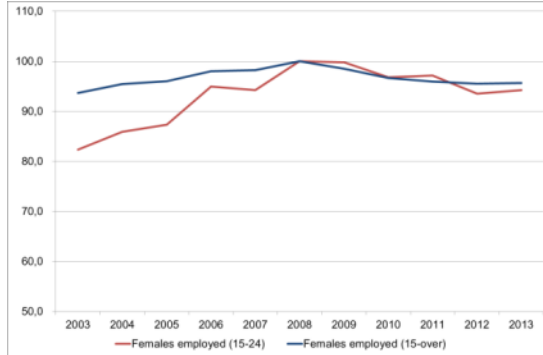
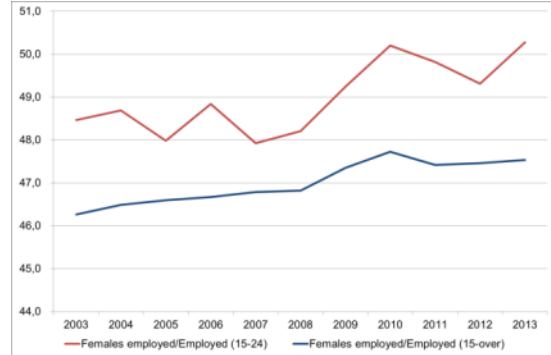


Figure 188. Female participation to labour market in Denmark



Source: Eurostat

The following indicators help understand social environment: the number of new citizens has highly decreased since 2004 whereas the crime rate increased until 2007 and then started a lower turn.

Figure 189. Acquisition of Citizenship in Denmark

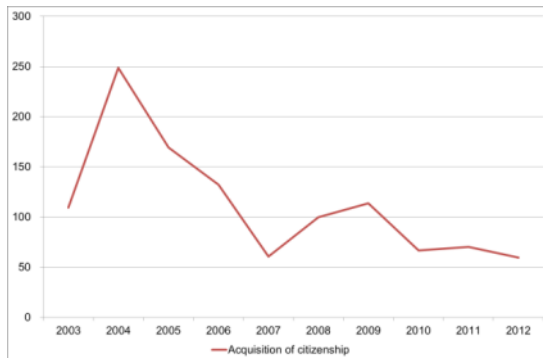
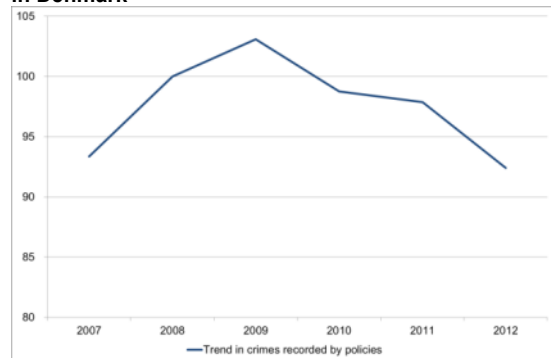


Figure 190. Trend in crimes recorded by the police in Denmark



Source: Eurostat

Trust in general environment is confirmed by the following graphs which show that, while the number of young people at risk of poverty is increasing, the number of early school leavers is strongly decreasing.

Figure 191. Young people at risk of poverty or exclusion in Denmark

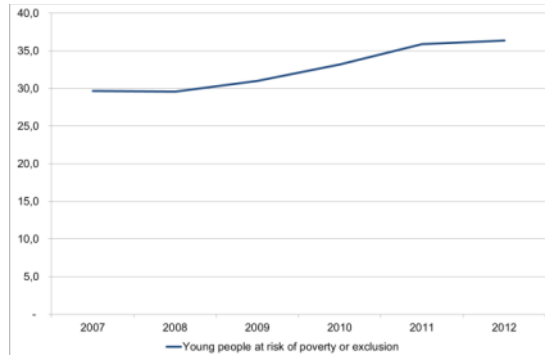
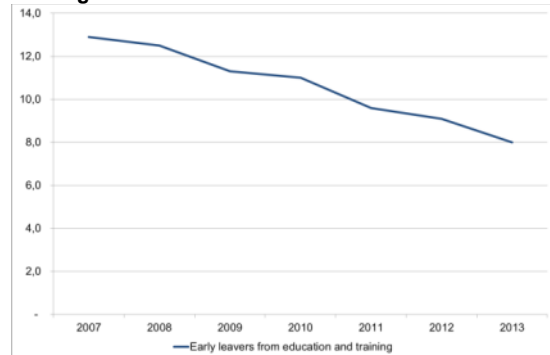


Figure 192. Early leavers from education and training in Denmark



Source: Eurostat

In Denmark, the social structure relies strongly on family and trust: indeed, 97,1% of the Danes declare to be able to ask relatives or friends for help. Similarly, the active participation of the citizenship is very low and only 3% of adults declare to participate in voluntary activities (only 2,3% among young people) but 12,1% participate in activities by charitable organizations. The table below shows that there is a different tradition or behaviour: participation in voluntary activities is very low if compared to other countries but participation in activities by charitable organizations is higher than the European average.

Table 19. Other trust indicators in Denmark

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		97,1
Participation in informal voluntary activities	Adult	3,0
Participation in informal voluntary activities	Young	2,3
Participation in activities of charitable organisations		12,1

Source: Eurostat

Culture and Creativity

The creative sector contributes 1,83% to the total GDP in Denmark. However, the trend in the past 10 years has been negative and general contribution to GDP has strongly decreased since 2003 and, in absolute terms.

Figure 193. Trend of GDP in CCSs in Denmark

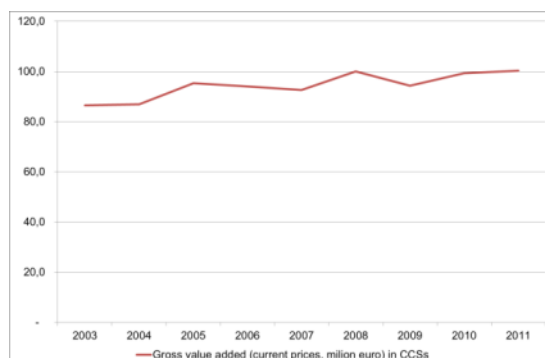
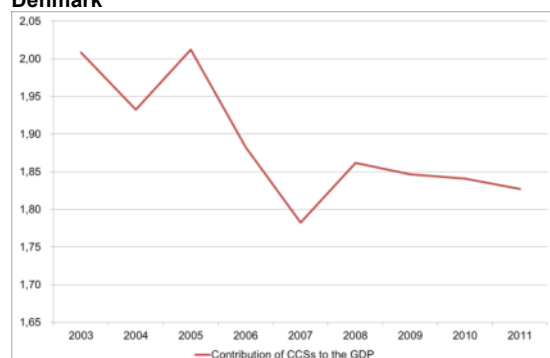


Figure 194. Contribution of CCSs to the GDP in Denmark



Source: Eurostat

The general trend is confirmed by the graphs below: in the last years, public expenditure in culture has suffered strong cuts falling at 4,1% of the total expenditure in 2010, the worst situation in 10 years. The increase in trend that has followed is only a monetary illusion.

Figure 195. Trend in public expenditure in Culture in Denmark

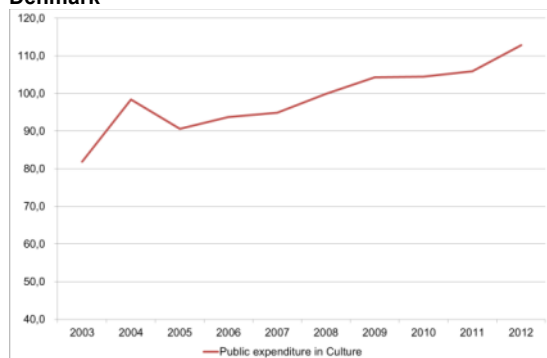
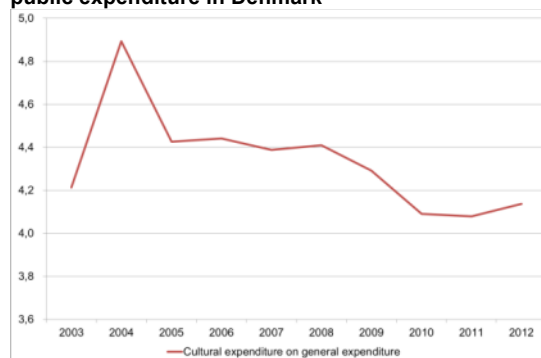


Figure 196. Public cultural expenditure on total public expenditure in Denmark



Source: Eurostat

Demand and Supply of Culture and Creativity

As regards supply, Denmark has 3 UNESCO cultural sites and 281 museums: a considerably high number in relation to the overall population (4,5 per 100.000 inhabitants).

Table 20. Number of UNESCO cultural sites and museums in Denmark

Description	Year	Number
UNESCO cultural sites	2013	3
Museums	2011	281

Source: Eurostat, EGMUS

As regards demand, 54,3% of the population visits cultural sites; 59,3% goes to the cinema and 52,8% attends live performances thus demonstrating a strong attitude towards cultural participation. Over 22% of the population visits cultural sites more than 4 times a year; 24,7% goes to the cinema more than 4 times a year and 18,1% attends live performances more than 4 times a year.

Table 21. Cultural behaviours in Denmark

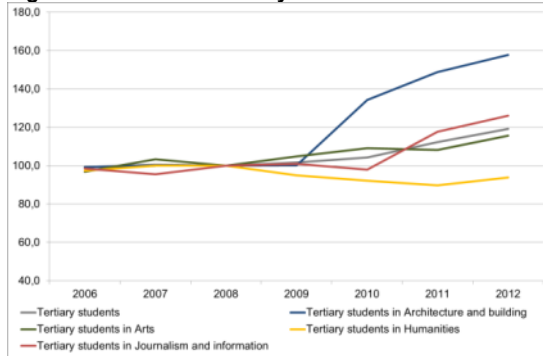
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	47,2	34,7	11,5	4,7	1,9
Times going to the cinema	40,7	29,3	11,9	8,8	4,0
Visits to cultural sites	45,7	32,2	12,5	5,0	4,6

Source: Eurostat

Education

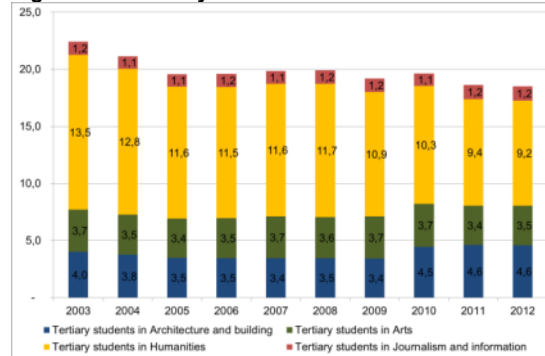
The trend in tertiary education is shown in the charts below: the most important trend is the one registered in "Architecture and building" with 4,6% of the total number of students while the number, although small, of students in "Journalism and information" grows at a faster rate than the general trend (1,2% of total students). The number of students in the "Humanities" registers a negative trend going down from 16,5% to 9,2% and the number of students in the "Arts" registers a slight positive trend albeit lower than that of the total of students.

Figure 197. Trend in tertiary students in Denmark



Source: Eurostat

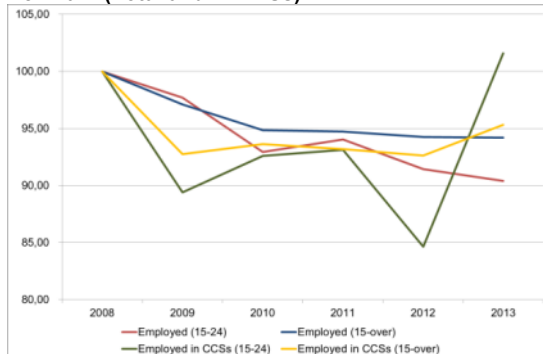
Figure 198. Tertiary students in Denmark



Employment and Young employment

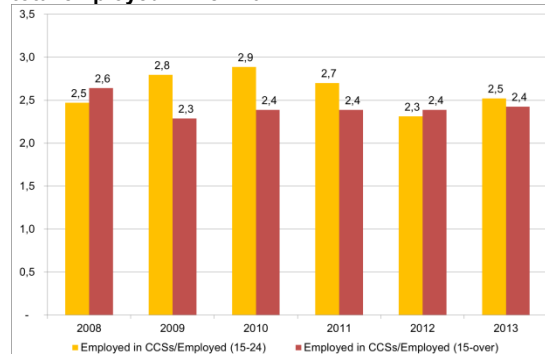
The charts below show the trend of employment in Denmark in the CCSs compared to the general trend. Those employed in the CCSs are 2,5% (5% among young people) and, starting from 2008, the general trend has been negative. On the one hand, the negative trend of employment in the country has affected the CCSs whereas, on the other, the trend for CCSs in the last year has followed an inverse trend.

Figure 199. Employment and young employment in Denmark (Total and in CCSs)



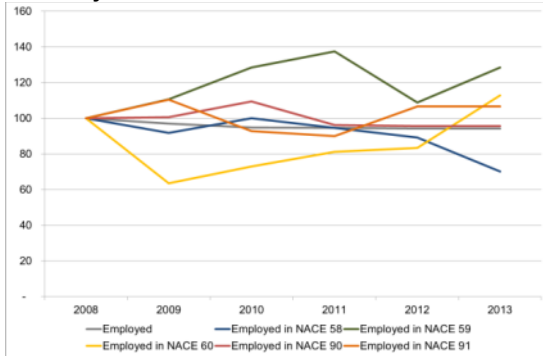
Source: Eurostat

Figure 200. Composition of Employed in CCSs on total employed in Denmark



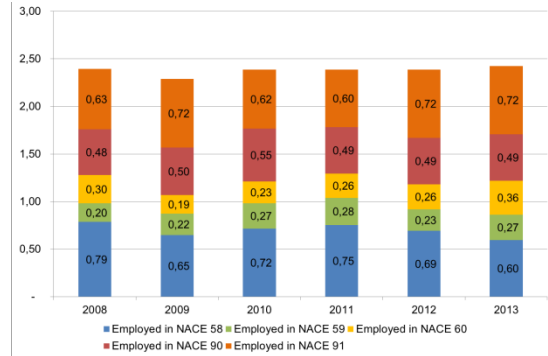
The following graph shows the trend for each NACE sector: the most dynamic sector is the “Motion picture and television” sector (NACE 59) which represents 11% of total employment in the CCSs; a good performance is registered by the “Libraries, archives and museums” sector (NACE 91) which represents 29,6% of the total employed in the CCSs. The “Creative art end entertainment” sector (NACE 90) account for 20.1% of the total employed in the CCSs and follows a trend similar to the general one while “Publishing” activities (NACE 58) have registered a negative trend, falling from 32,8% in 2008 to 24,5% in 2013.

Figure 201. Trend in Employment in CCSs for sector of activity in Denmark



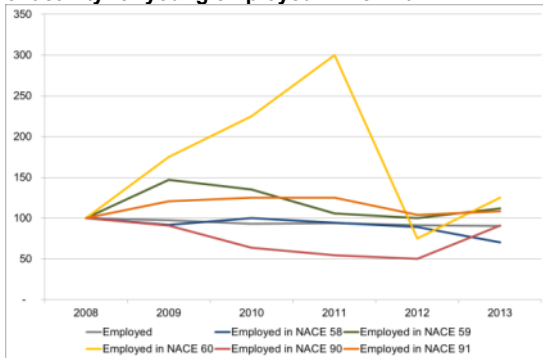
Source: Eurostat

Figure 202. Composition of employed in CCSs in Denmark



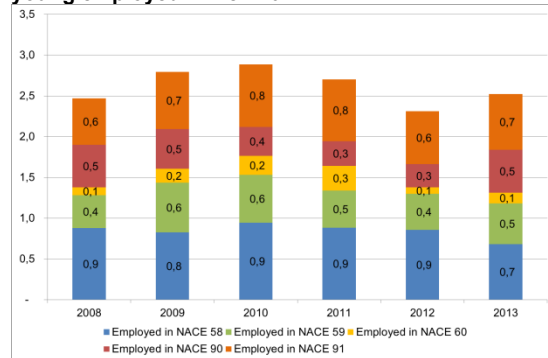
A similar trend appears as regard young people, except for seasonal phenomena (see graph below): the most resilient sectors seem to be the “Motion pictures” and “Libraries, archives and museums” with the last often connected with to the public sector.

Figure 203. Trend in Employment in CCSs for sector of activity for young employed in Denmark



Source: Eurostat

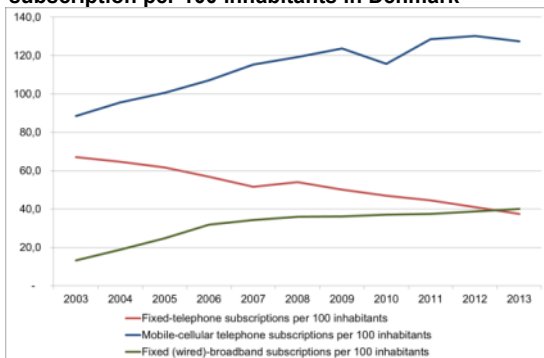
Figure 204. Composition of employed in CCSs for young employed in Denmark



ICT

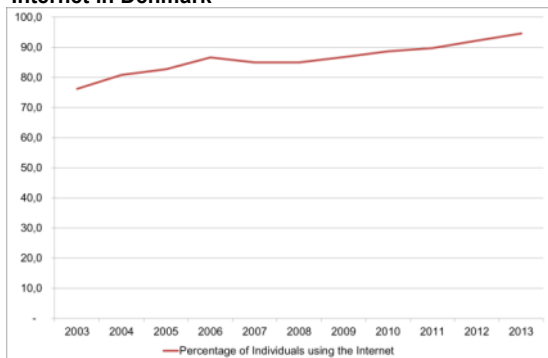
The analysis of the ICT sector in Denmark shows that the country is highly dynamic: on the one hand, mobile technologies are growing faster and, in parallel, fixed ones are decreasing faster than in other countries; on the other, broadband penetration is very high with over 40% of the population having access to it and over 90% of people use the Internet.

Figure 205. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Denmark



Source: Eurostat

Figure 206. Percentage of Individuals using the Internet in Denmark



While the “Telecommunication” sector (NACE 61) has lost employees, going from 22,7% to 14% of the total employed in the ICT, a positive trend is registered by the other 2 sectors and, in particular, by the “Information services” sector (NACE 63) that represents a little portion of the total employed in the ICTs. As regards the “Computer programming” sector (NACE 62) it has shown a good performance and represents with over 80% of the total employed in the ICTs.

Figure 207. Trend in ICT Employment in Denmark

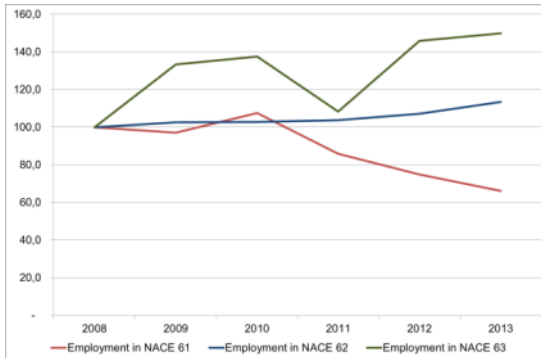
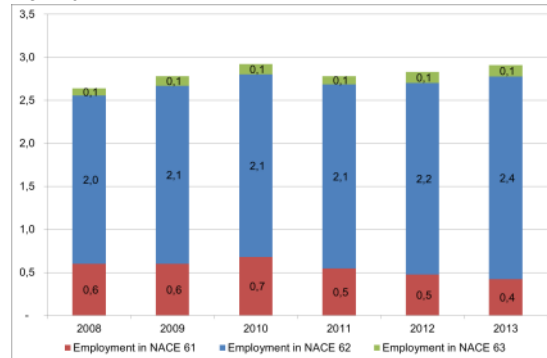


Figure 208. Composition of ICT Employment in Denmark



Source: Eurostat

ESTONIA

Estonia, one of the three small Baltic countries, has a population of 1,3 million inhabitants and is a member of the European Union since 2004.

In the last 10 years the total population and labour force has slightly decreased especially as regards young people.

Figure 209. Trend in population in Estonia

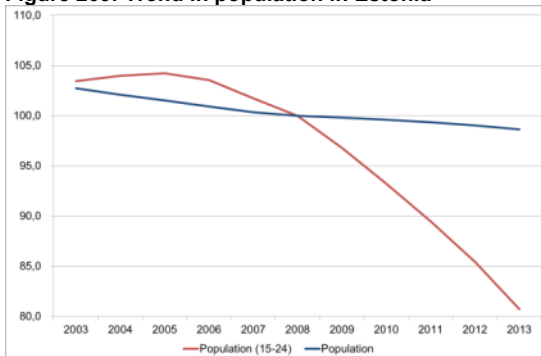
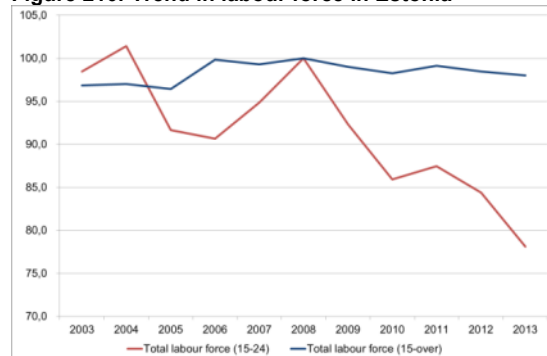


Figure 210. Trend in labour force in Estonia



Source: Eurostat

In the past 10 years the country registered a positive trend in GDP and, consequently, also in public expenditure. The graphs below show the effect of the crisis: as of 2007, and after two years of stall, GDP started to grow again with a rate similar to that of the pre-crisis years.

Figure 211. Trend in GDP in Estonia

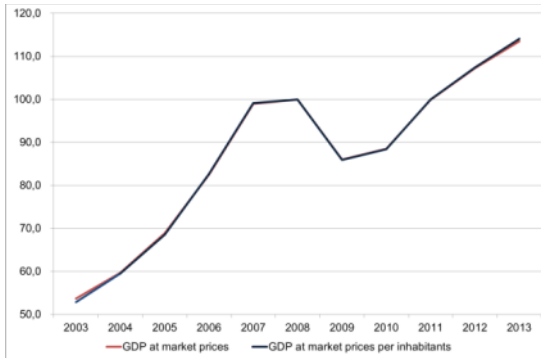
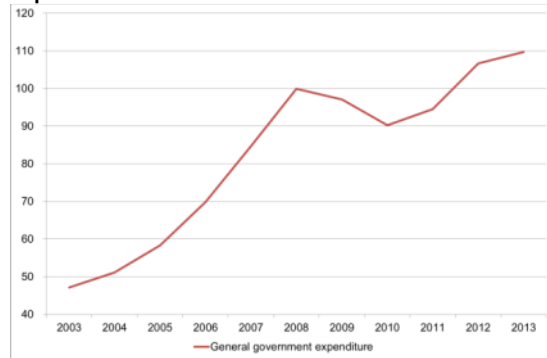


Figure 212. Trend in general government expenditure in Estonia



Source: Eurostat

The situation as regards employment and self-employment demonstrates that although young people are particularly affected by the negative trend generated by the crisis the self-employed have reacted faster to the situation than the employed.

Figure 213. Trend in employment in Estonia

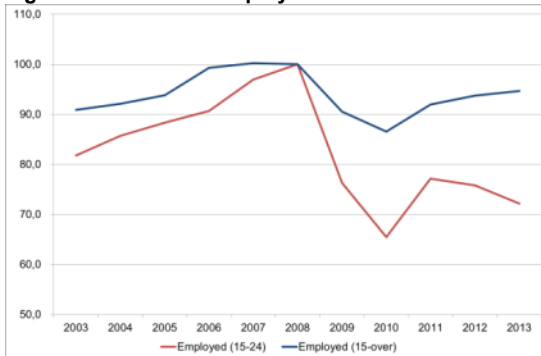
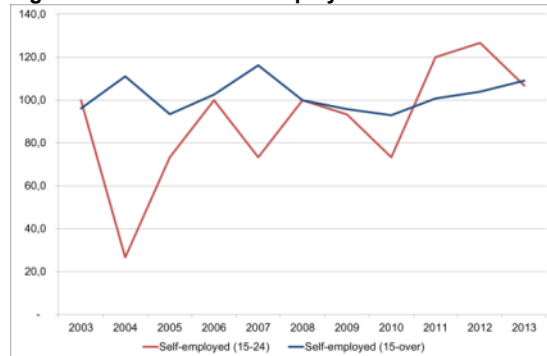


Figure 214. Trend in self-employment in Estonia



Source: Eurostat

Social environment

Estonia shows a high “gender equality” profile: indeed, about 50% of those employed are women both among the adult and the young population. The trend as regards employment of women is quite similar to the general one.

Figure 215. Trend in Female employment in Estonia

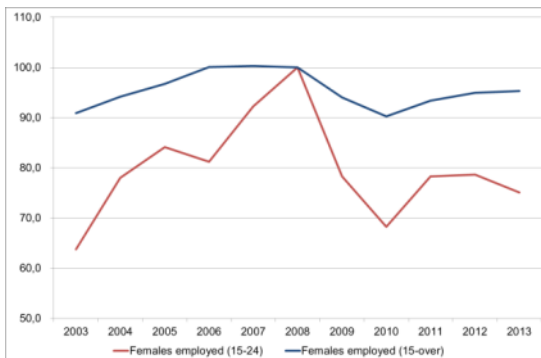
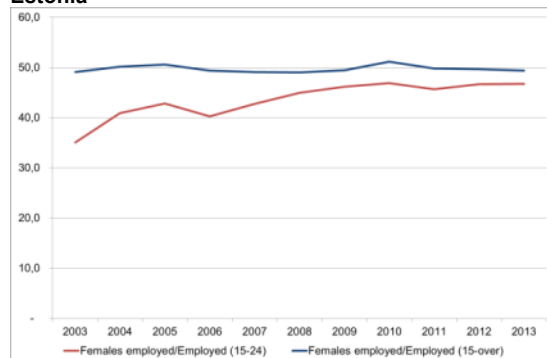


Figure 216. Female participation to labour market in Estonia



Source: Eurostat

As in many other European countries, since 2004 there has been a strong decrease in the granting of citizenship.

Also, as of 2007 the crime rate has strongly diminished, decreasing by 80% in 5 years.

Figure 217. Acquisition of Citizenship in Estonia

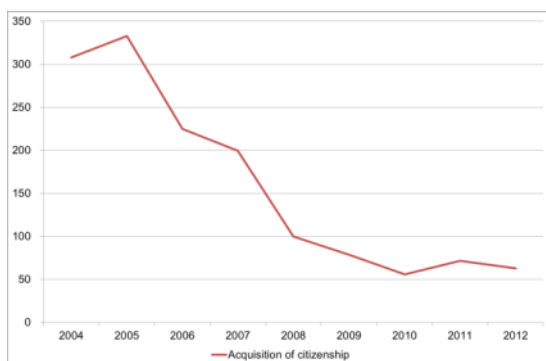
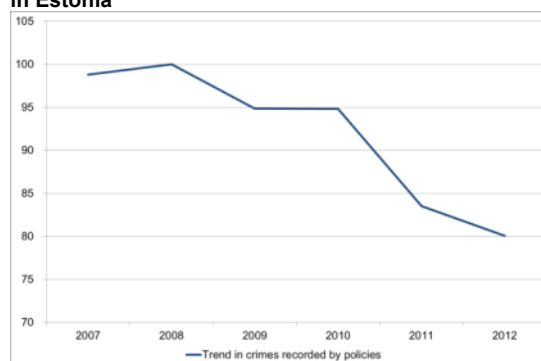


Figure 218. Trend in crimes recorded by the police in Estonia



Source: Eurostat

The number of young people at risk of poverty has increased in the last 5 years while, in the same period, the number of early school leavers has decreased.

Figure 219. Young people at risk of poverty or exclusion in Estonia

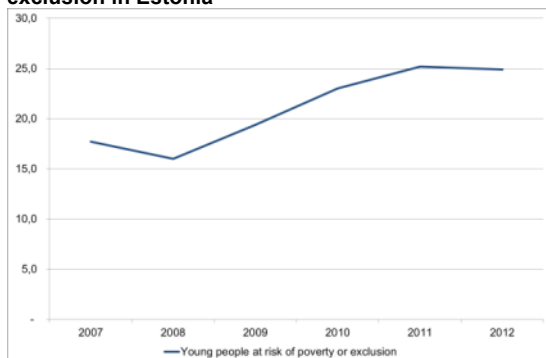
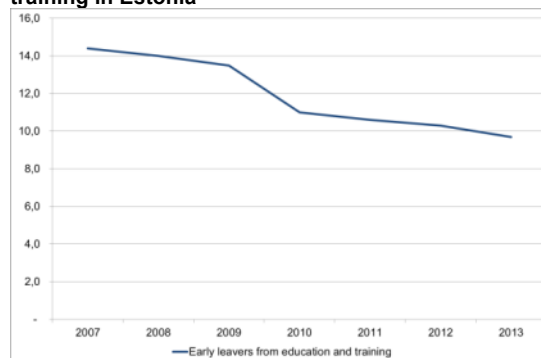


Figure 220. Early leavers from education and training in Estonia



Source: Eurostat

Estonians have a good sense of citizenship and show a high degree of participation in voluntary activities (31,1% of the adults and 28,8% of the young).

Table 22. Other trust indicators in Estonia

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		95,4
Participation in informal voluntary activities	Adult	31,1
Participation in informal voluntary activities	Young	28,8
Participation in activities of charitable organisations		2,2

Source: Eurostat

In general terms, figures allow saying that there is a strong sense of community, typical in small regions, and also a very strong sense of family and social relations.

Culture and Creativity

In 2012 the contribution of Estonian CCSs to the country's GDP was equivalent to 1,27% having decreased yearly from its 2008 peak of 1,8%.

Figure 221. Trend of GDP in CCSs in Estonia

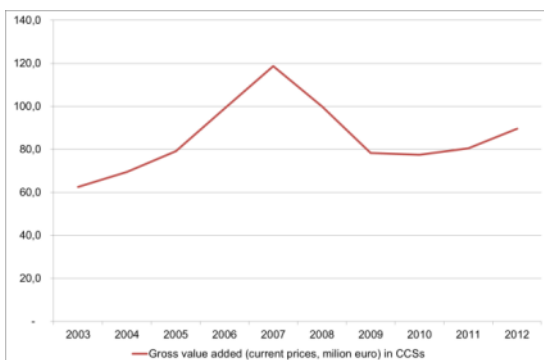
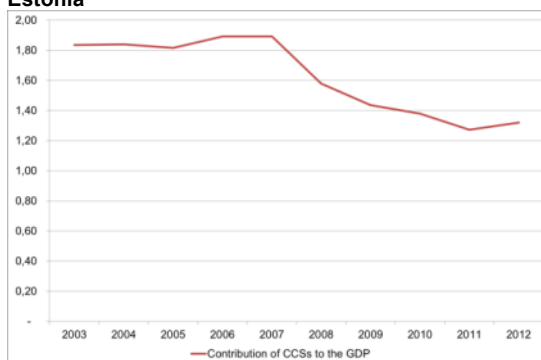


Figure 222. Contribution of CCSs to the GDP in Estonia



Source: Eurostat

The negative trend outlined above is confirmed by the charts below: public expenditure in culture registered a peak also in 2008 and has decreased since and as of 2005 the percentage of public expenditure dedicated to culture has also started a slow decline moving from 10% to 8%.

Figure 223. Trend in public expenditure in Culture in Estonia

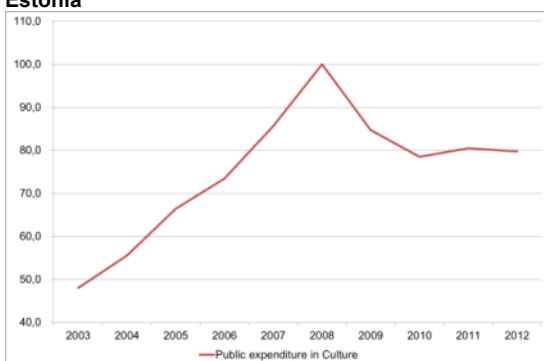
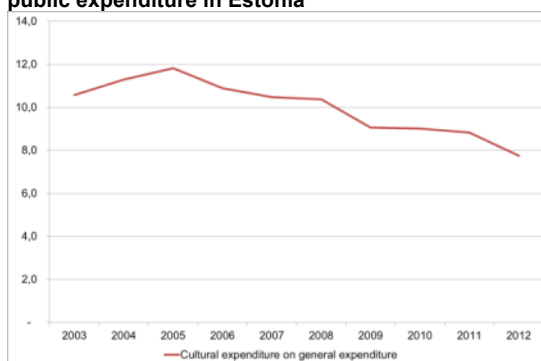


Figure 224. Public cultural expenditure on total public expenditure in Estonia



Source: Eurostat

Demand and Supply of Culture and Creativity

In relation to its the population Estonia has a high number of museums (16,59 per 100.000 inhabitants). It also has 2 UNESCO cultural sites.

Table 23. Number of UNESCO cultural sites and museums in Estonia

Description	Year	Number
UNESCO cultural sites	2013	2
Museums	2012	245

Source: Eurostat, EGMUS

Cultural behaviour is very strongly connected to cultural consumption: 34,4% of the population declares visiting cultural sites (9,7% repeat the cultural experience more than 4 times per year); 29,5% goes to the cinema (11,6% are assiduous consumers) and 53,5% attend live performances (20,5% more than 4 times). Indeed, a high percentage repeats the cultural experience more than 4 times per year.

Table 24. Cultural behaviours in Estonia

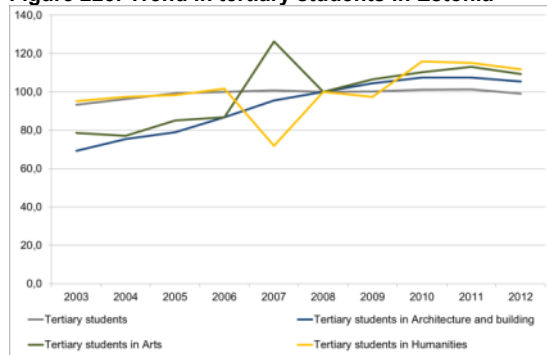
Description/times	none	1-3	4-6	7-12	more than 12
Times going to live performances	46,5	33,0	14,7	4,1	1,7
Times going to the cinema	70,5	17,9	7,1	3,4	1,1
Visits to cultural sites	65,6	24,7	6,5	2,2	1,0

Source: Eurostat

Education

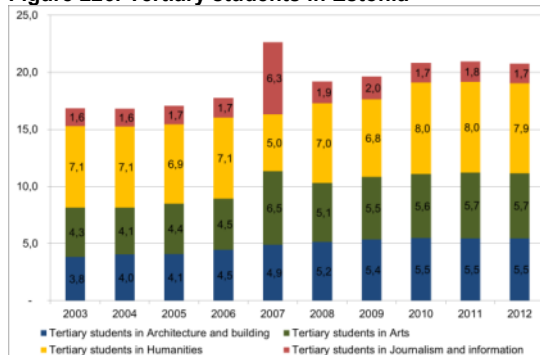
In 2012 over 20% of tertiary students chose culture-related subjects for which there seems to be a growing interest if compared to other areas of study: 7,1% of students chose the Humanities, 5,7% the Arts and 5,5% Architecture and building while 1,7% chose Journalism and information. This particular sector showed a strong increase in 2007 and has been excluded from the chart illustrating the general trend.

Figure 225. Trend in tertiary students in Estonia



Source: Eurostat

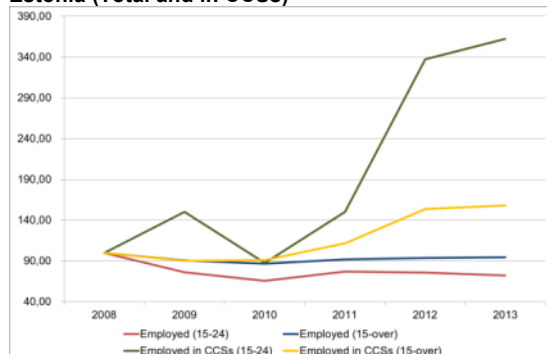
Figure 226. Tertiary students in Estonia



Employment and Young employment

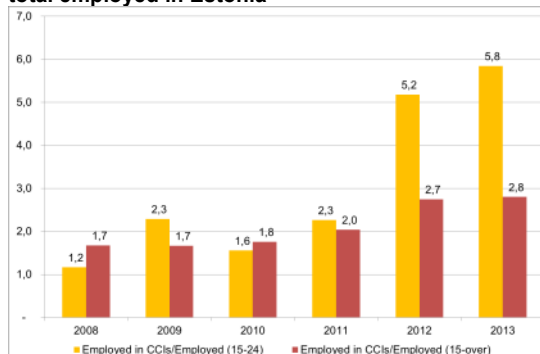
Employment in the cultural and creative sector shows a resilient trend after the crisis. From 2007 onwards and, especially for young people, there has been a strong increase of employment in this field which went from an initial 1,2% within general employment to 5,8% in 2013. Indeed, during the period analysed employment in culture registered a better performance than general employment.

Figure 227. Employment and young employment in Estonia (Total and in CCSs)



Source: Eurostat

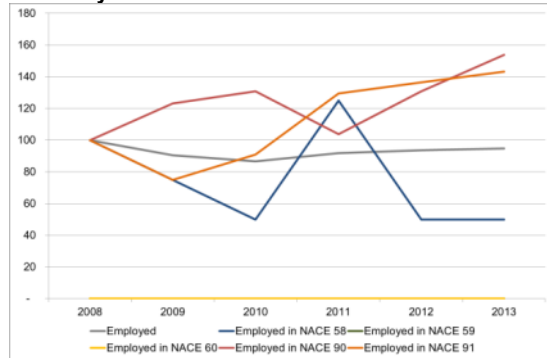
Figure 228. Composition of Employed in CCSs on total employed in Estonia



When assessing the situation per sector, and as shown by the chart that follows, information for the “Programming ad broadcasting” (NACE 60) and “Motion pictures” (NACE 58) sectors has been collected only as of 2012 and thus does not allow for any consideration being made as regards these specific sectorial trends.

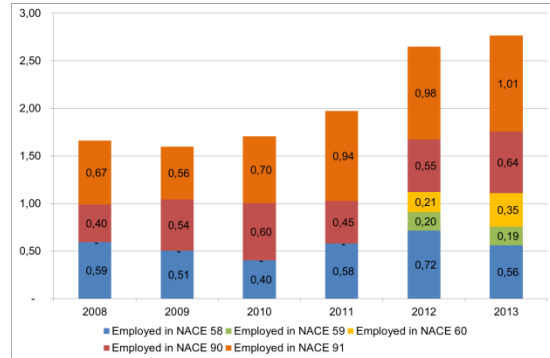
As for the other sectors “Libraries, archives and museums” (NACE 91) show a positive trend, probably due to the high number of museums in the country, and the “Creative Arts” (NACE 90) also show a good performance in the past 5 years. On the contrary, there is a negative trend for the “Publishing activities” (NACE 58) that registered a fall of over 40%, from the initial 25,8% of total employment in CCSs to the current 20,3%.

Figure 229. Trend in Employment in CCSs for sector of activity in Estonia



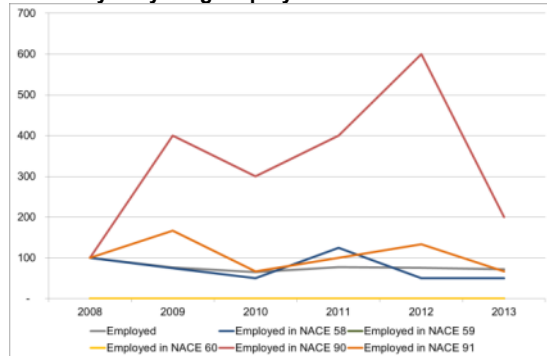
Source: Eurostat

Figure 230. Composition of employed in CCSs in Estonia



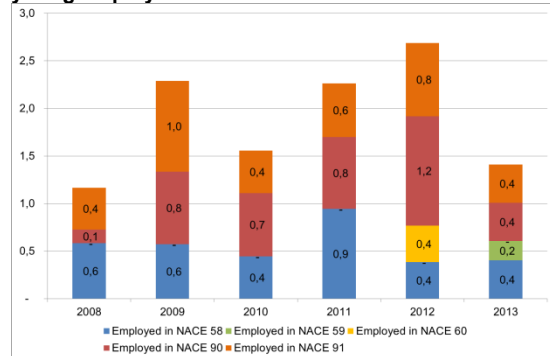
The “Creative Arts and entertainment” sector (NACE 90) register the most dynamic trend among young people as does the “Libraries archives and museums” sector (NACE 91) while a negative trend appears for the “Publishing activities” sector (NACE 58).

Figure 231. Trend in Employment in CCSs for sector of activity for young employed in Estonia



Source: Eurostat

Figure 232. Composition of employed in CCSs for young employed in Estonia



ICT

Today, 20% of Estonians use the Internet and, in 10 years, the digital divide has mostly disappeared. The trend in mobile subscriptions is very strong and, although it registered a stop the crisis, it started to grow again in 2010. Broadband has reached 26% of the population and 33% of inhabitants have fixed telephone lines.

Figure 233. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Estonia

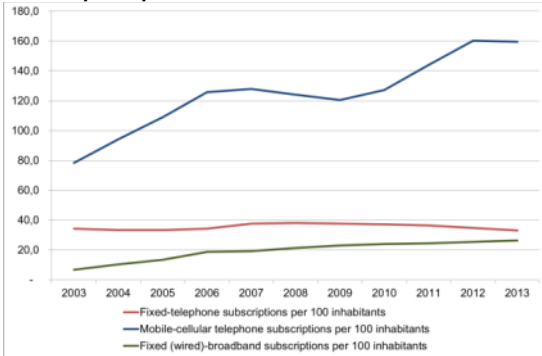
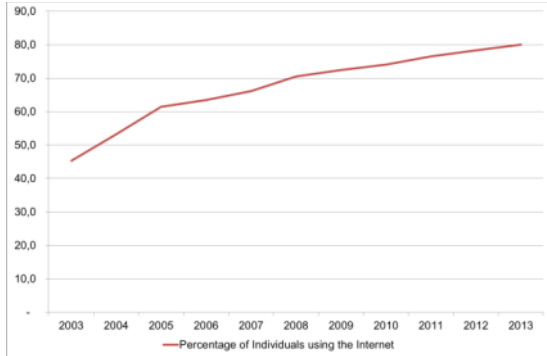


Figure 234. Percentage of Individuals using the Internet in Estonia



Source: Eurostat

In Estonia the ICT has a strong performance: the growth rate of “Computer programming” (NACE 62) and “Telecommunication” (NACE 61) is over 40% for the first and 20% for the second whereas nothing can be said about the “Information services” (NACE 63) due to the lack of data.

Figure 235. Trend in ICT Employment in Estonia

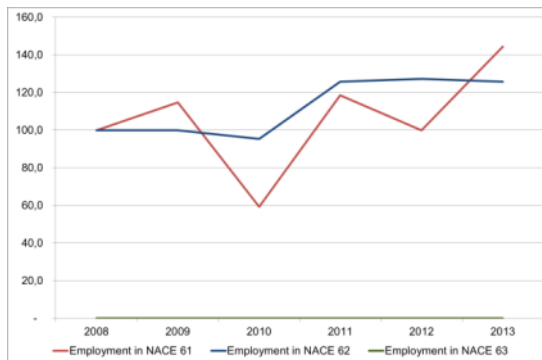
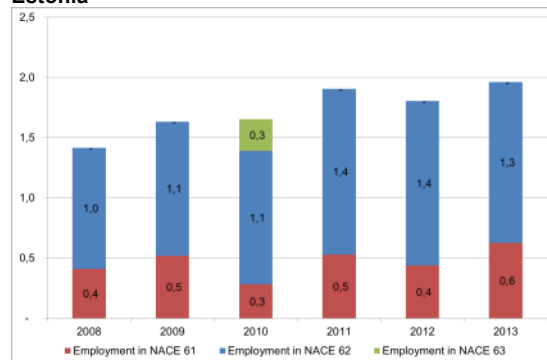


Figure 236. Composition of ICT Employment in Estonia



Source: Eurostat

FINLAND

Finland has been member of the European Union since 1995 and has a population of 5,3 million.

The demographic trend in the following charts shows that the young population grows at a slower rate than the general population. On the other hand, in the last 10 years labour force in Finland has been stable.

Figure 237. Trend in population in Finland

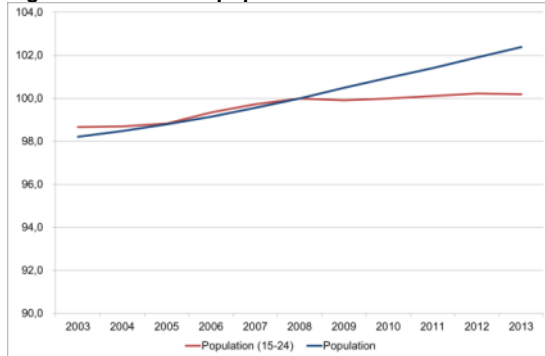
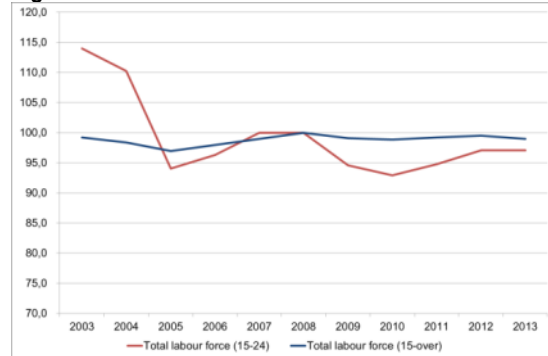


Figure 238. Trend in labour force in Finland



Source: Eurostat

As regards GDP the chart shows that the crisis had a negative effect in 2009 but that, afterwards, GDP started to grow again as early as in 2010. In the same period the Finnish economy was supported by public expenditure: this registered a constant increase during the same period.

Figure 239. Trend in GDP in Finland

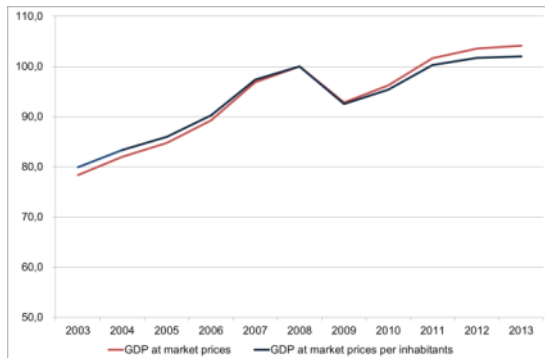
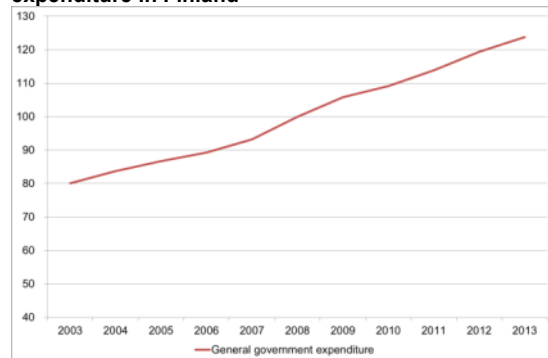


Figure 240. Trend in general government expenditure in Finland



Source: Eurostat

The crisis generated a loss of employment while self-employment partially by-passed the employed situation. A similar trend is registered among the young population.

Figure 241. Trend in employment in Finland

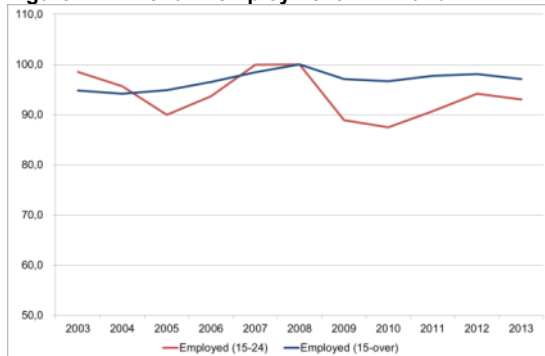
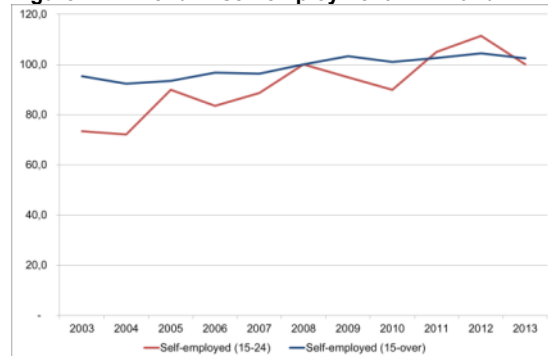


Figure 242. Trend in self-employment in Finland



Source: Eurostat

Social environment

As observed in other countries, women show a higher degree of resilience in employment: whereas general employment in Finland decreased by 5,3% women lost 4,7% over the

same period. The presence of women in the labour market is very high, on average a little under 49% and among the young it reached a peak 53% in 2013.

Figure 243. Trend in Female employment in Finland

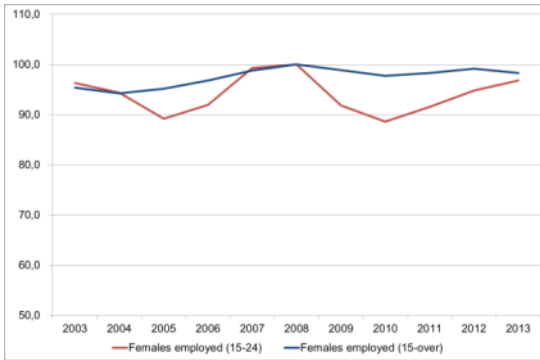
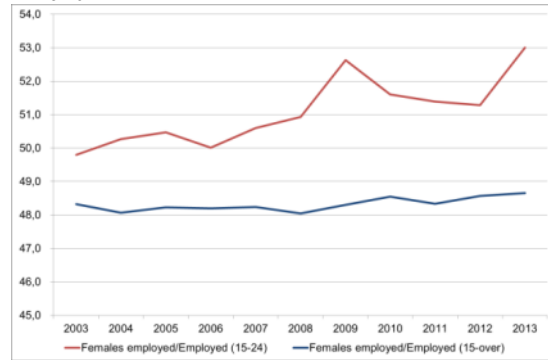


Figure 244. Female participation to labour market in Finland



Source: Eurostat

The Finnish society seems to have a good indicator of tolerance towards new citizens, and the crime rate has been stable throughout the last 5 years.

Figure 245. Acquisition of Citizenship in Finland

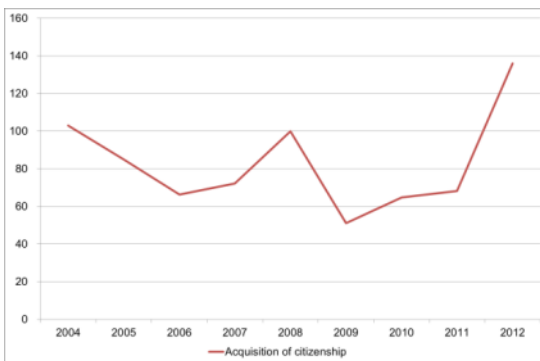
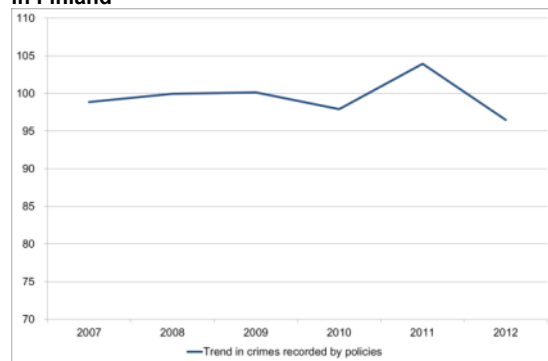


Figure 246. Trend in crimes recorded by the police in Finland



Source: Eurostat

As regards indicators of poverty risk for the young and social inclusion in the last 2 or 3 years there have been encouraging results.

Figure 247. Young people at risk of poverty or exclusion in Finland

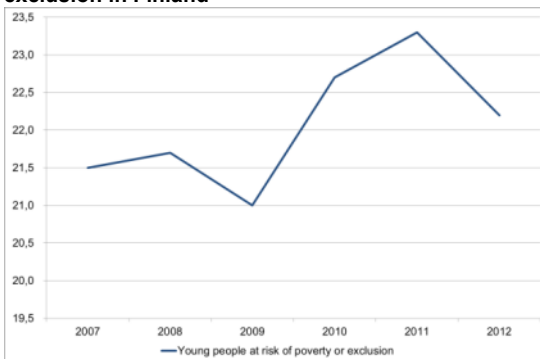
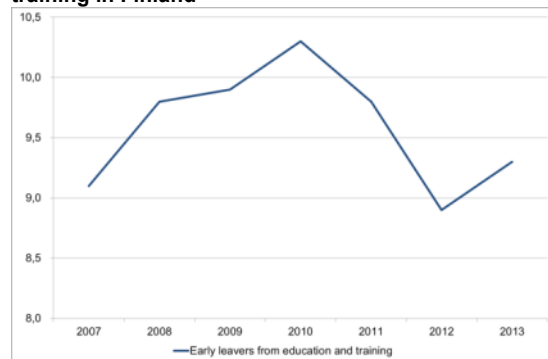


Figure 248. Early leavers from education and training in Finland



Source: Eurostat

Trust and family networks are highly valued by Finnish society.

Table 25. Other trust indicators in Finland

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		94,7
Participation in informal voluntary activities	Adult	38,3
Participation in informal voluntary activities	Young	34,7
Participation in activities of charitable organisations		12,3

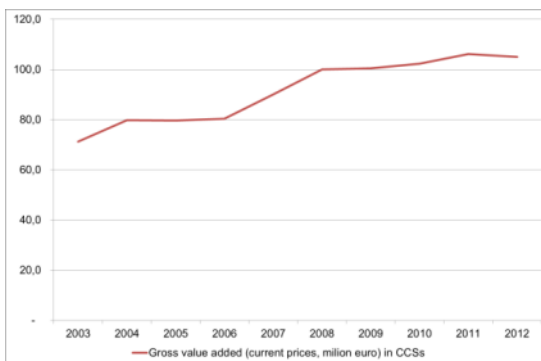
Source: Eurostat

Generally, Finland has developed a good environment for creativity.

Culture and Creativity

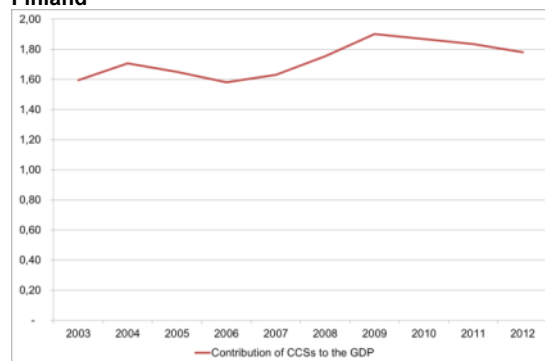
The following charts show the trend in CCSs GDP and their contribution to the total GDP: in Finland the CCSs have contributed to economic recovery more than in other countries. In 2012 the total contribution of CCSs GDP to the economy was 1,8%, confirming the slight negative trend initiated in 2009.

Figure 249. Trend of GDP in CCSs in Finland



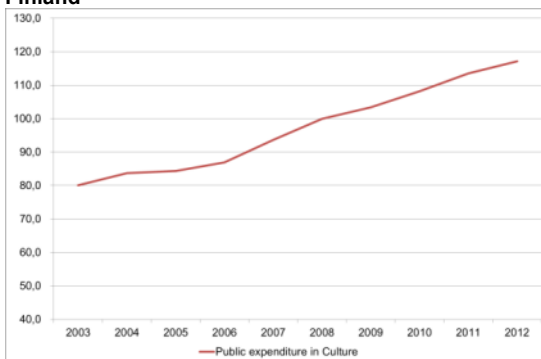
Source: Eurostat

Figure 250. Contribution of CCSs to the GDP in Finland



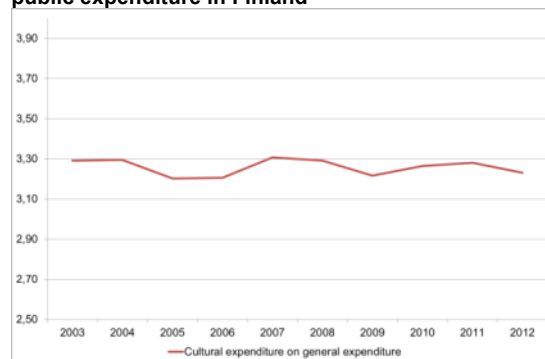
Cultural expenditure is stable in the country: in terms of trend, it is actually growing more than the GDP but in terms of percentage it is stable fluctuating from 3,2% to 3,3% of the general public expenditure.

Figure 251. Trend in public expenditure in Culture in Finland



Source: Eurostat

Figure 252. Public cultural expenditure on total public expenditure in Finland



Demand and Supply of Culture and Creativity

The cultural behaviour of the Finnish is described by the following data. As regards supply, the indicators show that Finland has 6 UNESCO cultural sites and 325 museums (5,34 per 100.000 inhabitants).

Table 26. Number of UNESCO cultural sites in Finland

Description	Year	Number
UNESCO cultural sites	2013	6
Museums	2012	325

Source: Eurostat, EGMUS

As regards demand, the Finnish are strong cultural consumers: 59,8% visit cultural sites and the majority more than 4 times per year; 47,1% go to the cinema (18,4% more than 4 times) and 49% attend live performances (26,3% more than 4 times per year).

Table 27. Cultural behaviours in Finland

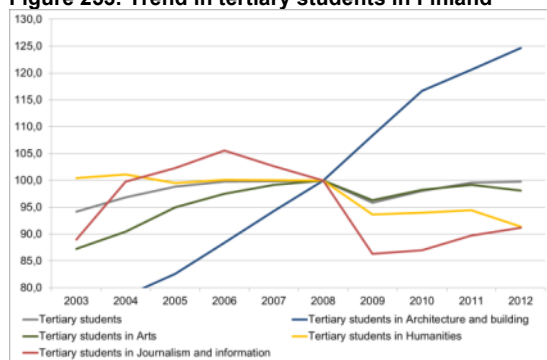
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	41,0	32,8	14,1	6,7	5,3
Times going to the cinema	52,9	28,7	11,3	4,1	3,0
Visits to cultural sites	40,2	28,0	13,2	8,6	10,0

Source: Eurostat

Education

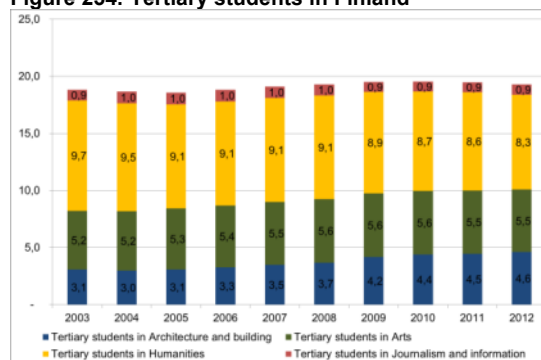
Less than 20% of students decide to study cultural-related subjects: 8,3% of them study Humanities; 5,5% Arts; 4,6% Architecture and building; 0,9% Journalism and information. While for students in the Arts the trend is similar to the average, Architects register a strong growth in the last 10 years.

Figure 253. Trend in tertiary students in Finland



Source: Eurostat

Figure 254. Tertiary students in Finland



Employment and Young employment

The following chart shows that jobs in the CCSs are resilient both for adults and young people. Employment in the creative economy has grown faster than the general economy: in 2013 it represented 4,1% of the total young people employed and 2,4% of the total employed.

Figure 255. Employment and young employment in Finland (Total and in CCSs)

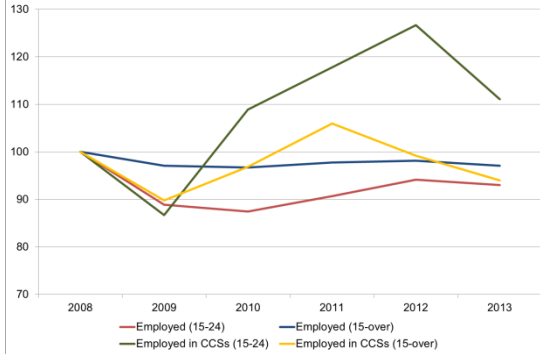
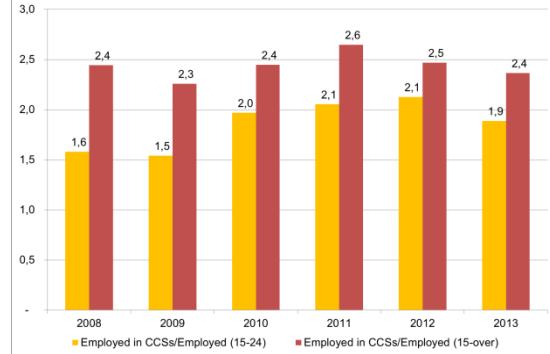


Figure 256. Composition of Employed in CCSs on total employed in Finland



Source: Eurostat

The only exception is represented by the “Motion pictures” sector (NACE 59) that registered a negative trend in the last 4 years. For the other sectors growth rates and dynamics are indeed stronger than the average.

The sectors that are the most representative are the “Creative arts and entertainment” sector (NACE 90) which accounts for 36% of those employed in CCSs and the “Publishing activities” sector (NACE 58) which accounts for 29,% of the total employed in the CCSs.

Figure 257. Trend in Employment in CCSs for sector of activity in Finland

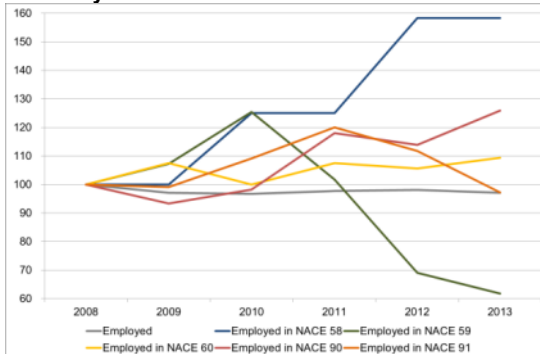
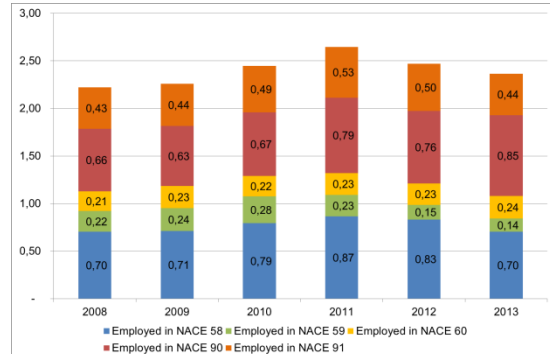


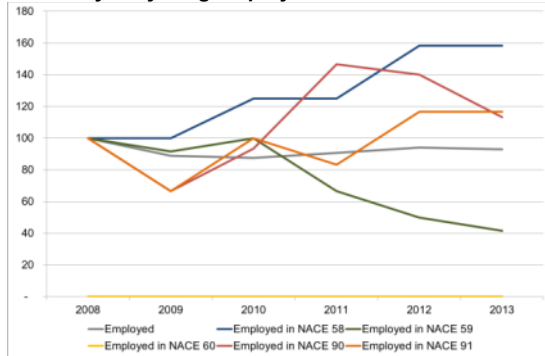
Figure 258. Composition of employed in CCSs in Finland



Source: Eurostat

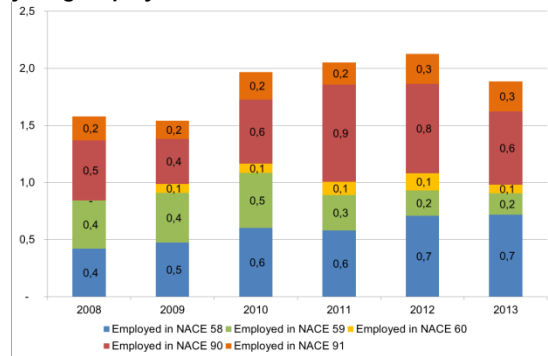
Similar considerations can be done as regards the young employed in the CCSs although for those employed in the “Motion pictures” (NACE 59) sector there has been a negative trend, albeit with a good number of members.

Figure 259. Trend in Employment in CCSs for sector of activity for young employed in Finland



Source: Eurostat

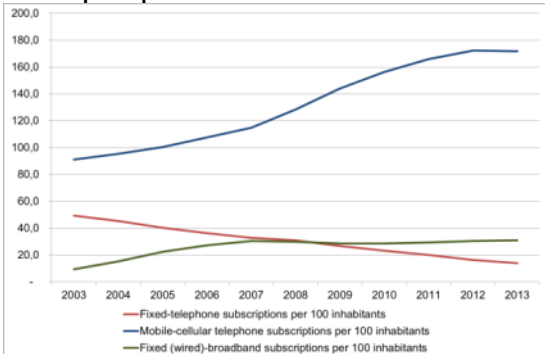
Figure 260. Composition of employed in CCSs for young employed in Finland



ICT

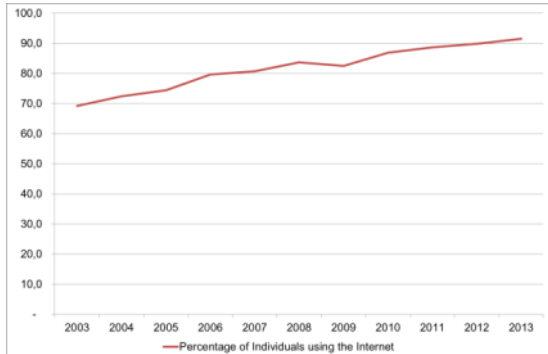
ICTs are very developed in Finland: 90% of the population uses the Internet and 35% has access to broadband; as regards mobile subscriptions, the trend in the last 10 years has been of a very high growth rate. The negative trend for fixed telephone subscriptions confirms the general trend for the ICTs.

Figure 261. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Finland



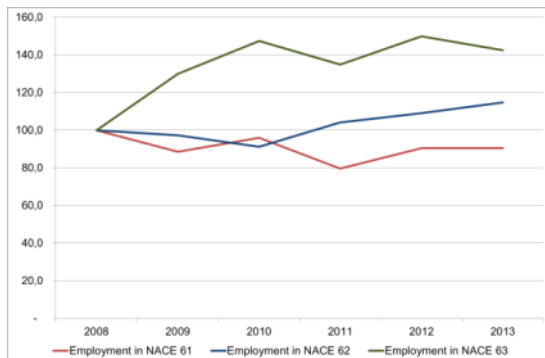
Source: Eurostat

Figure 262. Percentage of Individuals using the Internet in Finland



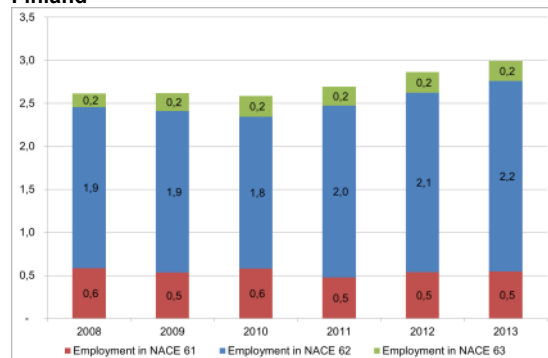
The charts below show that the only sector that suffers from the crisis is the “Telecommunication” sector (NACE 61) while “Computer programming” (NACE 62) is the most important sector both numerically and as regards the general trend.

Figure 263. Trend in ICT Employment in Finland



Source: Eurostat

Figure 264. Composition of ICT Employment in Finland



FRANCE

France was one of the founding members of the European Union in 1952. In 2013 it had a population of 64,3 million.

The population growth rate and the trend in labour force are displayed in the charts below: in the last 10 years the population has increased a 5,3% and a similar trend is registered for labour force. As regards the young population the trend is the one common for this type of “mature” country in which the birth rate is very low.

Figure 265. Trend in population in France

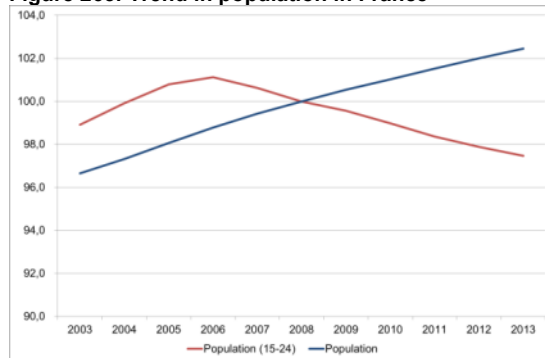
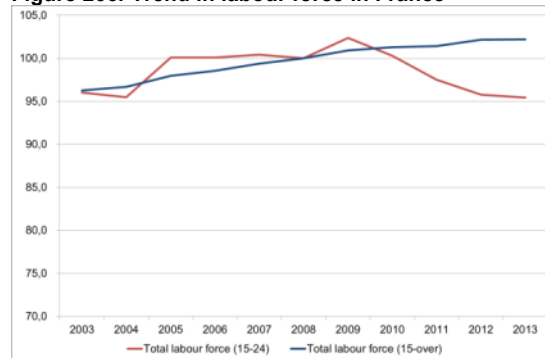


Figure 266. Trend in labour force in France



Source: Eurostat

After 2007 the financial crisis had a two-year depression effect and, only in 2009, GDP started to grow again. The general government expenditure in the period shows a constant growth.

Figure 267. Trend in GDP in France

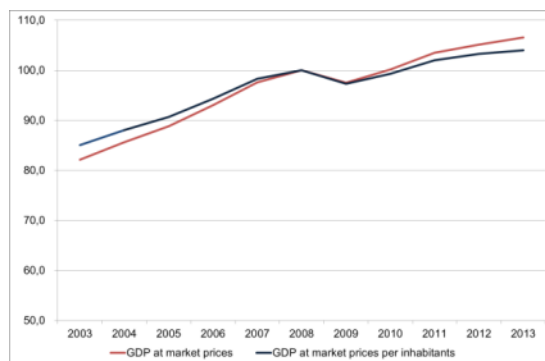
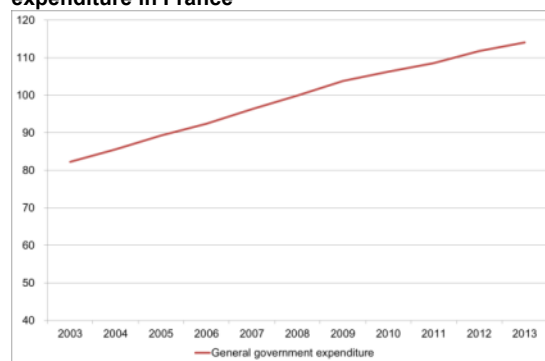


Figure 268. Trend in general government expenditure in France



Source: Eurostat

Whereas the employment rate remains stable after the 2007, the self-employment rate indicates a slight growth, both for adults and young people.

Figure 269. Trend in employment in France

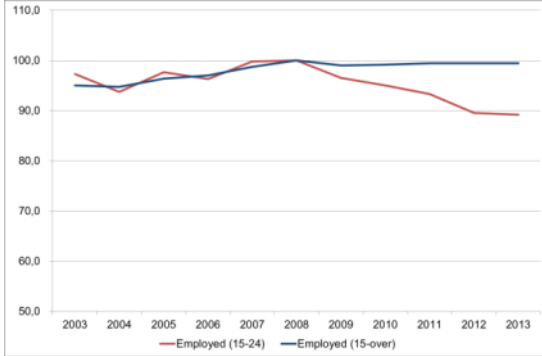
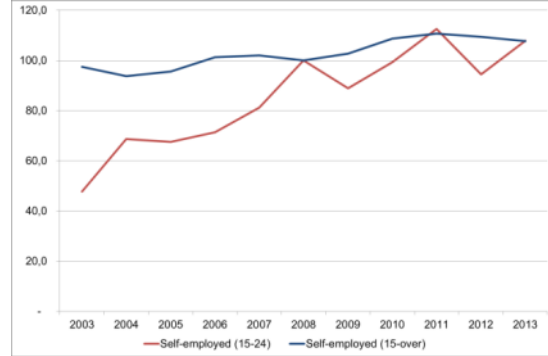


Figure 270. Trend in self-employment in France



Source: Eurostat

Social environment

The women employed have had a better reaction to the crisis and the result has been a trend with a balancing effect as regards gender representation in the labour market. In 2013, about 48% of the employed were women, growing from 46% in 2003. A similar trend is registered also as regards the young population in the labour force.

Figure 271. Trend in Female employment in France

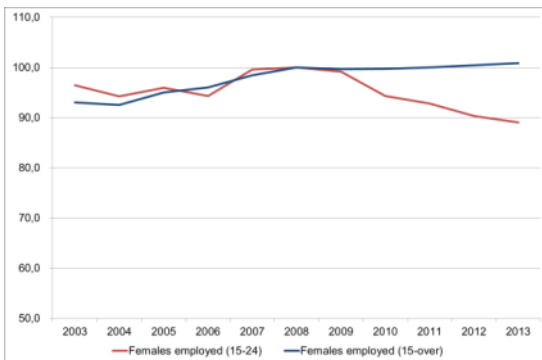
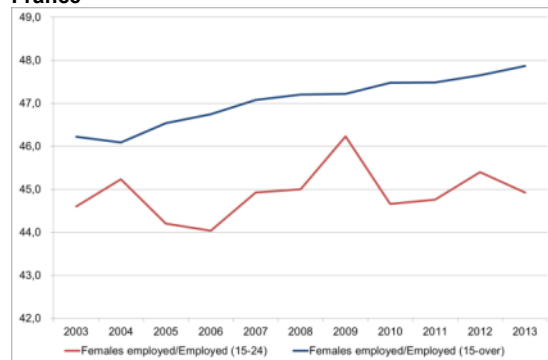


Figure 272. Female participation to labour market in France



Source: Eurostat

In the last 10 years there have been profound changes as regards social cohesion and general trust: on the one hand the trend in the acquisition of new citizenship has decreased decreasing (Figure 273), the young population at risk of poverty has increased (Figure 275).

Figure 273. Acquisition of Citizenship in France

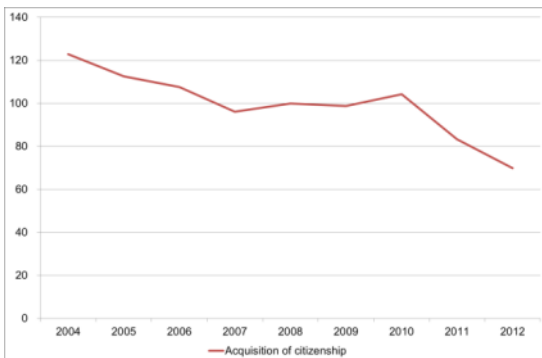
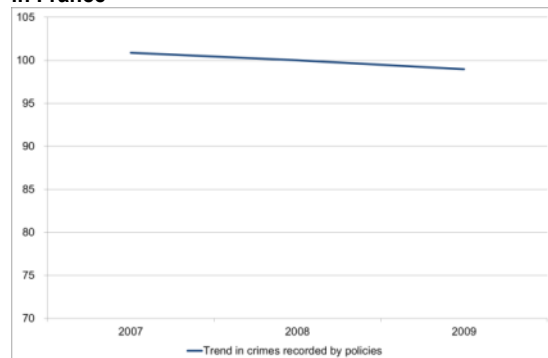


Figure 274. Trend in crimes recorded by the police in France



Source: Eurostat

Otherwise, a positive trend appears in the crime rate but also as regards early school leavers: both rates have decreased in the last 5 years.

Figure 275. Young people at risk of poverty or exclusion in France

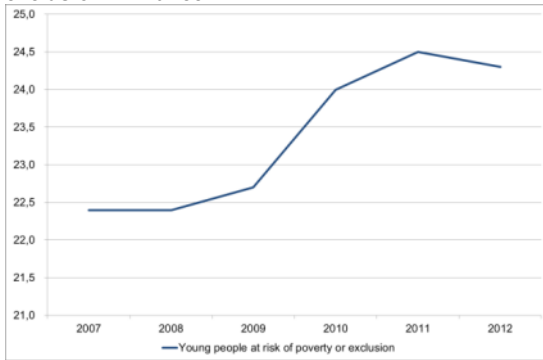
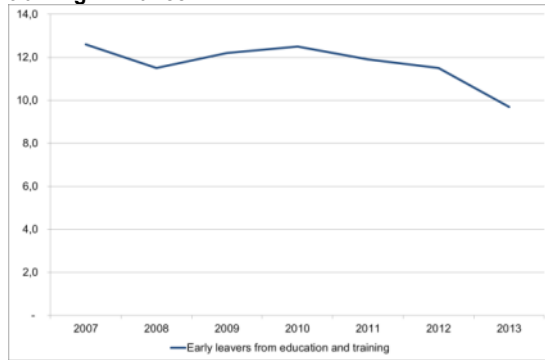


Figure 276. Early leavers from education and training in France



Source: Eurostat

The degree of participation in social life is shown in the table below: both adult and young citizens are active but only 1,5% participate in charitable activities.

Table 28. Other trust indicators in France

Description	Age	2006
Participation in informal voluntary activities	Adult	17,4
Participation in informal voluntary activities	Young	14,2
Participation in activities of charitable organisations		1,5

Source: Eurostat

Culture and Creativity

As regards culture and creativity the trend in France is not a positive one: on the one hand the trend of GDP in CCSs has registered a slow growth in the last 10 years; on the other, the contribution of CCSs to GDP has fallen from 1,87% to 1,73%.

Figure 277. Trend of GDP in CCSs in France

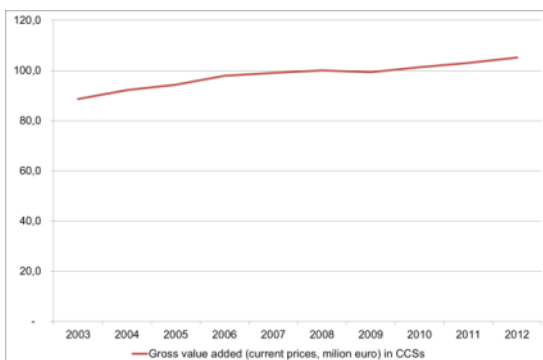
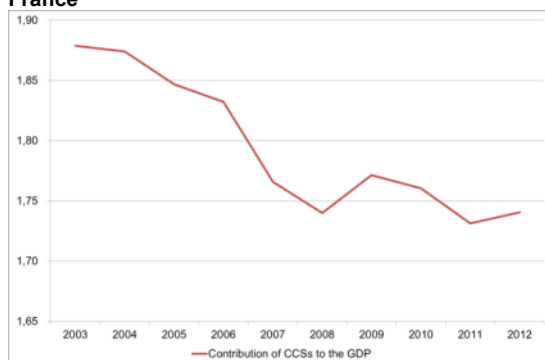


Figure 278. Contribution of CCSs to the GDP in France



Source: Eurostat

Public government expenditure in culture has stalled since 2008, representing 4,1% of general expenditure.

Figure 279. Trend in public expenditure in Culture in France

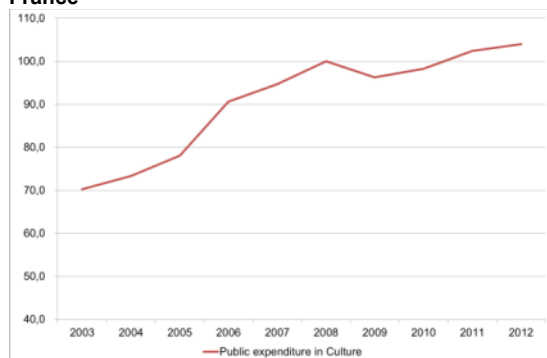
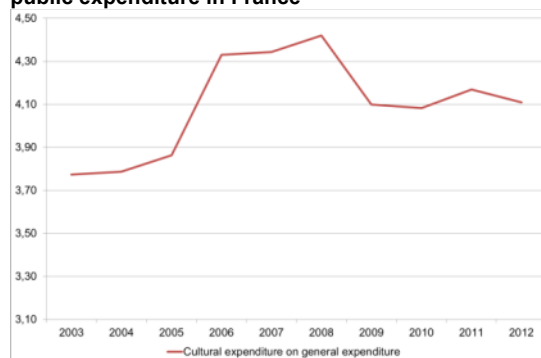


Figure 280. Public cultural expenditure on total public expenditure in France



Source: Eurostat

Demand and Supply of Culture and Creativity

The two indicators for cultural supply show that in France there are 36 UNESCO cultural sites and 1.173 museums (1,6 per 100.000 inhabitants).

Table 29. Number of UNESCO cultural sites and museums in France

Description	Year	Number
UNESCO cultural sites	2013	36
Museums	2010	1.173

Source: Eurostat, EGMUS

Participation in cultural life is high: 44,3% of people declare they visit cultural sites (17,6% more than 4 times per year); 51,7% go to the cinema (27,9% more than 4 times a year) and 46,4% attend live performances (15,5% more than 4 times per year).

Table 30. Cultural behaviours in France

Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	53,6	31,9	9,0	3,5	2,0
Times going to the cinema	48,7	23,4	13,1	8,9	5,9
Visits to cultural sites	55,7	26,7	11,1	4,2	2,3

Source: Eurostat

Education

The portion of students that attend tertiary education in culture-related subjects has diminished in the past 6 years. The negative trend is driven by the fall of students in the Humanities that go from an initial 12,1% in 2006 to a final 9,1% in 2013.

A different trend is visible for students in Architecture and building (2,4% of the total student population in 2013) and in Journalism and information (1,6% in 2013). A trend in line with the national trend is registered by students in the Arts who represent 4,2% of the total student population.

Figure 281. Trend in tertiary students in France

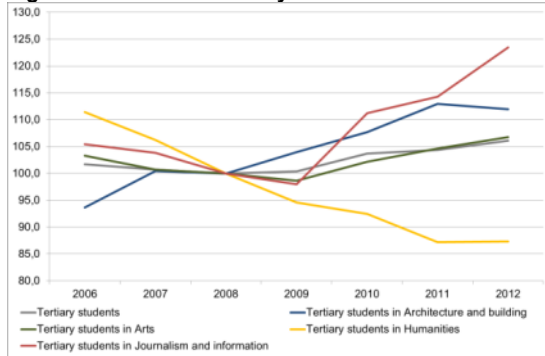
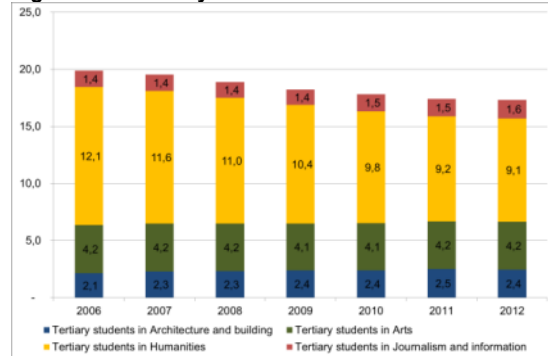


Figure 282. Tertiary students in France



Source: Eurostat

Employment and Young employment

The following chart shows that in France the employed in the CCSs are 1,8% of the total employed (2,9% of young people) and that the general trend of employment in the CCSs is positive. Indeed, those employed in the CCSs have a better performance both for adults and young.

Figure 283. Employment and young employment in France (Total and in CCSs)

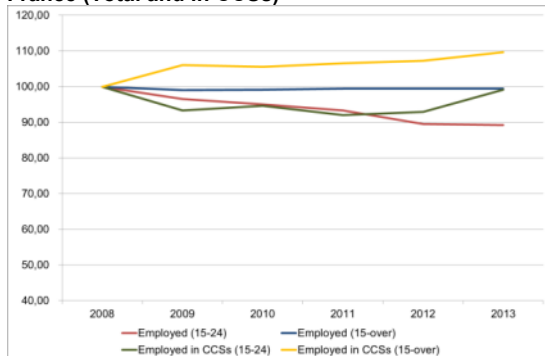
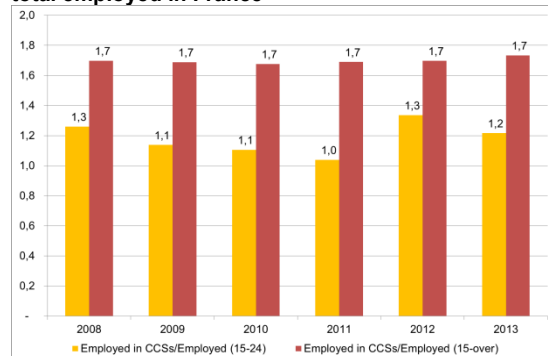


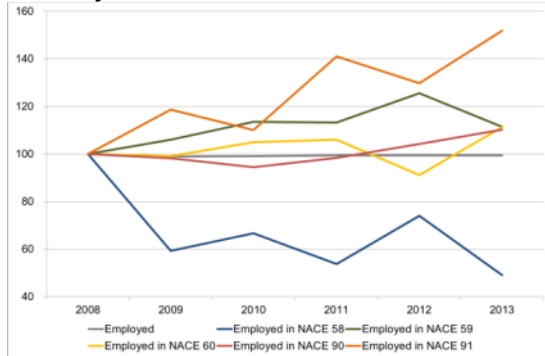
Figure 284. Composition of Employed in CCSs on total employed in France



Source: Eurostat

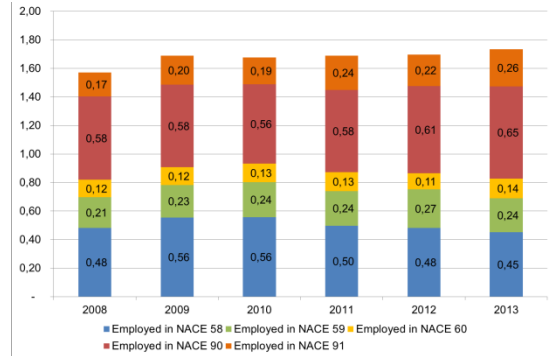
The following graphs show that, in the last 6 years, only the “Publishing activities” sector (NACE 58) has lost employment while all the other sectors show better performances as related to the general trend. Particularly significant is the growth rate in “Libraries, archives and museums” sector (NACE 91) while among the other sectors the trend shows a moderate growth. In 2013 the majority of the employed in the CCSs works in the “Creative arts and entertainment” sector (NACE 90) and in the “Publishing activities” (NACE 58) with 37,3% and 26% respectively.

Figure 285. Trend in Employment in CCSs for sector of activity in France



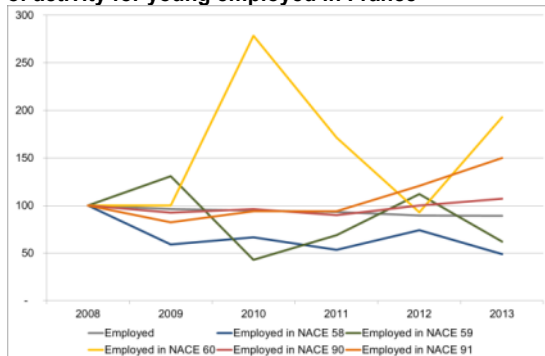
Source: Eurostat

Figure 286. Composition of employed in CCSs in France



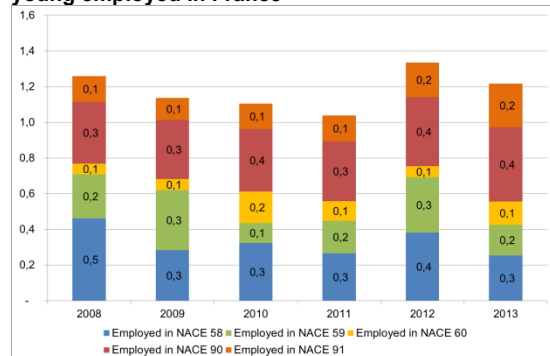
Data for young people does not have the same reliability; however, the following charts show that the trend in the CCSs is, in many cases, better than the general trend.

Figure 287. Trend in Employment in CCSs for sector of activity for young employed in France



Source: Eurostat

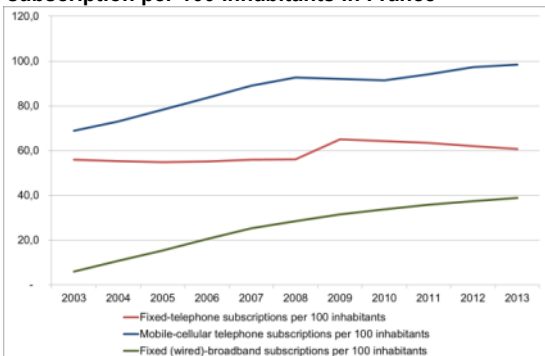
Figure 288. Composition of employed in CCSs for young employed in France



ICT

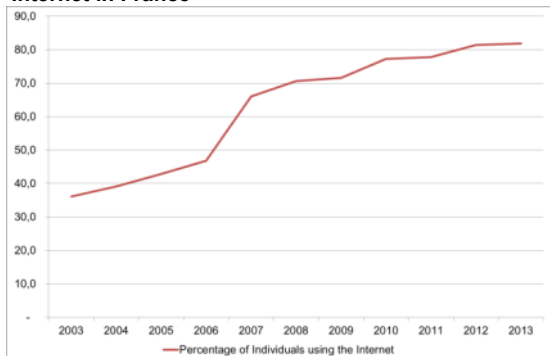
Over 80% of the French population uses the Internet and almost every person owns a mobile device; 60% of the French have a fixed telephone line and the broadband reaches about 40% of the population.

Figure 289. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in France



Source: Eurostat

Figure 290. Percentage of Individuals using the Internet in France



Like in many other countries the "Telecommunication" (NACE 61) sector is losing jobs while in other ICT sectors the trend is otherwise positive: indeed, the "Computer programming" sector (NACE 62) accounts for 65,3% of the total employed in the ICTs and the "Information services" sector (NACE 63), after a period of growth from 2009 to 2012, has a trend in line with the general economy.

Figure 291. Trend in ICT Employment in France

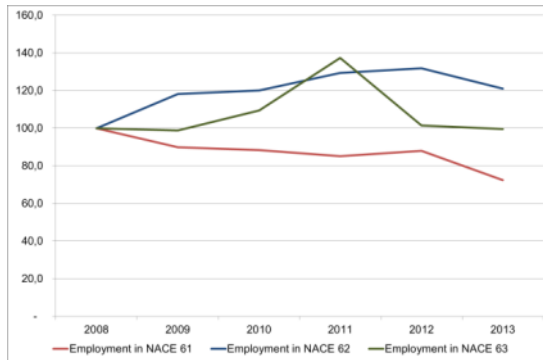
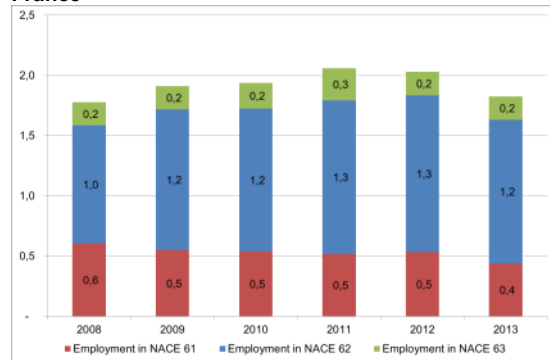


Figure 292. Composition of ICT Employment in France



Source: Eurostat

GERMANY

Germany France was one of the founding members of the European Union. In 2013 it had a population of 82 million.

The demographic trend shown in the following charts indicates that there is a progressive ageing of population. Labour force shows a slight decreasing trend and, among the young population, it is clearly falling at a higher rate.

Figure 293. Trend in population in Germany

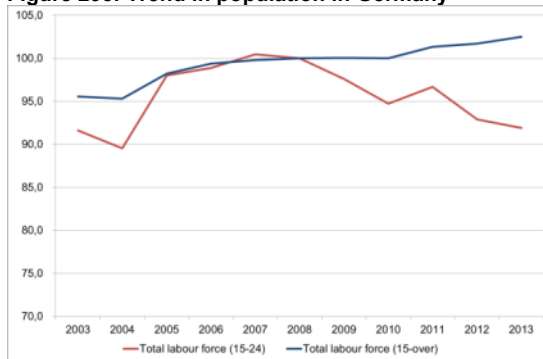
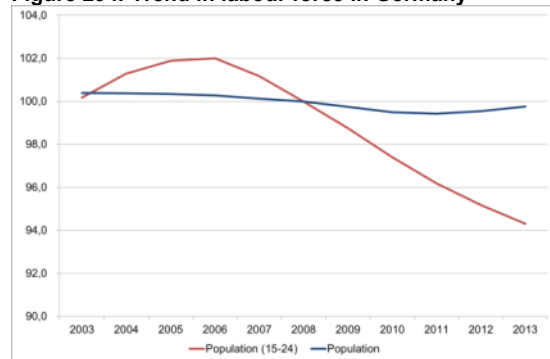


Figure 294. Trend in labour force in Germany



Source: Eurostat

Despite the crisis, Germany's trend as regards its GDP is strongly increasing and general expenditure has registered a stable growth rate, albeit with a pause between 2010 and 2013.

Figure 295. Trend in GDP in Germany

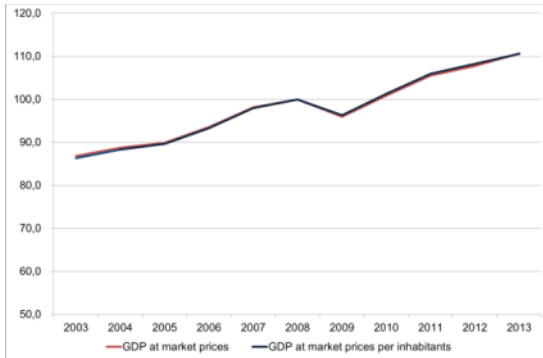
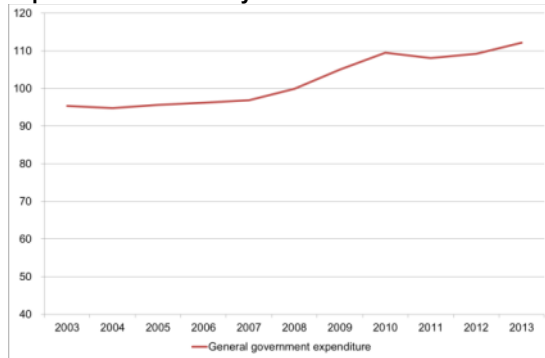


Figure 296. Trend in general government expenditure in Germany



Source: Eurostat

In the last years Germans have registered a positive trend as regards both employment and self-employment; the trend in young employment can be explained by the corresponding decrease of the young labour force.

Figure 297. Trend in employment in Germany

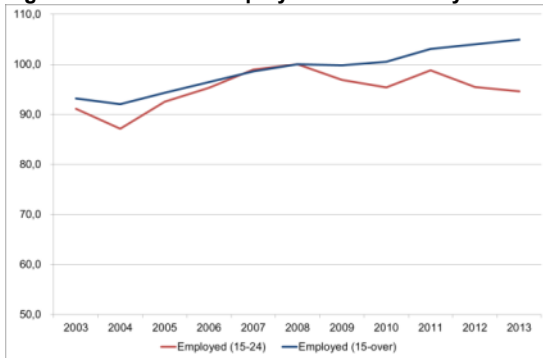
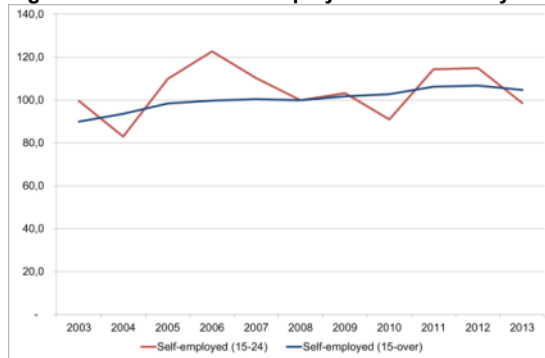


Figure 298. Trend in self-employment in Germany



Source: Eurostat

Social environment

Like in many other European countries, the employment trend as regards women has proven more resilient: in Germany, employment rate for women has risen by 7% since 2008 and the composition of the work force has changed favouring women's participation who, in 2013, accounted for 46,3% of the total employed from an initial 45% in 2003.

Figure 299. Trend in Female employment in Germany

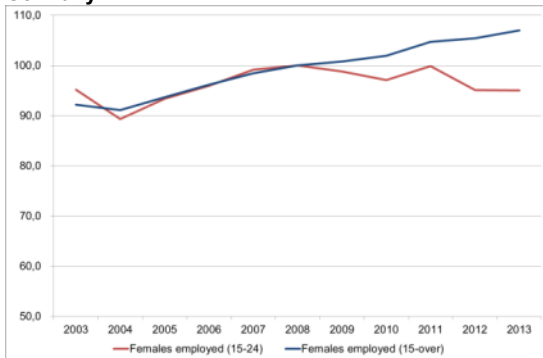
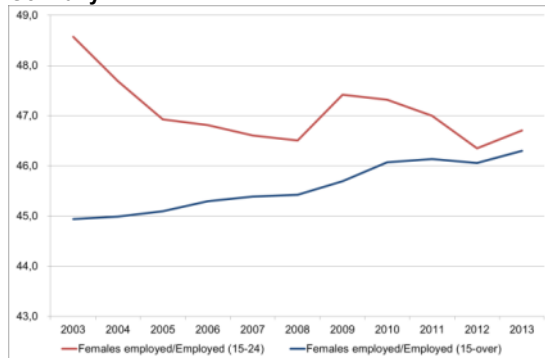


Figure 300. Female participation to labour market in Germany



Source: Eurostat

To measure trust in German society the following data shows that German citizenship policy is indeed quite open: in 2012 it was at the same level as in 2007. As regards the crime rate it has decreased from 2007 to 7,3 crimes every 100 inhabitants in 2013.

Figure 301. Acquisition of Citizenship in Germany

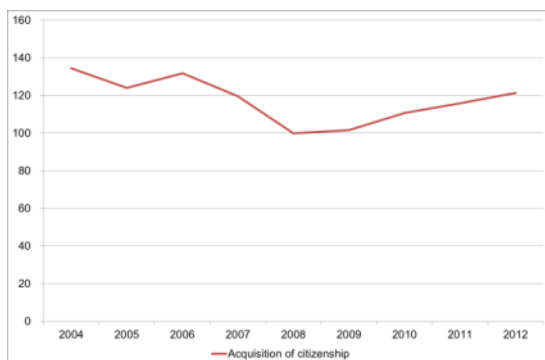
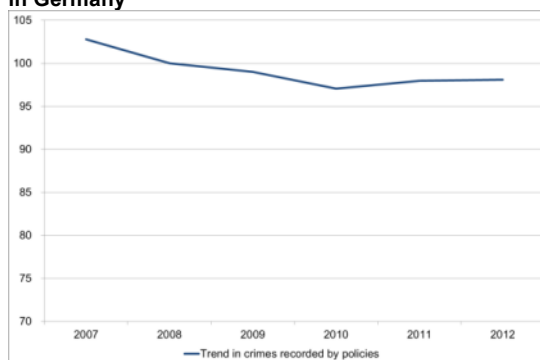


Figure 302. Trend in crimes recorded by the police in Germany



Source: Eurostat

The risk of exclusion of young people has considerably diminished except for the last two years and is currently at 25,4%. Since 2007 the number of early school leavers has decreased going from 12% to 10%.

Figure 303. Young people at risk of poverty or exclusion in Germany

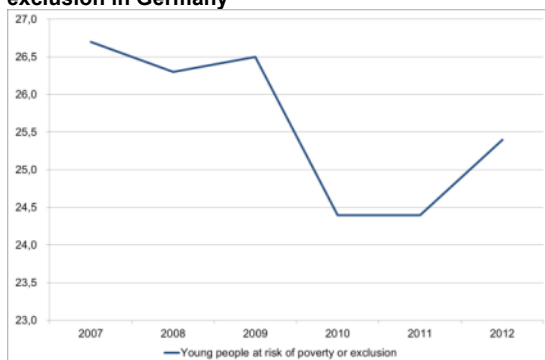
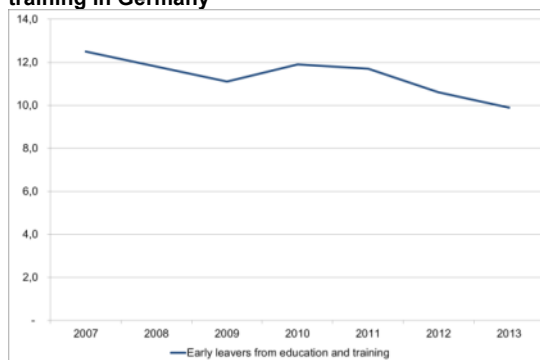


Figure 304. Early leavers from education and training in Germany



Source: Eurostat

94,7% of Germans have strong family ties and the table below shows that both adults and young people are not only active in voluntary activities but also participate in charitable organizations.

Table 31. Other trust indicators in Germany

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		94,7
Participation in informal voluntary activities	Adult	37,4
Participation in informal voluntary activities	Young	31,9
Participation in activities of charitable organisations		6,1

Source: Eurostat

Indeed, the data shows that there is a good level of trust between people and this because of the strong family ties and also the high level of participation in social activities.

Culture and Creativity

The CCSs in Germany have grown less than the general economy and, especially, from 2009 have registered a halt as regards their contribution to the general economy. In 2013 the CCSs contributed 1,92% to national GDP from an initial 2,09% in 2009 but, in any case, the figure for 2013 is indeed higher than the one registered for 2003.

Figure 305. Trend of GDP in CCSs in Germany

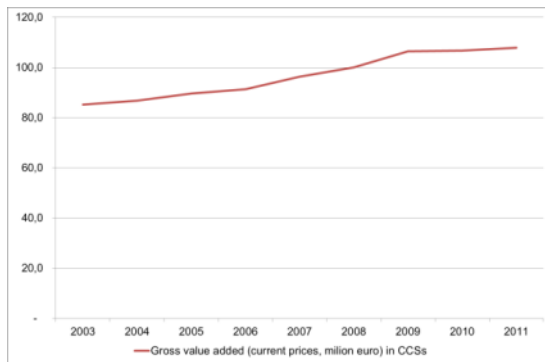
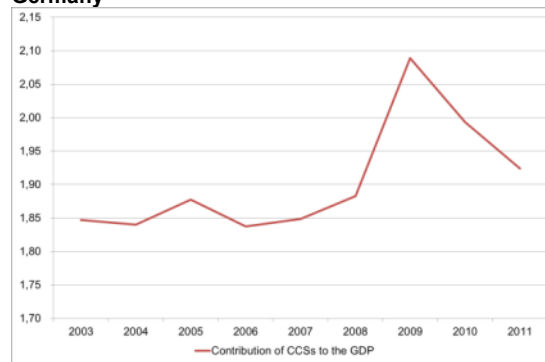


Figure 306. Contribution of CCSs to the GDP in Germany



Source: Eurostat

Public expenditure in culture has followed a fluctuating trend reaching a positive peak in 2007 (2,85% of public expenditure) and a negative peak in 2010 (2,63%). In 2013 it reached the same levels of 2007 meaning that, in general it has been stable throughout this period: peaks have probably been the results of specific events.

Figure 307. Trend in public expenditure in Culture in Germany

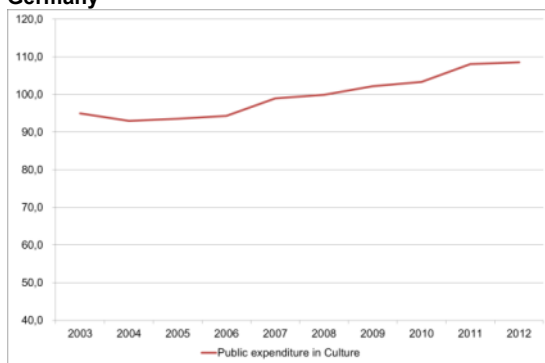


Figure 308. Public cultural expenditure on total public expenditure in Germany



Source: Eurostat

Demand and Supply of Culture and Creativity

Germany has 36 UNESCO cultural sites and 6.355 museums (7,5 museums every 1.000 inhabitants).

Table 32. Number of UNESCO cultural sites and museums in Germany

Description	Year	Number
UNESCO cultural sites	2013	36
Museums	2012	6.355

Source: Eurostat, EGMUS

Participation in cultural life is very high: 59,1% of Germans visit cultural sites (16,1% more than 4 times per year); 52,1% go to the cinema (18,4% more than 4 times per year) and 52,7% attend live performances (14,8% more than 4 times per year).

Table 33. Cultural behaviours in Germany

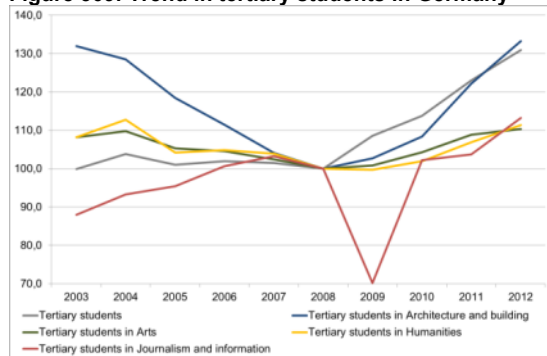
Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	47,3	38,0	9,6	3,8	1,4
Times going to the cinema	47,9	33,7	11,9	4,5	2,0
Visits to cultural sites	40,9	43,1	11,7	3,4	1,0

Source: Eurostat

Education

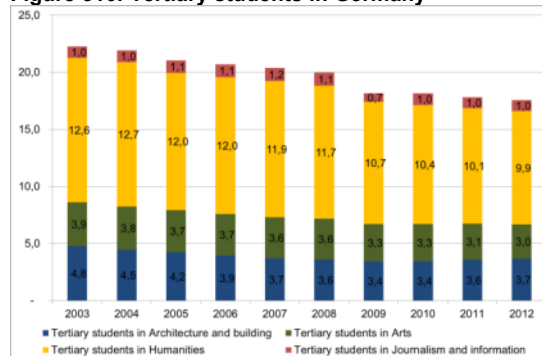
In the last 10 years the number of students enrolled in culture-related studies has decreased. In the last years only the students in Architecture and building have, after a period of decrease, registered a new growth: they now represent 3,7% of the student population in tertiary education. The general trend in CCSs subjects is positive but still inferior to the total trend. Students in the Humanities account for 9,9% of the total student population, those in the Arts for 3% and those in Journalism and Information only for 1%.

Figure 309. Trend in tertiary students in Germany



Source: Eurostat

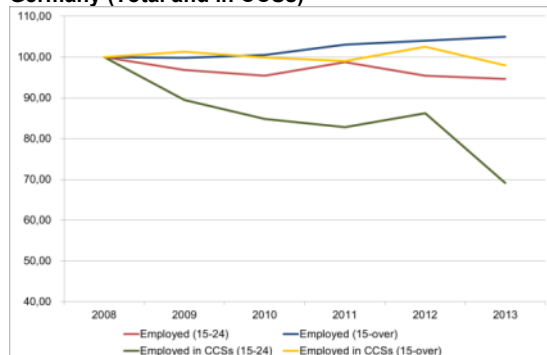
Figure 310. Tertiary students in Germany



Employment and Young employment

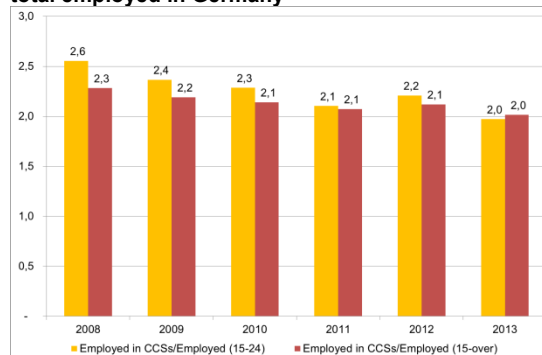
The employment situation in the CCSs follows a negative trend: from an initial 2,2% of total employment in 2008 figures have gone down to a registered 2% in 2013. This is particularly true for young people who have gone from an initial 4% to 2,9%. Employment in the CCSs has increased a slower rate than the general trend and, in the last years, it has decreased significantly.

Figure 311. Employment and young employment in Germany (Total and in CCSs)



Source: Eurostat

Figure 312. Composition of Employed in CCSs on total employed in Germany



The analysis of sectorial data shows that the driving sectors are the “Creative arts and entertainment” (NACE 90) and the “Motion pictures” (NACE 59) sectors while the negative general trend is driven by the downslide in the “Publishing activities” sector (NACE 58)

which, although it represent 49,3% of general employment in the CCSs, has nevertheless registered a fall of 29% in the last 6 years. The “Creative arts and entertainment” sector (NACE 90) accounts for 27,3% of the total employed in the CCSs and is the driving sector of the CCSs in Germany: in fact, only this sector has proven resilience during the crisis and this thanks to the number of those that are employed in front of the general positive trend.

Figure 313. Trend in Employment in CCSs for sector of activity in Germany

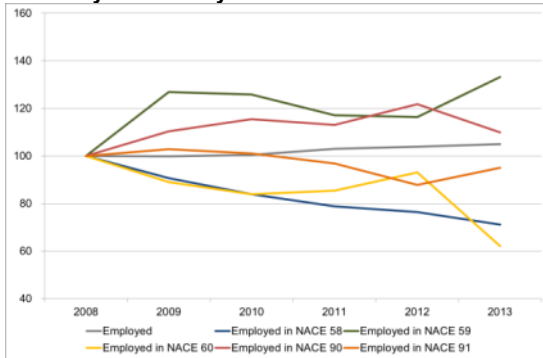
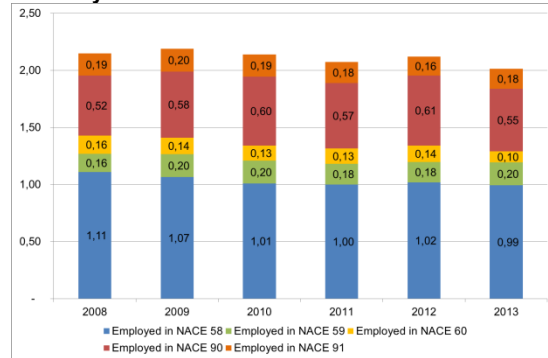


Figure 314. Composition of employed in CCSs in Germany



Source: Eurostat

However, as regards employment the young fare worse than adults. Except for those employed in the “Libraries, archives and museums” sector (NACE 91) who registered a positive trend, those employed in other sectors have registered a negative performance. Among the young the most important sector is represented by the “Publishing activities” sector (NACE 58) that accounts for 63% of the total young employed in the CCSs; another 15,4% are employed “Creative arts and entertainment” sector (NACE 90) and 11,8% are those employed in “Motion picture” sector (NACE 59).

Figure 315. Trend in Employment in CCSs for sector of activity for young employed in Belgium

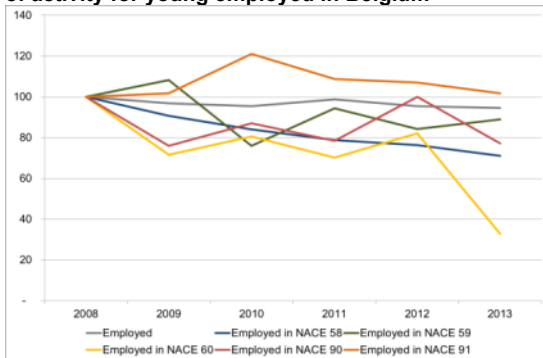
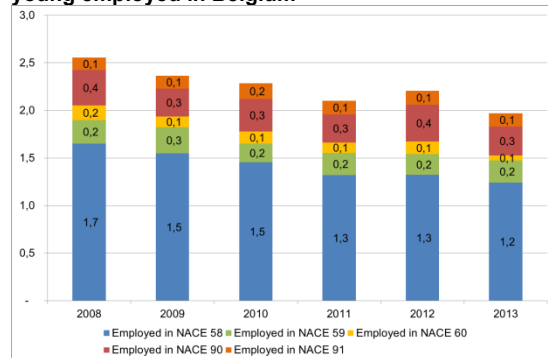


Figure 316. Composition of employed in CCSs for young employed in Belgium



Source: Eurostat

ICT

A very high rate of Germans (84%) use the Internet, while mobile subscriptions reach 120% of the inhabitants. 60% have a fixed telephone line and 34,6% have access to broadband.

Figure 317. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Germany

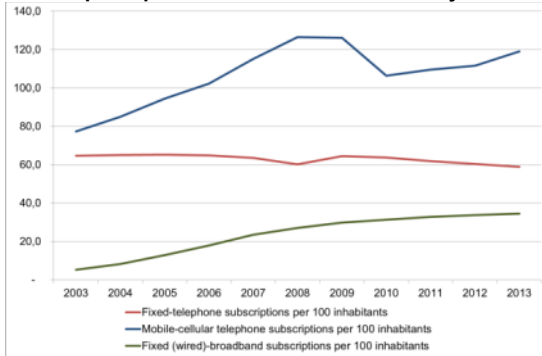
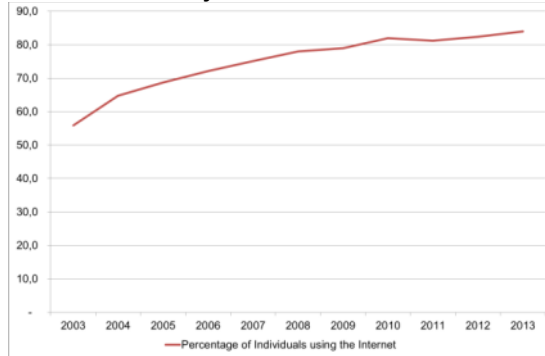


Figure 318. Percentage of Individuals using the Internet in Germany



Source: Eurostat

The general trend in employment in ICT is negative. Particularly negative is the performance of the “Computer programming” sector (NACE 63) where the employment rate has fallen approximately 50% in the last year (29,3% from 2008). A negative performance is also registered by the “Telecommunications” sector (NACE 61) that registered a decrease of 46,5% from 2008. The only ICT sector that registers a positive trend is the “Information services” sector (NACE 62) that, in 2013, represented 8,8% of total employment in the ICTs.

Figure 319. Trend in ICT Employment in Germany

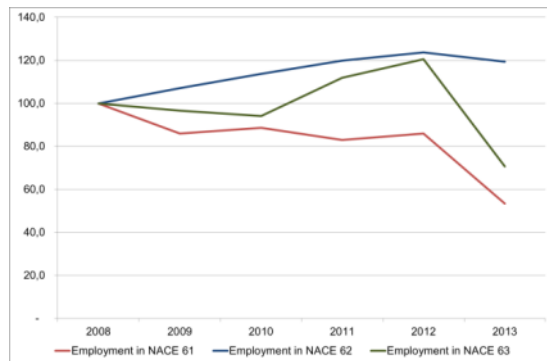
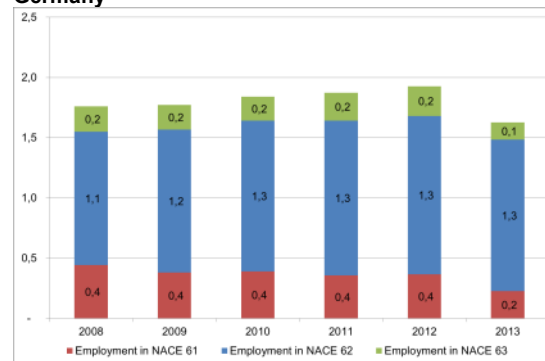


Figure 320. Composition of ICT Employment in Germany



Source: Eurostat

GREECE

Greece has been a Member State of the European Union since 1971. In 2013 it had a population of 11,2 million. The trend in population and labour force has been stable for the past 10 years while, in the same period, the young population has decreased and the young labour force has followed the same trend.

Figure 321. Trend in population in Greece

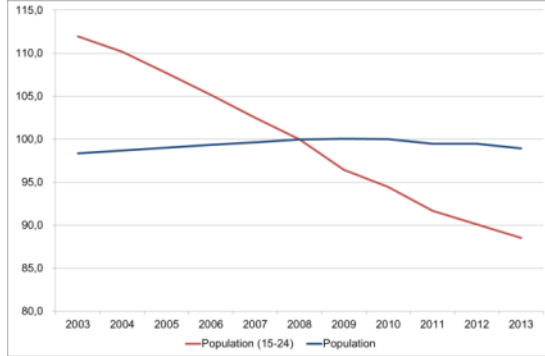
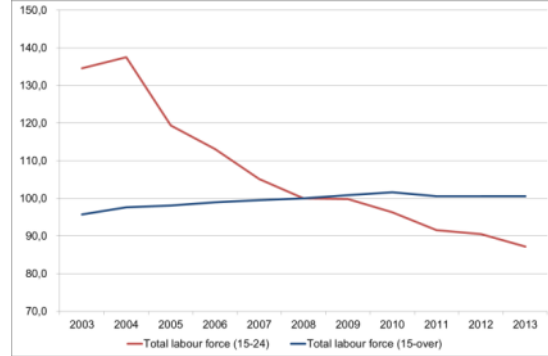


Figure 322. Trend in labour force in Greece



Source: Eurostat

The crisis has had a strong effect on Greece: GDP has fallen by 20% in the last 5 years and, since 2009, Greece has cut very seriously its public budget.

Figure 323. Trend in GDP in Greece

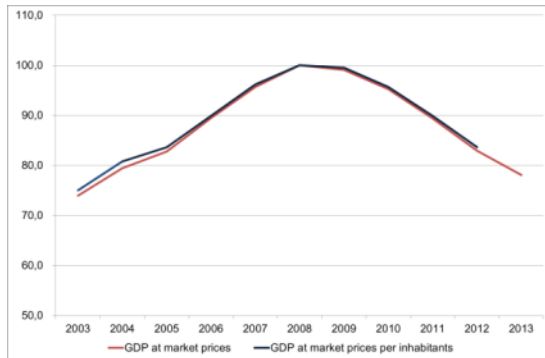
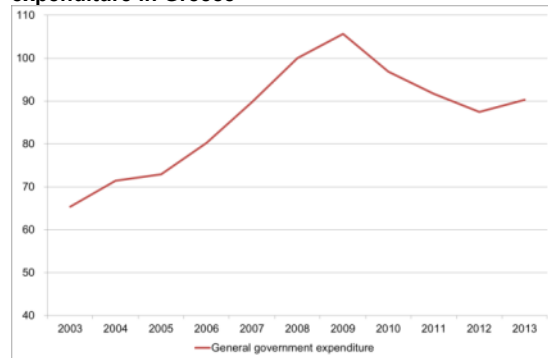


Figure 324. Trend in general government expenditure in Greece



Source: Eurostat

The most relevant effect of the crisis is to be seen in employment: in 5 years Greece has lost 20% of its jobs most of them among the young population. Indeed, the crisis is responsible for an overall strong negative trend as regards both employment and self-employment as shown by the charts below although the crisis has had less severe consequences for the self-employed.

Figure 325. Trend in employment in Greece

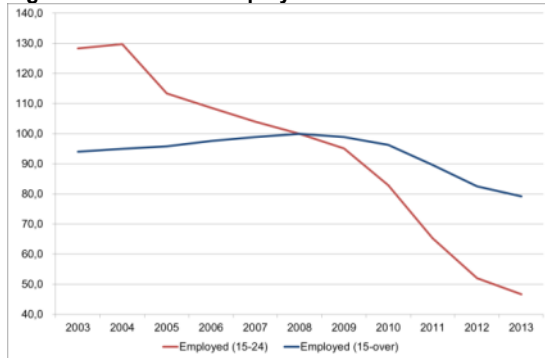
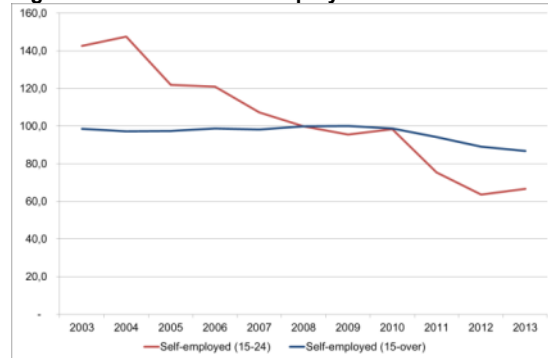


Figure 326. Trend in self-employment in Greece

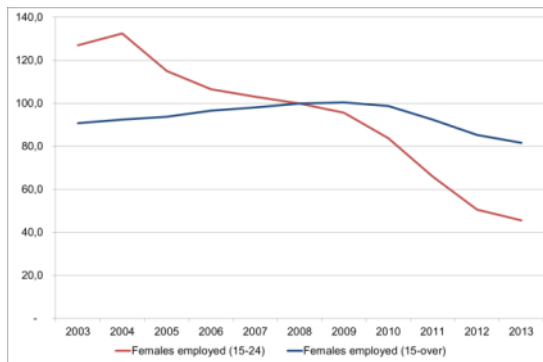


Source: Eurostat

Social environment

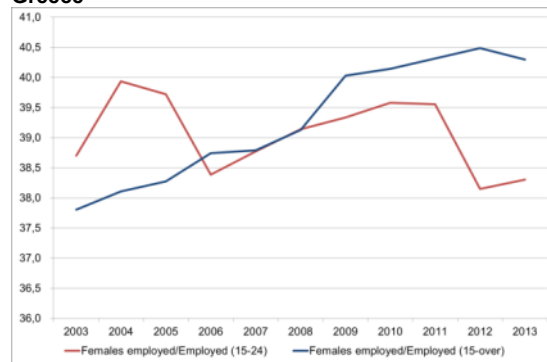
Although the crisis has had consequences also as regards the women employed, still the trend is less severe than the general trend. In fact women's participation in the labour market was higher in 2013 than it was 2003 and reached 40,3% at the end of the period under analysis.

Figure 327. Trend in Female employment in Greece



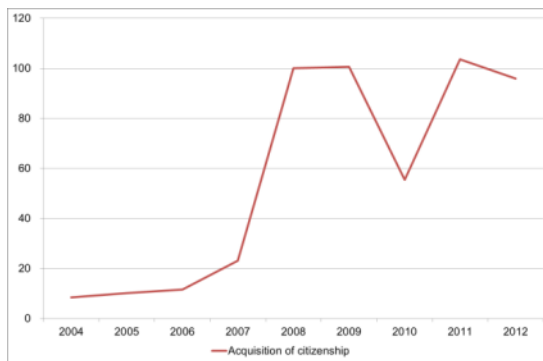
Source: Eurostat

Figure 328. Female participation to labour market in Greece



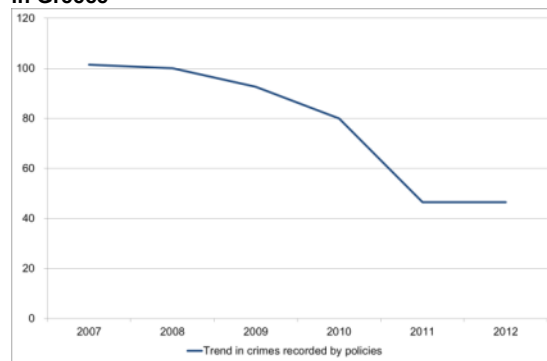
Despite the crisis, the crime rate has decreased since 2007 and, as regards the granting of citizenship, there has been an increase which attests that Greece is not facing this period by closing up the options and applying a rigid policy on this issue.

Figure 329. Acquisition of Citizenship in Greece



Source: Eurostat

Figure 330. Trend in crimes recorded by the police in Greece



The rate of the young population at risk of poverty and exclusion is worrying since it has peaked at 45%; however, there are less young people that leave education before having completed their compulsory education period.

Figure 331. Young people at risk of poverty or exclusion in Greece

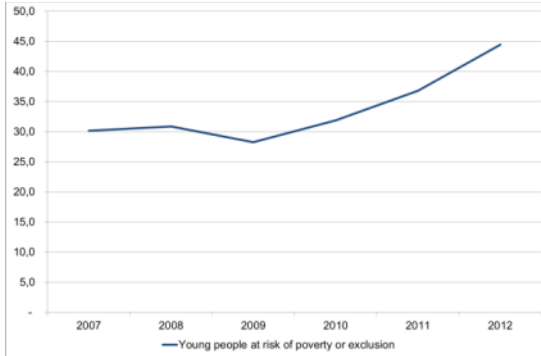
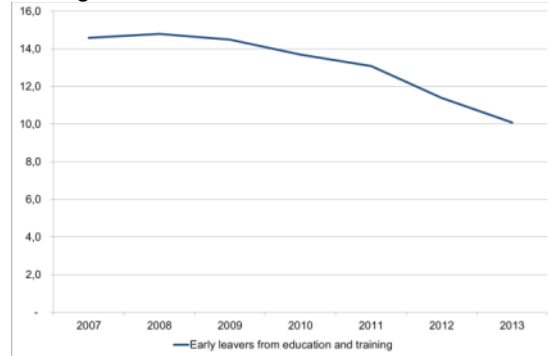


Figure 332. Early leavers from education and training in Greece



Source: Eurostat

Family ties and networks are very strong in Greece: 96,5% of the population declare they trust their closer relatives and friends and social trust is considerably high among both adults and young people; 18,9% of adults declare participating in voluntary activities as do 15,7% of the young. Only 3,3% of the population declares participating in charitable activities.

Table 34. Other trust indicators in Greece

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		96,5
Participation in informal voluntary activities	Adult	18,9
Participation in informal voluntary activities	Young	15,7
Participation in activities of charitable organisations		3,3

Source: Eurostat

Culture and Creativity

The CCSs in Greece are very performing. Despite the crisis the GDP related to CCSs has grown and, in 2011, it accounted for a 9,4% more than in 2008 and for a 54,3% more than in 2003. Over the same period, the contribution of the CCSs to the general economy has grown reaching 2,73% of the total GDP.

Figure 333. Trend of GDP in CCSs in Greece

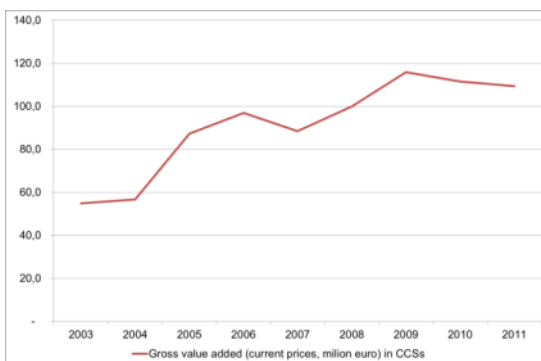
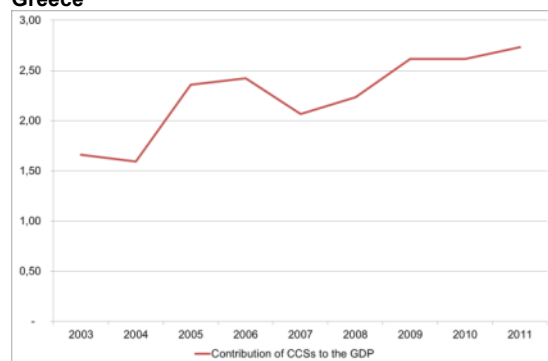


Figure 334. Contribution of CCSs to the GDP in Greece



Source: Eurostat

Since 2009 public expenditure in culture has not grown but, indeed, the budget cuts have not affected culture more than they have affected other sectors. The rate of cultural expenditure on total expenditure was 1,93% in 2013 (1,13% in 2003).

Figure 335. Trend in public expenditure in Culture in Greece

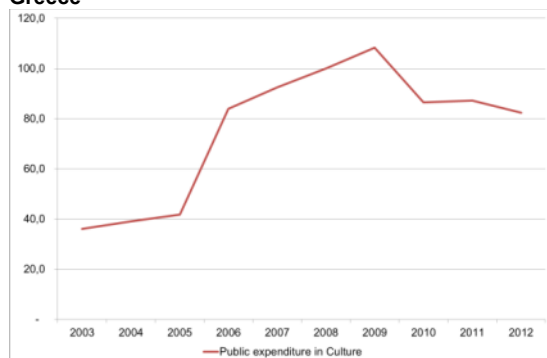
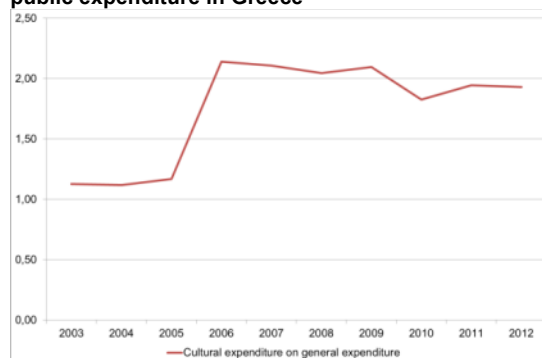


Figure 336. Public cultural expenditure on total public expenditure in Greece



Source: Eurostat

Demand and Supply of Culture and Creativity

The cultural heritage of Greece includes 17 UNESCO cultural sites and 176 museums (1,44 per 100.000 inhabitants).

Table 35. Number of UNESCO cultural sites and museums in Greece

Description	Year	Number
UNESCO cultural sites	2013	17
Museums	2007	176

Source: Eurostat, EGMUS

Cultural participation is not very high: 14,8% of the population declares visiting cultural sites during the year and only 2,4% more than 4 times per year; 38,4% goes to the cinema but only 16,5% more than 4 times per year; 31,3% attend live performances but only 7% more than 4 times per year.

Table 36. Cultural behaviours in Greece

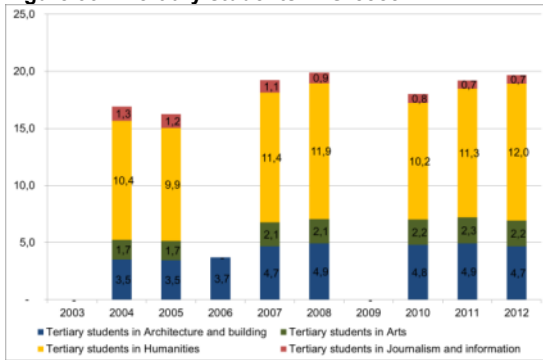
Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	68,7	24,3	4,7	1,7	0,6
Times going to the cinema	61,6	22,0	9,5	4,2	2,8
Visits to cultural sites	85,2	12,4	1,7	0,4	0,3

Source: Eurostat

Education

Data for tertiary students are not complete and it is therefore difficult to identify a general trend. Still, the following chart shows that students in the Humanities are the majority accounting for 12% of the total student population and those in Architecture and building account for 4,7%. Other sectors, such as the Arts and Journalism and information account for a very reduced percentage: 2,2% and 0,7% respectively.

Figure 337. Tertiary students in Greece

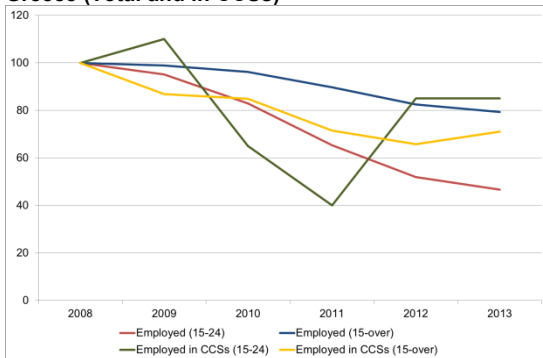


Source: Eurostat

Employment and Young employment

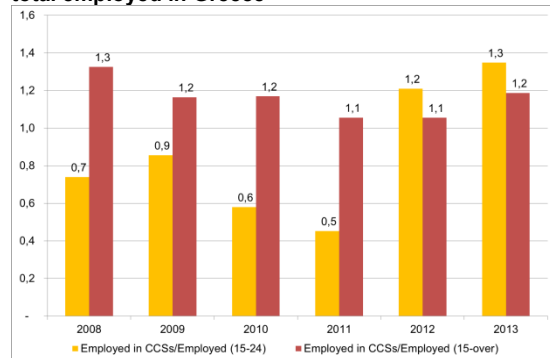
Those employed in the CCSs represent 1,2% of the total employed. The following charts shows that those employed in the CCSs have, indeed, a good degree of resilience since they perform better than colleagues that work in other sectors. The trend is evident for the young employed (8,2% of the young employed) although it is a little less evident for adults.

Figure 338. Employment and young employment in Greece (Total and in CCSs)



Source: Eurostat

Figure 339. Composition of Employed in CCSs on total employed in Greece



The analysis of the data available clearly shows that, for the CCSs, the most relevant sector is the “Creative arts and entertainment” sector (NACE 90) which accounts for 30,1% of the total employed in the CCSs followed by the “Publishing activities” sector (NACE 58) which accounts for 27,3%. These 2 sectors seem to be the most dynamic and register a higher performance than the general trend, driving the overall positive trend visible for the CCSs.

Figure 340. Trend in Employment in CCSs for sector of activity in Greece

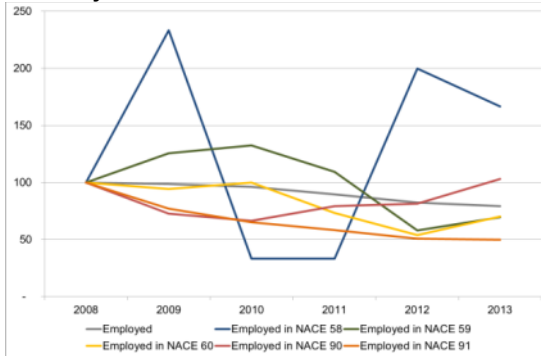
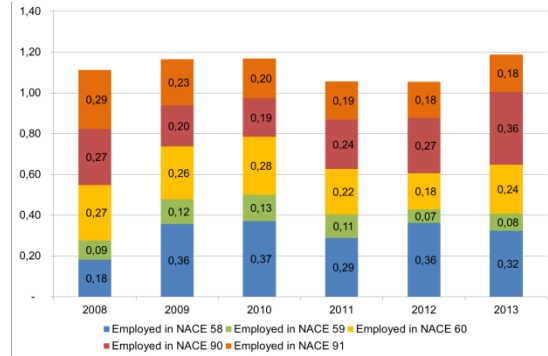


Figure 341. Composition of employed in CCSs in Greece



Source: Eurostat

Data concerning the young employed are less constant given the fairly limited number of the employed. In any case, the general trend is confirmed and the performance of the employed in the “Creative arts and entertainment” sector (NACE 90) and the “Publishing activities” sector (NACE 58) is not only better than the general trend but also drives the overall positive trend in the CCSs.

Figure 342. Trend in Employment in CCSs for sector of activity for young employed in Greece

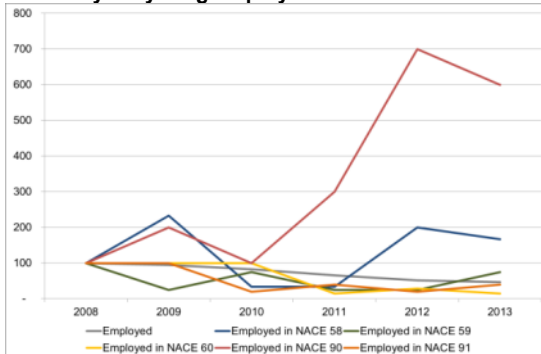
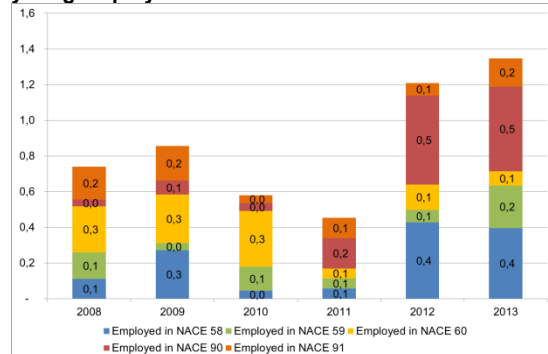


Figure 343. Composition of employed in CCSs for young employed in Greece



Source: Eurostat

ICT

The ICT sector in Greece has developed over the last years: 60% of the population uses the Internet and broadband reaches 26% of the population. Mobile subscriptions registered a stop in 2007 and have been stable over the last 2 years. Fixed telephone line subscriptions have decreased in the last 10 years but at a lower rate than in other sectors.

Figure 344. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Greece

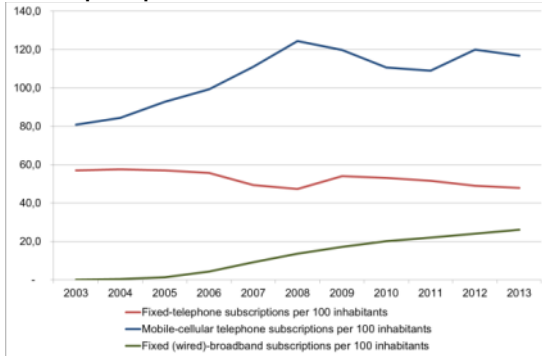
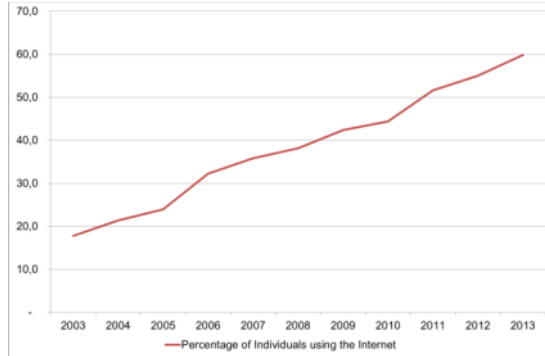


Figure 345. Percentage of Individuals using the Internet in Greece



Source: Eurostat

Trends for employment in the ICTs, shown in the following charts, indicate that the “Information services” (NACE 63) and the “Computer programming” (NACE 62) sectors are the 2 driving sectors while the “Telecommunications” sector (NACE 61) follows the general trend.

Figure 346. Trend in ICT Employment in Greece

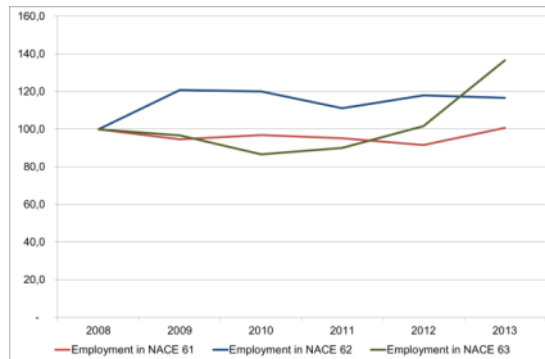
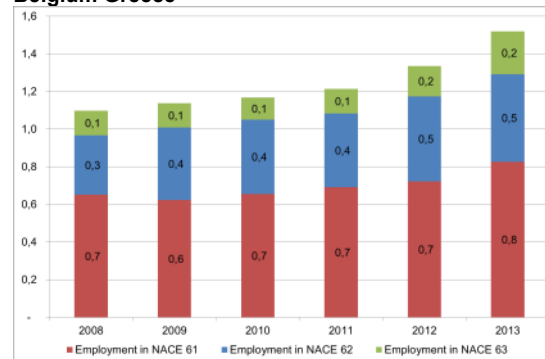


Figure 347. Composition of ICT Employment in Belgium Greece



Source: Eurostat

HUNGARY

Hungary has been a Member State of the European Union since 2004. In 2013 it had a population of 10 million inhabitants: the demographic trend in the country is slightly decreasing while the labour force has, in the last two years, increased thanks to new young labour force available.

Figure 348. Trend in population in Hungary

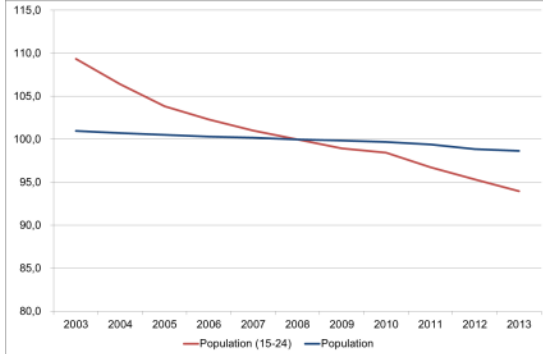
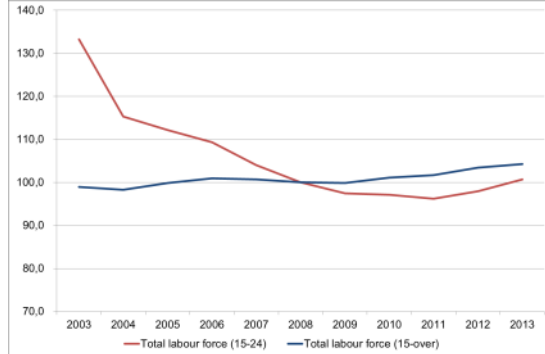


Figure 349. Trend in labour force in Hungary



Source: Eurostat

After the crisis, the country faced a strong stop in its economic growth: GDP fell by over 10% between 2008 and 2009 and, in the following years, the country has not been able to reach the level of GDP it had before the crisis. Indeed, the crisis also affected the general expenditure which fell by 10% during the same years and which has, since, remained stable.

Figure 350. Trend in GDP in Hungary

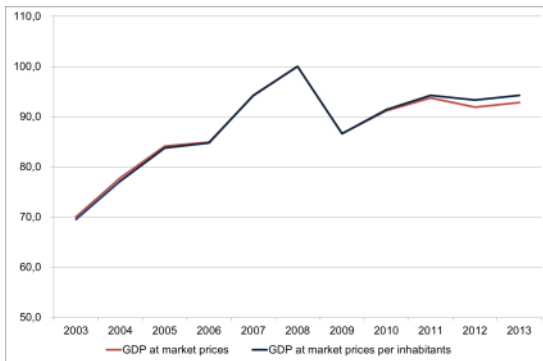
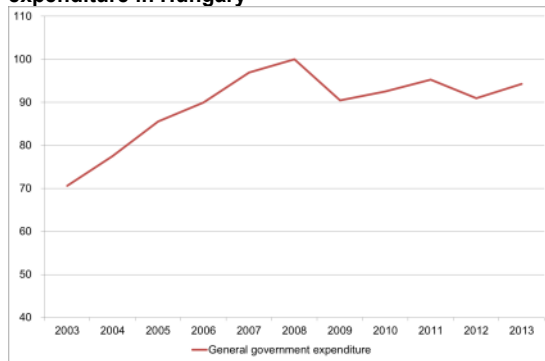


Figure 351. Trend in general government expenditure in Hungary



Source: Eurostat

The crisis affected young people more than it did adults: whereas the general employment rate in 2013 was quite the same as in 2008, the trend for young people represents an 8,5% less than in 2008. A different situation appears for self-employment where the trend for both adult and young workers is negative.

Figure 352. Trend in employment in Hungary

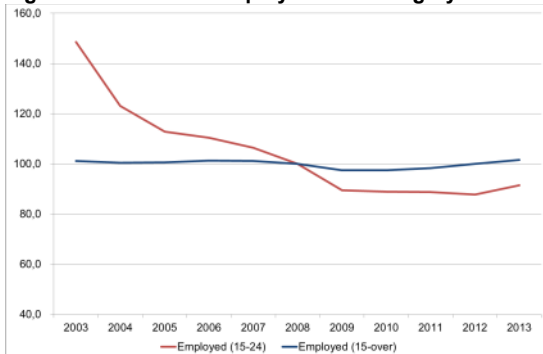
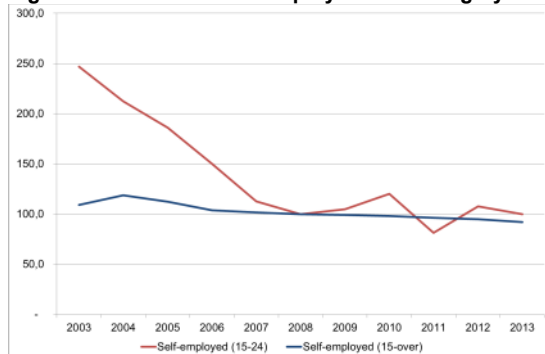


Figure 353. Trend in self-employment in Hungary



Source: Eurostat

Social environment

The number of women employed after the crisis registered a slight increase and the young women employed seem to be less affected by the crisis than the rest. The effect is an overall higher participation of women in the labour market which has reached 46% in 2013.

Figure 354. Trend in Female employment in Hungary

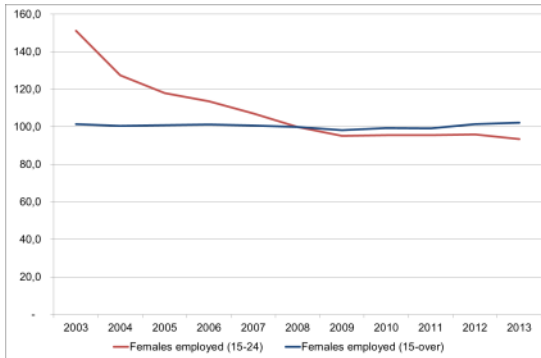
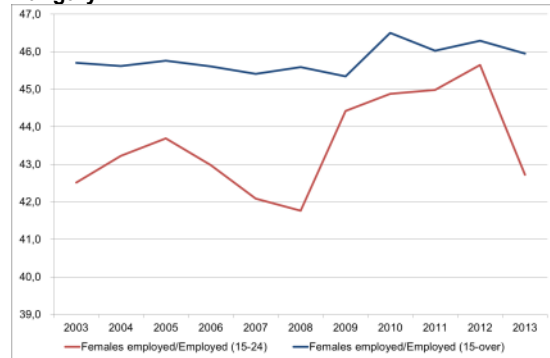


Figure 355. Female participation to labour market in Hungary



Source: Eurostat

The granting of citizenship reached its peak in 2010 and, from 2011, has been stable. Between 2007 and 2012 the number of crimes recorded rose by 15%.

Figure 356. Acquisition of Citizenship in Hungary

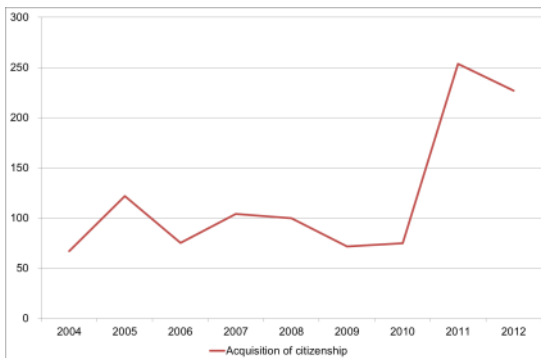
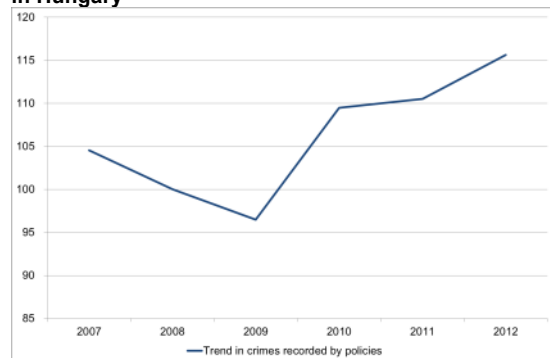


Figure 357. Trend in crimes recorded by the police in Hungary



Source: Eurostat

In the last 6 years the number of young people at risk of poverty has increased between 2007 and 2012 and is now at a worrying level of 37,8%. Over the same period the number of early school leavers initially decreased but has again increased in the last 3 years, reaching the same level as in 2007.

Figure 358. Young people at risk of poverty or exclusion in Hungary

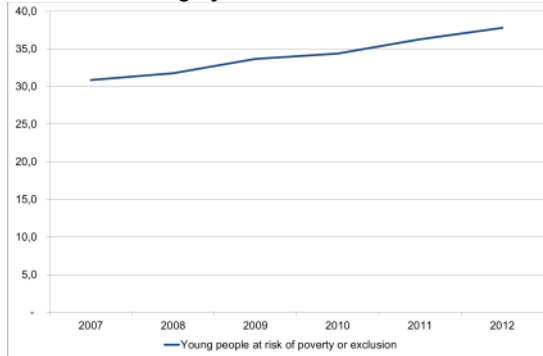
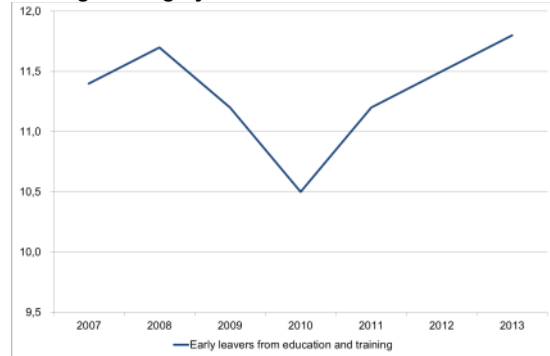


Figure 359. Early leavers from education and training in Hungary



Source: Eurostat

92% of Hungarians trust family and friends and this is a good indicator of a healthy social and personal condition. Nevertheless, general trust, measured by participation in voluntary activities and charitable organizations, is lower than in other European countries.

Table 37. Other trust indicators in Hungary

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		92,1
Participation in informal voluntary activities	Adult	11,1
Participation in informal voluntary activities	Young	8,6
Participation in activities of charitable organisations		1,6

Source: Eurostat

Overall, Hungary seems a relatively open country with the basic conditions for the development of the cultural and creative economy.

Culture and Creativity

The trend in GDP for the CCSs is generally better than the general trend: following an increase to 2% of the total GDP in 2007 there has been, since 2010, a slight decrease to 1,87%.

Figure 360. Trend of GDP in CCSs in Hungary

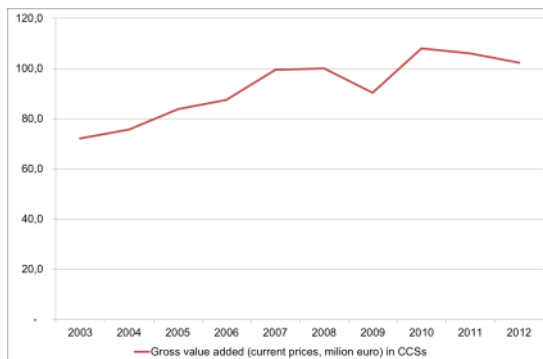
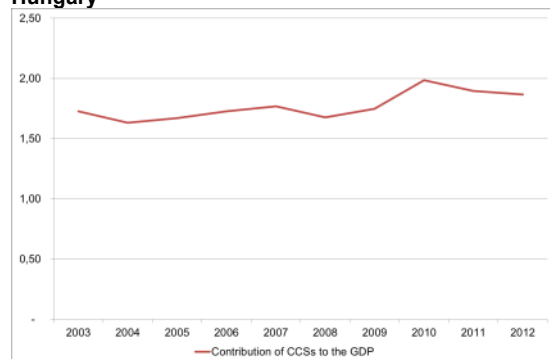


Figure 361. Contribution of CCSs to the GDP in Hungary



Source: Eurostat

The cultural sector in the last 3 years registered a strong increase of public funding that reached 6,3% in 2012, after a general decrease between 2007 and 2009.

Figure 362. Trend in public expenditure in Culture in Hungary

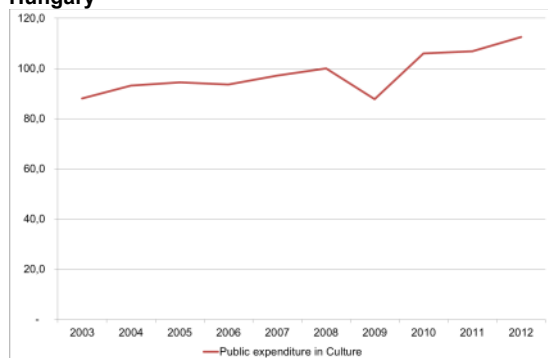


Figure 363. Public cultural expenditure on total public expenditure in Hungary



Source: Eurostat

Demand and Supply of Culture and Creativity

In Hungary there are 7 UNESCO cultural sites and 734 museums (6,6 per 100.000 people).

Table 38. Number of UNESCO cultural sites and museums in Hungary

Description	Year	Number
UNESCO cultural sites	2013	7
Museums	2012	734

Source: Eurostat, EGMUS

Cultural participation is high: 41,1% of the population declares visiting cultural sites (19,8% repeat the experience); 29,4% goes to the cinema (15% more than 4 times a year) and 34,4% attend live performances (15,9% more than 4 times a year).

Table 39. Cultural behaviours in Hungary

Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	65,6	18,6	7,7	5,4	2,8
Times going to the cinema	70,6	14,5	8,0	4,7	2,3
Visits to cultural sites	58,9	21,2	10,5	6,4	2,9

Source: Eurostat

Education

The general trend for tertiary students in culture-related subjects rose from 2003 to 2009 and then decreased, from 2012. The highest number of students are enrolled in the Humanities (6,6%) but has decreased since 2008; students in Architecture and buildings and in the Arts are growing but they were, respectively, at 3,2% and 2,5% in 2013. Journalism and information accounts for 2,7% of the total student population and has decreased since 2008.

Figure 364. Trend in tertiary students in Hungary

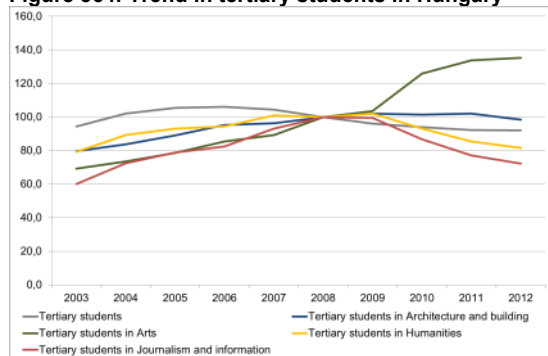
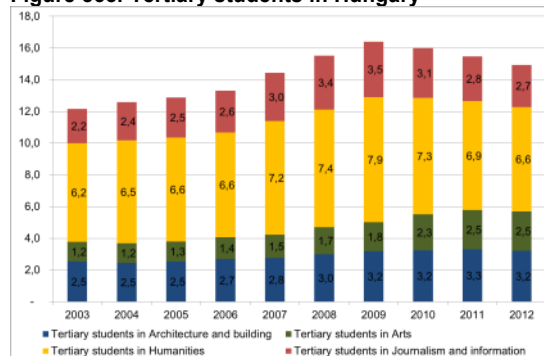


Figure 365. Tertiary students in Hungary



Source: Eurostat

Employment and Young employment

The following charts show the trend and the composition of employment in the CCSs. In general terms, the employed in CCSs represent 1,7% of the total employed but are decreasing while young people represent 4,7% of the young employed and are increasing, albeit a lack of data in 2011 that make the trend discontinuous.

Figure 366. Employment and young employment in Hungary (Total and in CCSs)

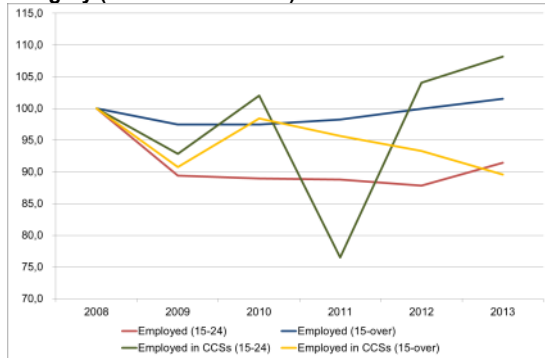
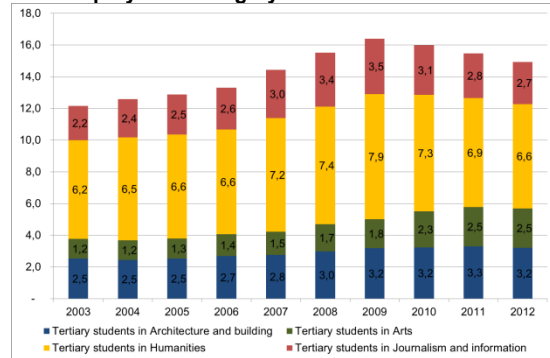


Figure 367. Composition of Employed in CCSs on total employed in Hungary



Source: Eurostat

The trends in employment in the CCSs are shown in the charts below. The employed in the “Publishing activities” sector (NACE 58) are the most dynamic: they account for 0,52% of general employment and for the most important part of those employed in the CCSs. Still, as in many other countries, this sector is the one that is losing the higher number of jobs and where the crisis is stronger. The other sectors have a trend similar to the trend for the general employment: the “Programming and broadcasting” sector (NACE 60) rose by about 5% in the last 6 years reaching 0,21% of the total employed; the “Creative Arts and entertainment” sector (NACE 90) has been stable throughout the same period and the “Libraries, archives and museums” sector (NACE 91) has registered a negative trend and represent less than 0.01% of the total employed.

Figure 368. Trend in Employment in CCSs for sector of activity in Hungary

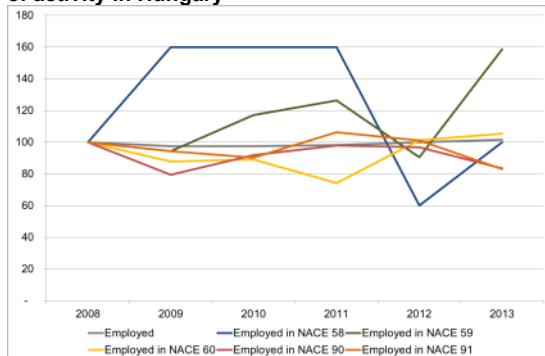
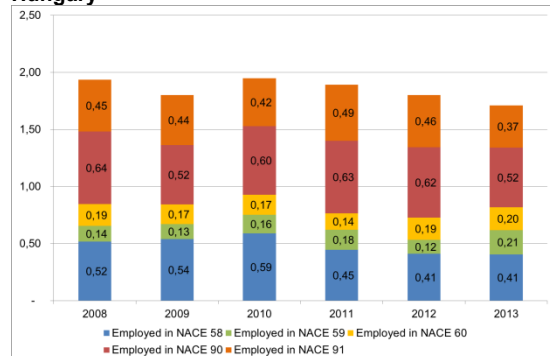


Figure 369. Composition of employed in CCSs in Hungary

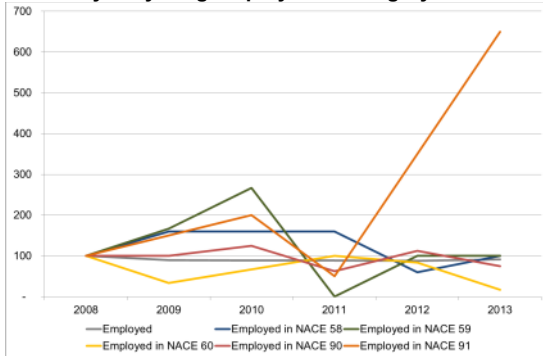


Source: Eurostat

The trend for young people is scarcely significant due to the limited data available but a general trend can be nevertheless appreciated through the charts below.

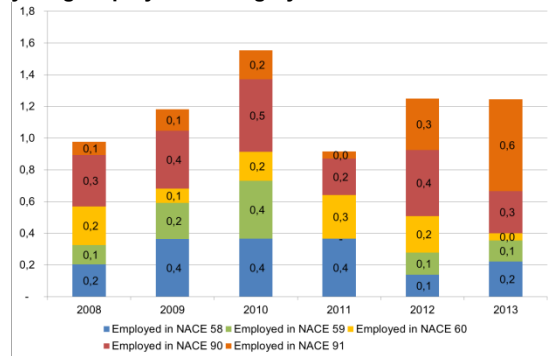
The “Libraries, archives and museums” sector (NACE 91) in 2013 represent 0,6% of total employment and from an initial 0,1% have an increase rate of 600%, while the other trends are similar to the general trend.

Figure 370. Trend in Employment in CCSs for sector of activity for young employed in Hungary



Source: Eurostat

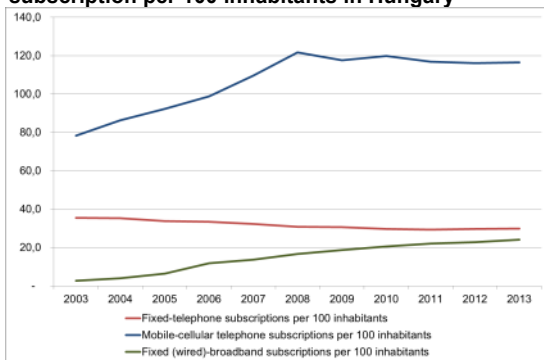
Figure 371. Composition of employed in CCSs for young employed in Hungary



ICT

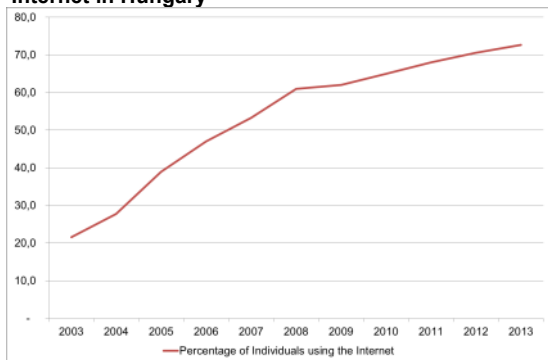
In Hungary over 70% of people use the Internet and there are 120 subscriptions to mobile phones per 100 inhabitants. The fixed telephone lines subscriptions are less than 30% and the broadband reaches 24,1 inhabitants every 100.

Figure 372. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Hungary



Source: Eurostat

Figure 373. Percentage of Individuals using the Internet in Hungary



The employment in the sector is driven by the “Computer programming” sector (NACE 62) which represents 1,2% of total employment and which has increased more than the general trend. In 2012 the “Telecommunications” sector (NACE 61) started to decline but the general trend registered is better than the European trend with 0,6% of total employment. The most dynamic sector is the “Information services” sector (NACE 63) which grows faster than the others but represents 0,3% of total employment. Overall, in 2013 employment in the ICTs accounted for 2% of total employment.

Figure 374. Trend in ICT Employment in Hungary

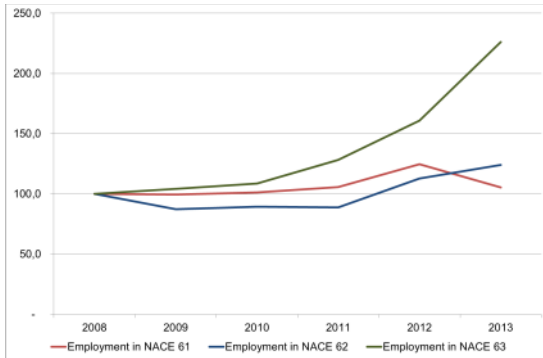
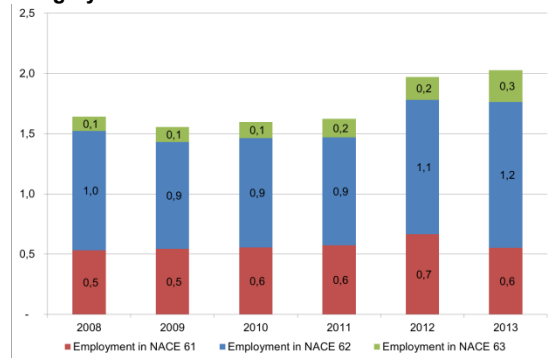


Figure 375. Composition of ICT Employment in Hungary



Source: Eurostat

IRELAND

Ireland has been a Member State of the European Union since 1973. It has 4,6 million inhabitants of which 500,000 are young; its population has decreased notably in the last 10 years with a loss of 100,000 units. Consequently, the labour force is decreasing as regards both adults and young people.

Figure 376. Trend in population in Ireland

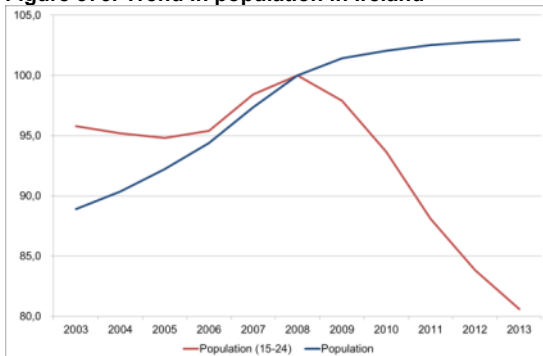
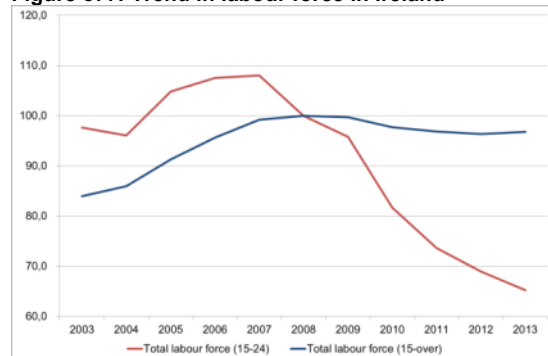


Figure 377. Trend in labour force in Ireland



Source: Eurostat

The economic crisis has affected Ireland more than other countries. The charts below show the trend in GDP and in government expenditure in the last 10 years: in 2013 GDP decreased by 9% and the general public expenditure followed a similar trend, with a peak in 2010.

Figure 378. Trend in GDP in Ireland

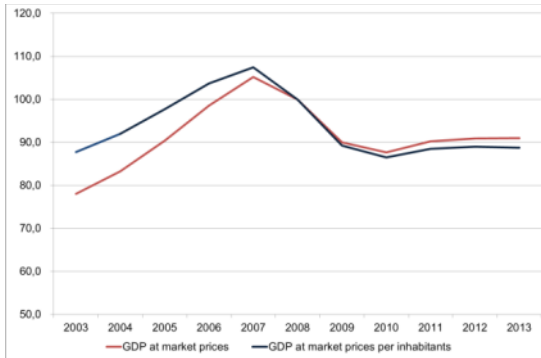
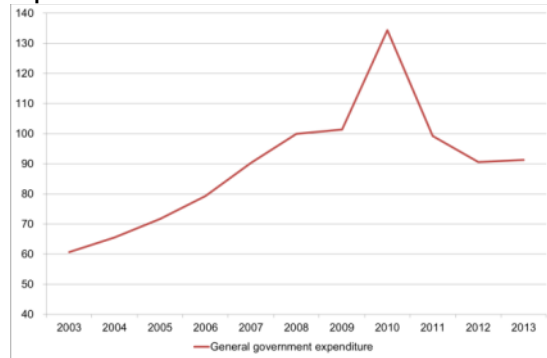


Figure 379. Trend in general government expenditure in Ireland



Source: Eurostat

Over the same period 10,5% of jobs were lost. This trend hit the young generations especially hard with a loss of jobs equivalent to 45,3%. An even stronger effect of the crisis has been registered among the self-employed where there has been a decrease of 11,5% for adults and of 37,4% for the young.

Figure 380. Trend in employment in Ireland

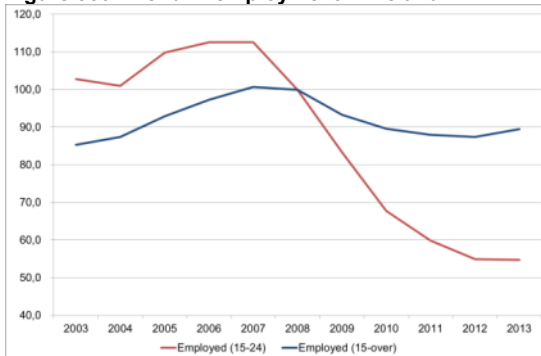
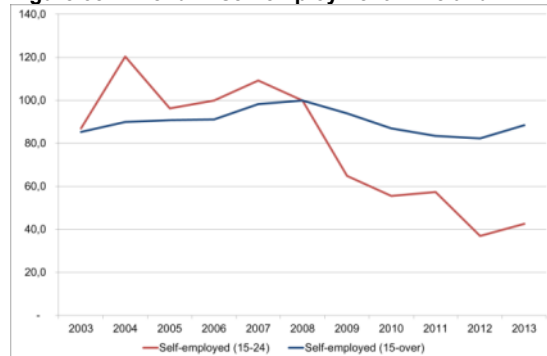


Figure 381. Trend in self-employment in Ireland



Source: Eurostat

Social environment

Inclusion of women in the Irish labour market is very high: over 50% of the young employed are women and among adults they reach a high 46%. The trend in female employment from 2008 confirms the European trend and women have shown a higher resilience in employment than men: women employed lost 6% over the total and young women 44,3%.

Figure 382. Trend in Female employment in Ireland

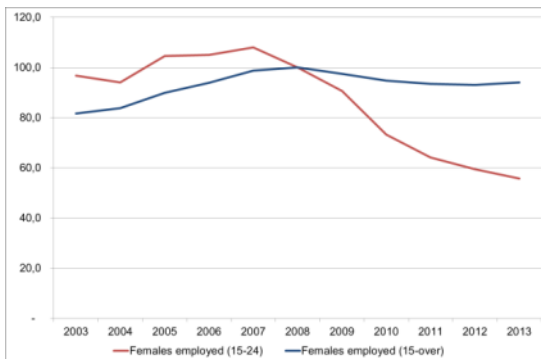
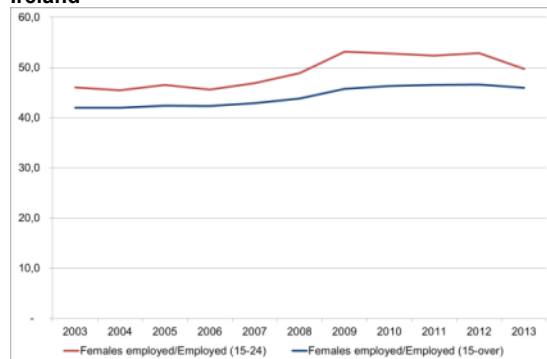


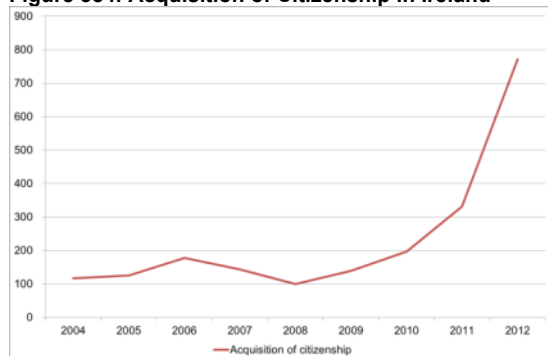
Figure 383. Female participation to labour market in Ireland



Source: Eurostat

In the last years citizenship acquisition in Ireland registered a strong increase. This indicator reflects a good permeability of the Irish society over the last years.

Figure 384. Acquisition of Citizenship in Ireland



Source: Eurostat

After the crisis, the situation of young people has worsened but public policies fostering inclusion seem to be effective. While the trend of the risk of young exclusion has increased, reaching 37,8%, the early school leavers have decreased to 8% from an initial 12% in 2007.

Figure 385. Young people at risk of poverty or exclusion in Ireland

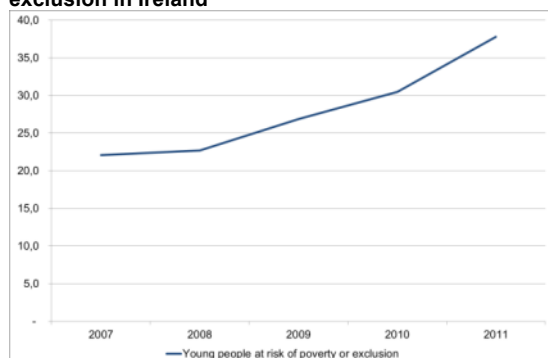
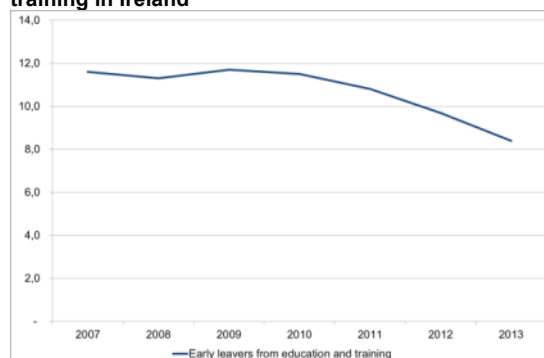


Figure 386. Early leavers from education and training in Ireland



Source: Eurostat

The social situation is represented in the table below: the value of family and closer relations is very strong. 96,6% of the population declare to be able to ask for help within their closer circle of relationships. The percentage of individuals that actively participate in social life is 25,6% for adults and 17,2% for the young. A strong participation in the activities of charitable organizations is another indicator that shows the level of trust in society. For reasons relating to tradition this indicator is higher in northern European countries.

Table 40. Other trust indicators in Ireland

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		96,6
Participation in informal voluntary activities	Adult	25,6
Participation in informal voluntary activities	Young	17,2
Participation in activities of charitable organisations		24,1

Source: Eurostat

Culture and Creativity

The following graphs show the economic trend in CCSs. On the one hand, GDP in CCSs has increased in the last 4 years faster than in the general economy. In total, the GDP in the

sector loses a 7,8%, less than the general trend. The charts show that the contribution of CCSs to GDP is increasing, reaching 0,94% of the total GDP.

Figure 387. Trend of GDP in CCSs in Ireland

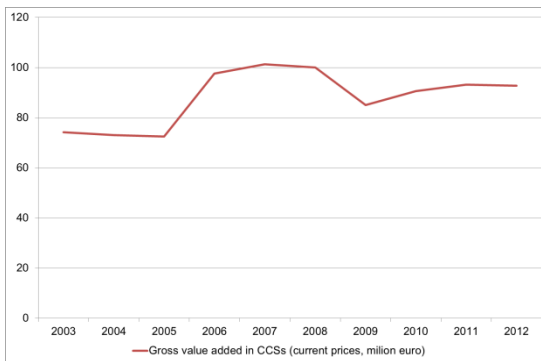
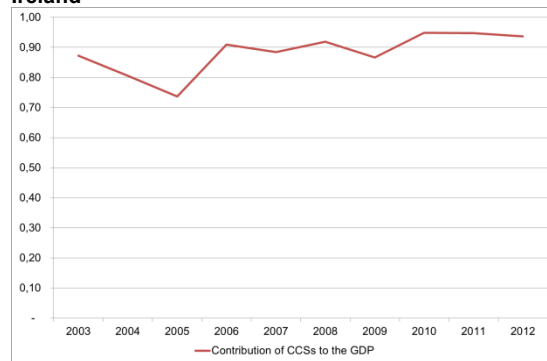


Figure 388. Contribution of CCSs to the GDP in Ireland



Source: Eurostat

Public expenditure in culture registered a stop in 2009 and then started to grow again. In 2013 cultural expenditure represented 3,3% of the total public expenditure.

Figure 389. Trend in public expenditure in Culture in Ireland

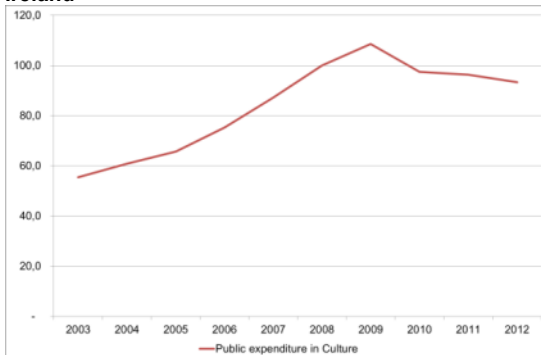
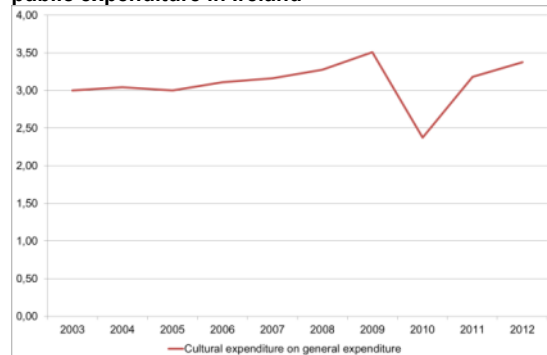


Figure 390. Public cultural expenditure on total public expenditure in Ireland



Source: Eurostat

Demand and Supply of Culture and Creativity

Ireland has 2 UNESCO cultural sites and 258 museums (5 museums every 100.000 inhabitants).

Table 41. Number of UNESCO cultural sites and museums in Ireland

Description	Year	Number
UNESCO cultural sites	2013	2
Museums	2005	258

Source: Eurostat, EGMUS

As regards demand, strong participation in cultural life is registered by people that attend live performances (46,5%) and go to the cinema (46%) while a lower rate is registered by people that claim they visit cultural sites (35,5%). The stronger cultural consumers, those who attend cultural activities more than 4 times a year, are divided as follows: 14,6% attend live performances, 23,1% go to the cinema and 14,1% visit cultural sites.

Table 42. Cultural behaviours in Ireland

Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	53,5	31,8	9,2	3,0	2,4
Times going to the cinema	54,0	22,9	11,1	6,1	5,9
Visits to cultural sites	64,5	21,4	7,6	3,2	3,3

Source: Eurostat

Education

The following charts show the trend and the composition of tertiary students in Ireland. The most important number of students are registered in the Arts (6,4% of total tertiary students) and the Humanities (6,3% of total tertiary students). The students in Architecture and building are 3,7% of the total students population while 1,1% are students in Journalism and information.

In general, the trend for studies in culture-related subjects is worse than for the rest.

Figure 391. Trend in tertiary students in Ireland

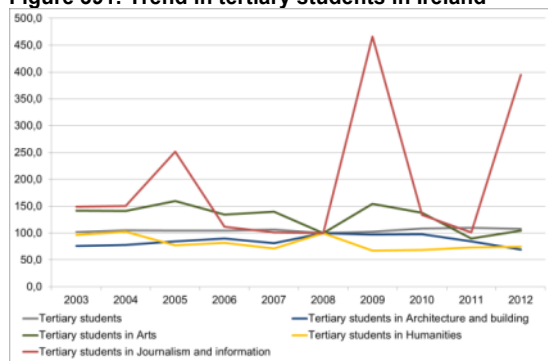
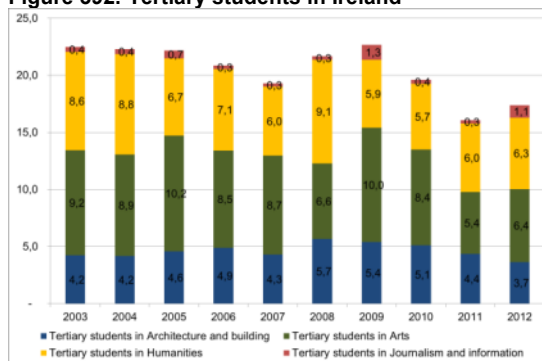


Figure 392. Tertiary students in Ireland



Source: Eurostat

Employment and Young employment

In 2013 1,5% of the employed were employed in the CCSs; 1,6% of the young employed. The trend shown in the charts below illustrates that the employed in the CCSs registered a better performance than the general labour market. The trend is confirmed for both adults and the young employed.

Figure 393. Employment and young employment in Ireland (Total and in CCSs)

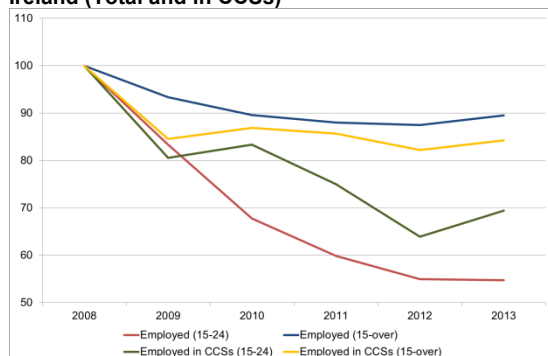


Figure 394. Composition of Employed in CCSs on total employed in Ireland

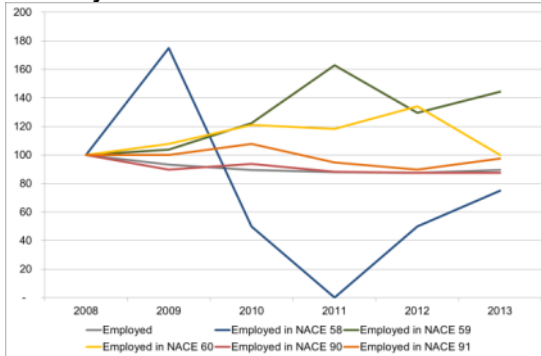


Source: Eurostat

The following charts show the trend and the composition of employment in the CCSs. The sectors that register a negative performance are the “Publishing activities” (NACE 58), “Creative arts and entertainment” (NACE 90) and “Libraries, archives and museums” (NACE 91) sectors. Still, the latter registers a better performance than the general labour market.

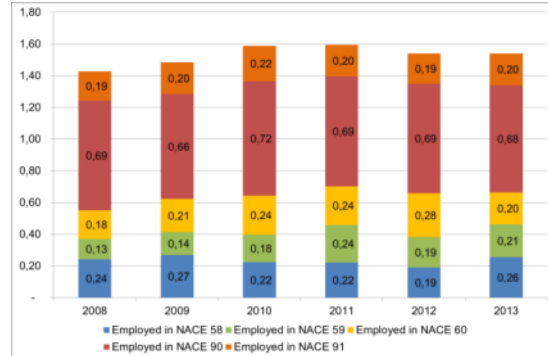
The employed in the “Motion picture, video and television program production, sound recording and music publishing activities” sector (NACE 59) and in the “Programming and broadcasting activities” sector (NACE 60) register a better performance than the general labour market. The largest number of those employed works in the “Creative arts and entertainment” sector (NACE 90) - 0,68% of the employed – while other sectors account for less than 0,26% of the total employed.

Figure 395. Trend in Employment in CCSs for sector of activity in Ireland



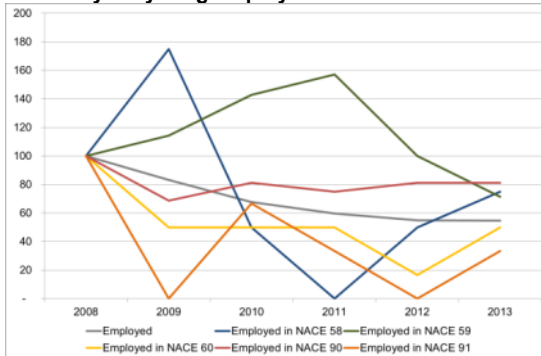
Source: Eurostat

Figure 396. Composition of employed in CCSs in Ireland



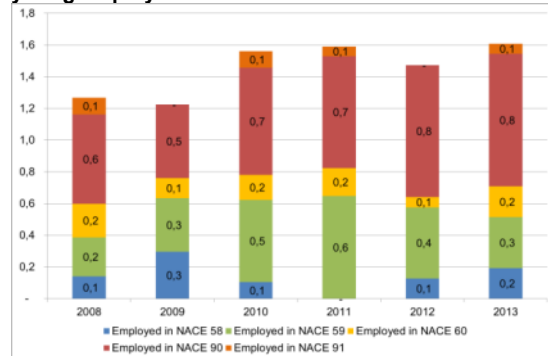
The employment trend for the young is different than for the adults. A better performance is registered for the “Creative arts and entertainment” sector (NACE 91) and for the “Publishing activities” (NACE 58). But, as it is possible to see from the charts below, the lack of data does not allow for a good level of reliability. 50% of the young employed in the CCSs works in the “Creative arts and entertainment” (NACE 90) and, for the past 10 years, their number has been stable.

Figure 397. Trend in Employment in CCSs for sector of activity for young employed in Ireland



Source: Eurostat

Figure 398. Composition of employed in CCSs for young employed in Ireland



ICT

In the ICT sector the market trend shows that both the mobile phone market and fixed phone market have decreased since 2008. The broadband penetration rate is rising constantly and 78,2% of the population uses the Internet.

Figure 399. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Ireland

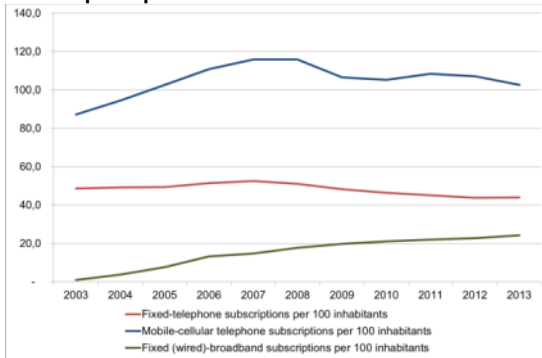
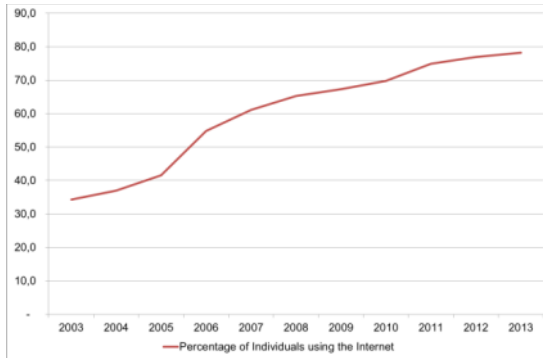


Figure 400. Percentage of Individuals using the Internet in Ireland



Source: Eurostat

In Ireland the labour market in the ICT has a similar trend as in the rest of Europe: while jobs in the “Telecommunications” sector (NACE 61) are decreasing, those in the “Computer programming” (NACE 62) and “Information services” (NACE 63) sectors are increasing. The total number of those employed in the ICT is equal to 3,5% of the total employed with the most important figure in the “Computer programming”(NACE 62) sector (2,4%of the total).

Figure 401. Trend in ICT Employment in Ireland

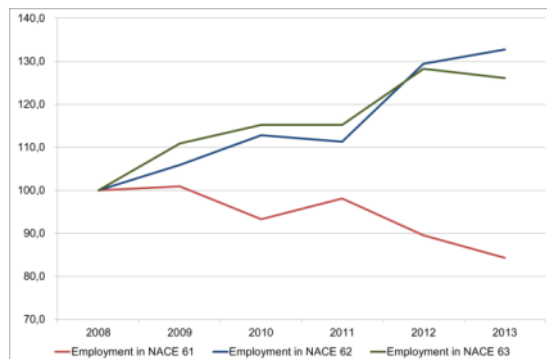
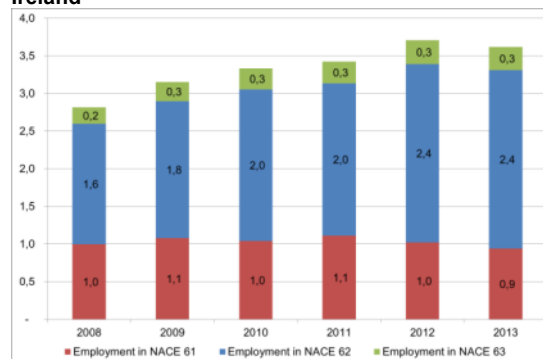


Figure 402. Composition of ICT Employment in Ireland



Source: Eurostat

ITALY

Italy was one of the founding members of the European Union in 1952. In 2013 the country had a population of over 60 million inhabitants.

While the overall population has slightly increased in the last 10 years, the young population is stable. The labour force, in the same period, rose by 1,7% while the young labour force registered a decrease of 12,6%.

Figure 403. Trend in population in Italy

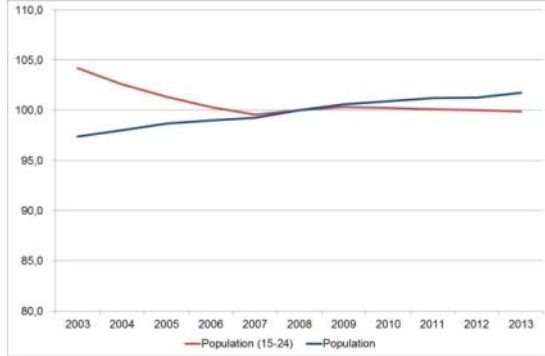
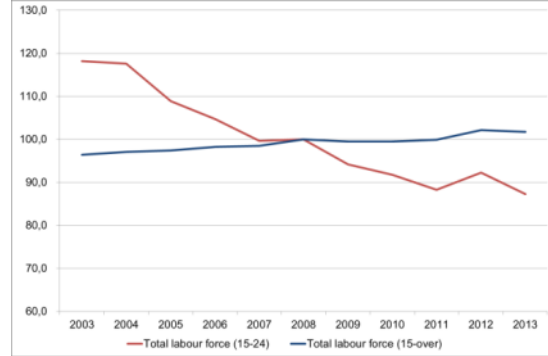


Figure 404. Trend in labour force in Italy



Source: Eurostat

Although in 2008 the GDP stopped growing, after 2009 it has started to grow again, albeit at a lower rate. The general government expenditure registered a growth until 2008 and, since 2009, it has stopped.

Figure 405. Trend in GDP in Italy

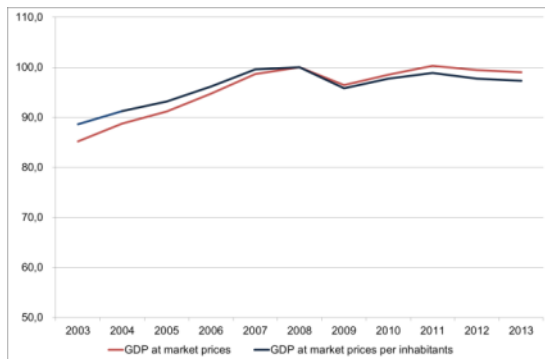
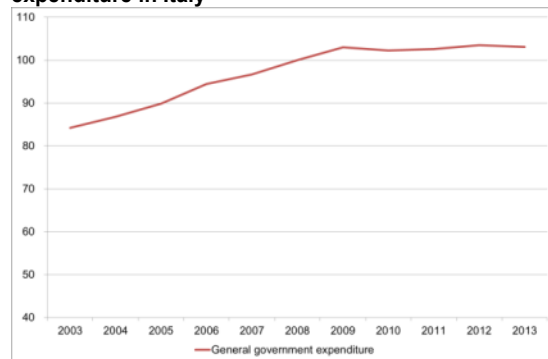


Figure 406. Trend in general government expenditure in Italy



Source: Eurostat

The following charts show that employment for adults has slightly decreased in the last 6 years; the same trend is apparent for the self-employed and for the young population the performance is even worse.

Figure 407. Trend in employment in Italy

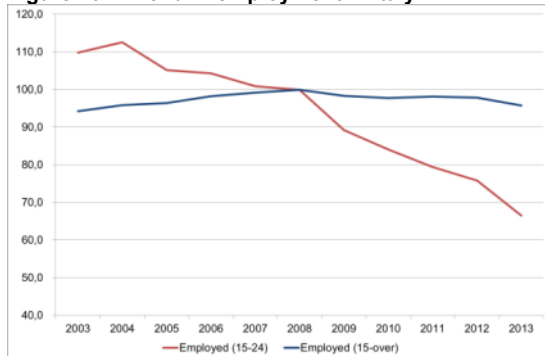
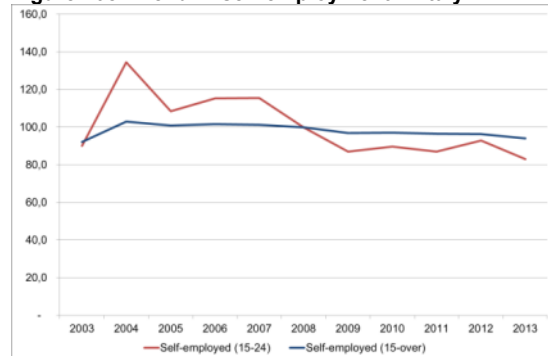


Figure 408. Trend in self-employment in Italy



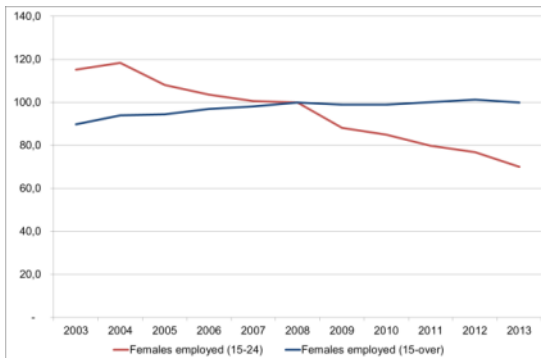
Source: Eurostat

Social environment

The employment of women registers a different trend: whereas general employment has decreased over the last years, the number of women employed has increased reaching

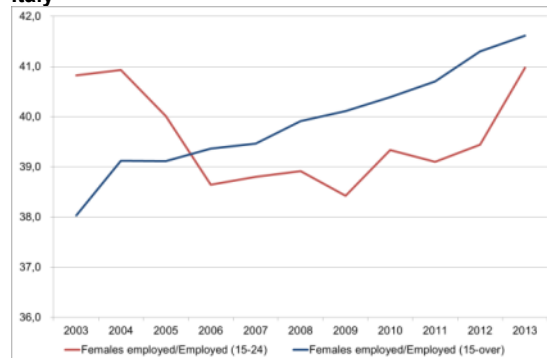
41,6% of the total employed. A similar trend is registered by the young employed that have decreased less than the general figure. The participation of women in the labour market has increased at a high rate in the last years, mostly due to the low rates registered in 2003.

Figure 409. Trend in Female employment in Italy



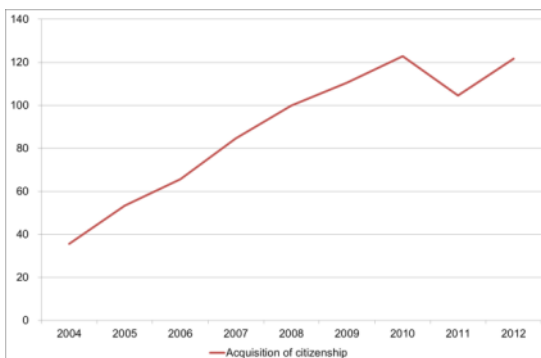
Source: Eurostat

Figure 410. Female participation to labour market in Italy



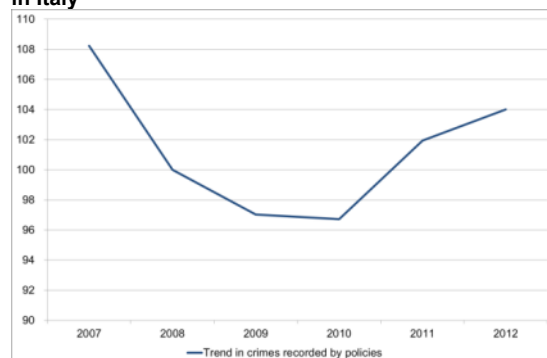
Indicators of social trust and openness of the country are shown in the following charts: the granting of citizenship has risen by 20% in the last 5 years and the crimes registered have also increased by 4% from 2008.

Figure 411. Acquisition of Citizenship in Italy



Source: Eurostat

Figure 412. Trend in crimes recorded by the police in Italy



The number of young people at risk of exclusion and poverty has also increased after the beginning of the crisis. In the same period, the number of young school leavers has decreased.

Figure 413. Young people at risk of poverty or exclusion in Italy

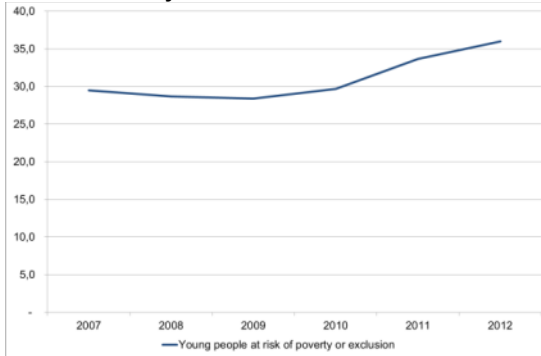
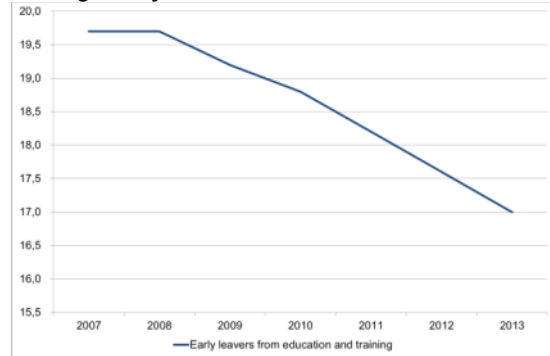


Figure 414. Early leavers from education and training in Italy



Source: Eurostat

The general trust indicator is high but, compared to other countries, the rate of individuals that claim to have strong familiar ties is slightly lower (83,8%). The number of both adults and young people that participate in voluntary activities and of those that participate in activities of charitable organizations is considerably high.

Table 43. Other trust indicators in Italy

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		83,8
Participation in informal voluntary activities	Adult	24,8
Participation in informal voluntary activities	Young	18,7
Participation in activities of charitable organisations		7,1

Source: Eurostat

In general, Italians show a high level of trust in society, and family is one of the strongest values.

Culture and Creativity

Despite the crisis the CCSs in Italy are increasing with the exception of last year, during which there is a halt in the contribution of CCSs to GDP, in general terms the sector has grown more than the general economy, reaching 1,56% of the GDP.

Figure 415. Trend of GDP in CCSs in Italy

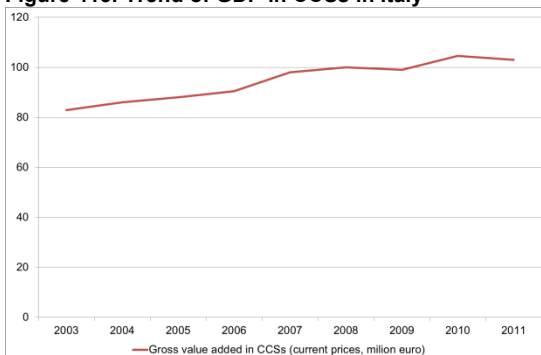
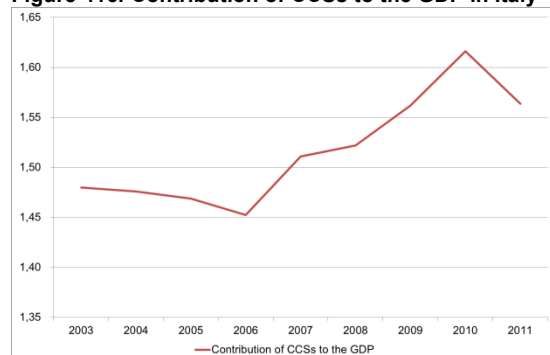


Figure 416. Contribution of CCSs to the GDP in Italy



Source: Eurostat

The above-mentioned process is not public driven. The following charts show the figures for public expenditure in culture and the trend in the public budget: the figures for CCSs stop growing in 2009.

Figure 417. Trend in public expenditure in Culture in Italy

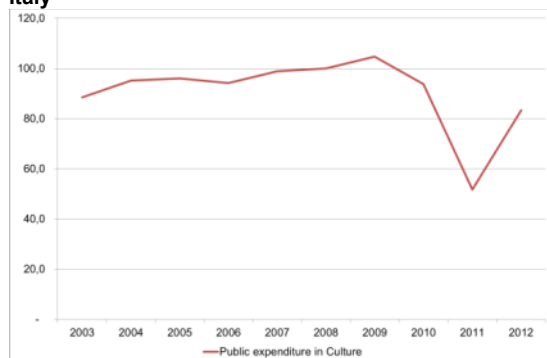
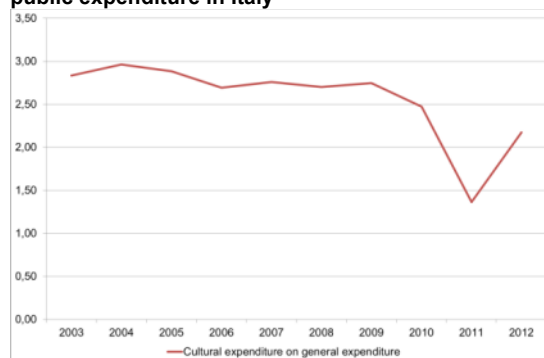


Figure 418. Public cultural expenditure on total public expenditure in Italy



Source: Eurostat

Demand and Supply of Culture and Creativity

Italy has 4588 museums (7 every 100.000 inhabitants) and is the country with the highest number of UNESCO cultural sites (46) in the world.

Table 44. Number of UNESCO cultural sites and museums in Italy

Description	Year	Number
UNESCO cultural sites	2013	46
Museums	2011	4.588

Source: Eurostat, EGMUS

Still, cultural participation is not very high: 24,5% of the population claims visiting cultural sites (7,5% claims to repeat the experience more than 4 times per year); 41,3% goes to the cinema (9,3% more than 4 times per year); 27,5% attends live performances (8,3% more than 4 times per year).

Table 45. Cultural behaviours in Italy

Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	72,5	19,2	5,1	2,1	1,1
Times going to the cinema	58,7	21,6	9,8	5,7	4,2
Visits to cultural sites	75,5	17,0	4,8	1,6	1,1

Source: Eurostat

Education

In Italy 23,4% of tertiary students are enrolled in culture-related studies: 9,4% in the Humanities; 6,8% in Architecture and building, 5,2% in the Arts and 2% in Journalism and information. Mts culture-related studies register a better trend than the general.

Figure 419. Trend in tertiary students in Italy

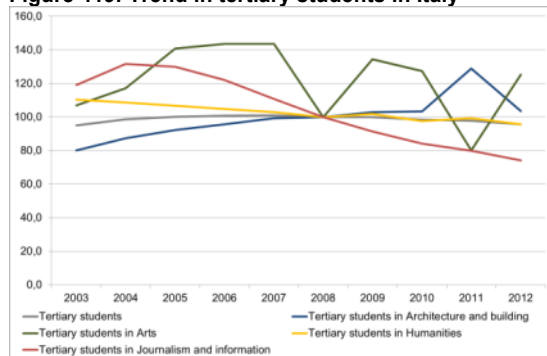
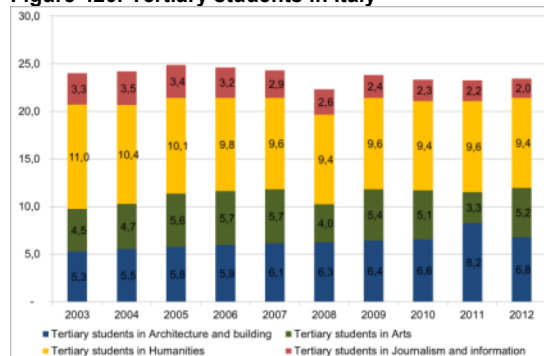


Figure 420. Tertiary students in Italy



Source: Eurostat

Employment and Young employment

The following charts show the trend of employed in the CCSs in relation to the general employment. Those employed in the CCSs represent 1,2% of the employed and young people represent 1%. The trend shows that professionals who work in the CCSs have a better performance rate than the rest, and this among both adults and young people.

Figure 421. Employment and young employment in Italy (Total and in CCSs)

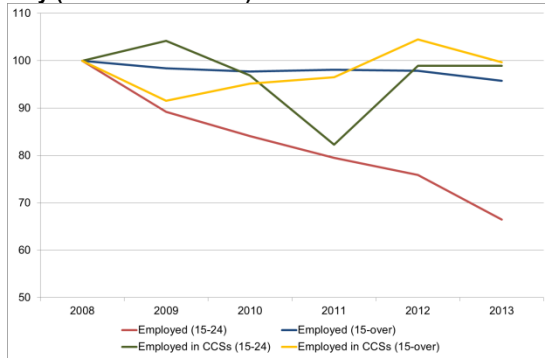
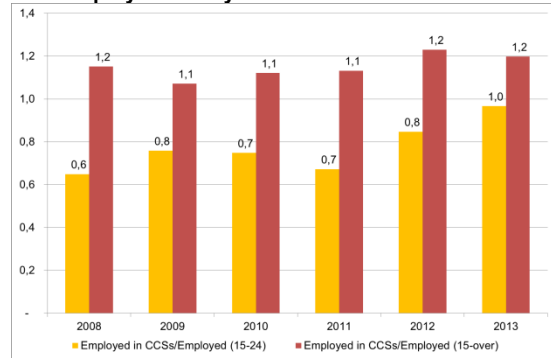


Figure 422. Composition of Employed in CCSs on total employed in Italy



Source: Eurostat

The following charts show the composition of employment in the CCSs and its trend in the last 6 years. All those employed in the CCSs register a better performance than those employed in other sectors, in general. The employed in the “Creative arts and entertainment” and in “Libraries, archives and museums” (NACE 90 and 91) represent 0,64% of the total employed and, as shown, the trend in those sectors registers a very good performance. The only sector in which figures show a loss of jobs is, like in many other countries, the “Publishing activities” sector (NACE 58) that represents 0,33% of the total employed in the CCSs.

Figure 423. Trend in Employment in CCSs for sector of activity in Italy

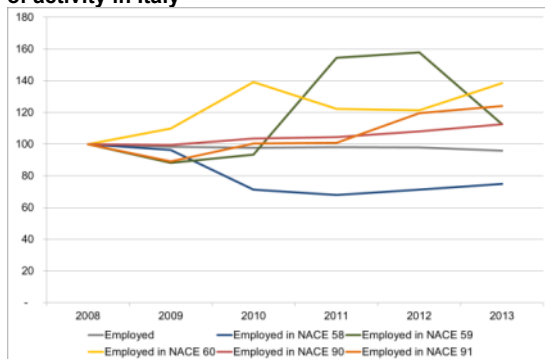
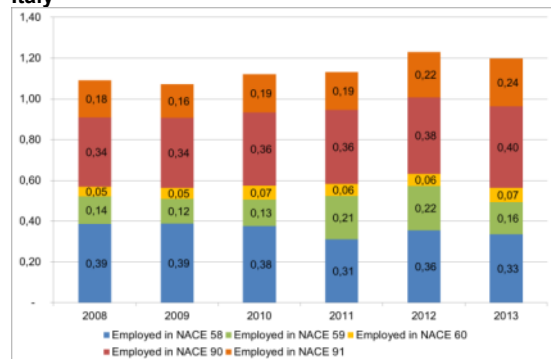


Figure 424. Composition of employed in CCSs in Italy



Source: Eurostat

The general trend as regards employment of young people is shown in the following charts. In 2013 the young employed in the CCSs represented 0,9% of the total employed in this sector and the rate is growing fast from an initial 0,7% in 2008. The sectors with the largest number of jobs are the “Creative arts and entertainment” (NACE 90) and “Publishing activities” (NACE 58) while the other sectors represent less than 0,4% of the total employed in the CCSs.

Figure 425. Trend in Employment in CCSs for sector of activity for young employed in Italy

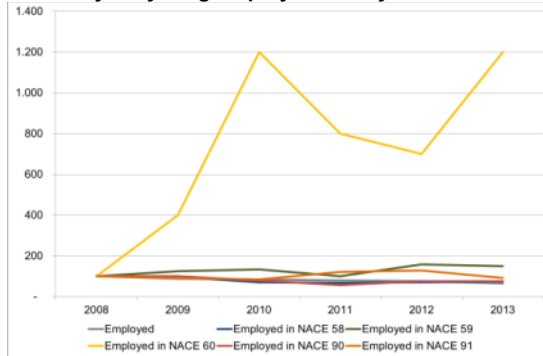
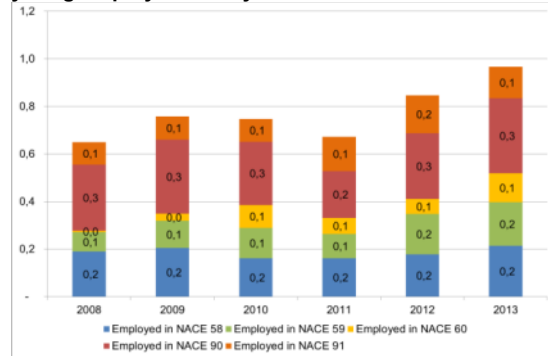


Figure 426. Composition of employed in CCSs for young employed in Italy



Source: Eurostat

ICT

In 2007 the growth of mobile phones registered a stop and, as the charts below seem to suggest, the mobile telephone market in Italy indeed has reached a level of saturation: in fact the number of new subscriptions per 100 inhabitants is 160 units. In the same 11 year period, fixed telephone subscriptions registered a decline of 8%; broadband reached 22,3% of the inhabitants and only 58,5% of individuals uses the Internet.

Figure 427. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Italy

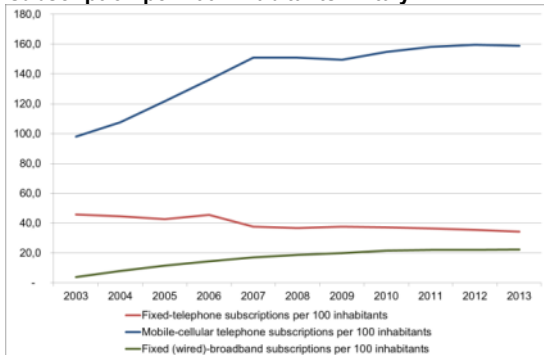
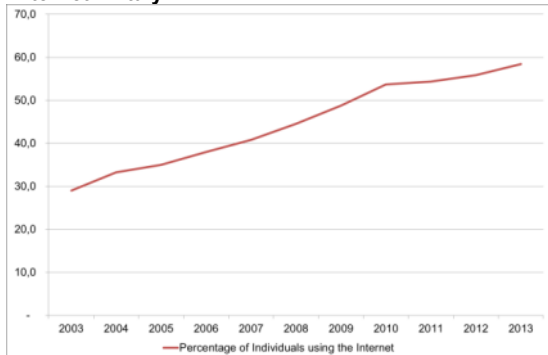


Figure 428. Percentage of Individuals using the Internet in Italy



Source: Eurostat

The employed in ICT represent 1,8% of the total labour force. The following charts show that the general trend is positive for the employed working in the “Computer programming” and “Information services” (NACE 62 and 63) sectors whereas it is negative for the “Telecommunications” sector (NACE 63). The highest number of those employed is registered in the “Computer programming” sector (NACE 62) with 1,1% of total employment; the “Information services” sector (NACE 63) is growing at a quite fast rate but represents only 0,3% of the total employed in the ICTs.

Figure 429. Trend in ICT Employment in Italy

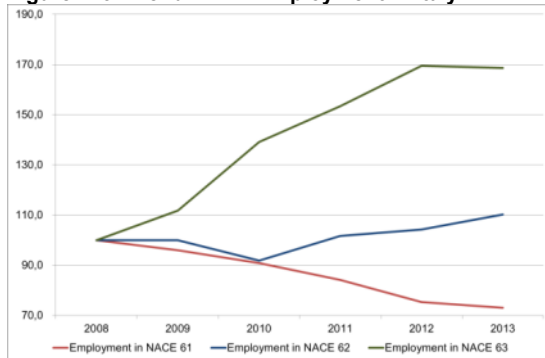
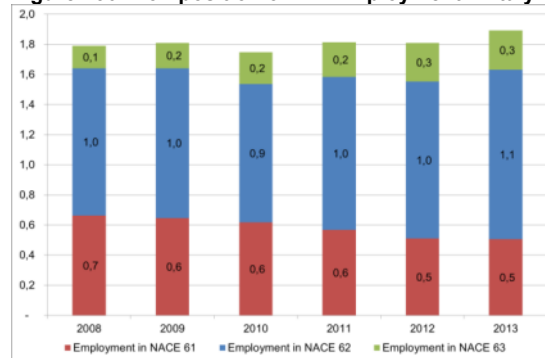


Figure 430. Composition of ICT Employment in Italy



Source: Eurostat

LATVIA

Latvia has been a member of the European Union since 2004. The total population of the country is 2,3 million. The trend in population is shown in the following charts: both labour force and population have decreased in the past 10 years and the same trend is followed by young people.

Figure 431. Trend in population in Latvia

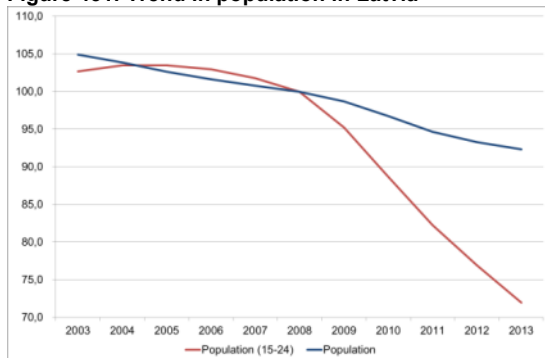
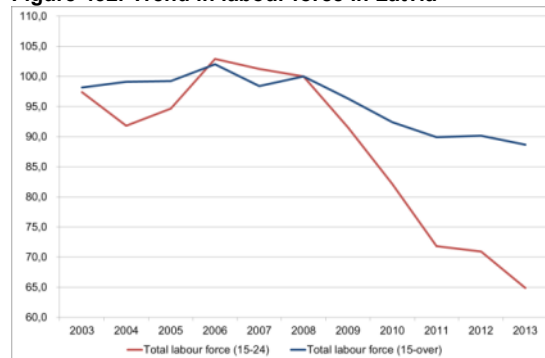


Figure 432. Trend in labour force in Latvia



Source: Eurostat

After a firm stop of GDP growth in 2009, with a figure 20% lower than that of 2008, the trend in GDP growth has changed and, at the end of the period analysed, is 10% higher than it was 2008. The economic growth of the country is not pushed by general public expenditure which, after the crisis, registered a cut of 7%.

Figure 433. Trend in GDP in Latvia

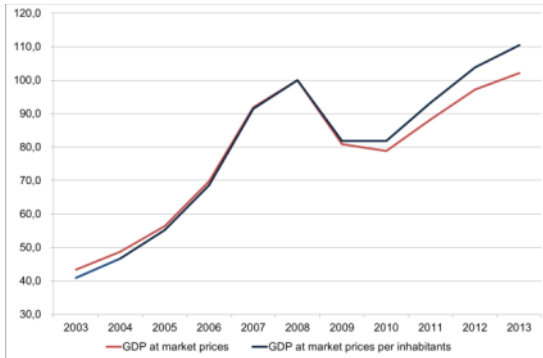
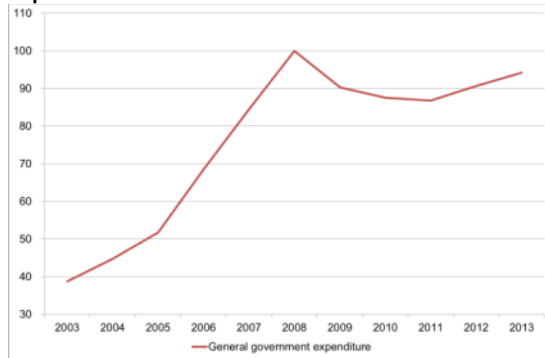


Figure 434. Trend in general government expenditure in Latvia



Source: Eurostat

The consequences of the crisis have befallen the employed: in 2008 employment fell by 20% and only after 2010 it has started to grow again. A similar trend is apparent for the self-employed who in 2013 have again registered figures as in 2008.

Figure 435. Trend in employment in Latvia

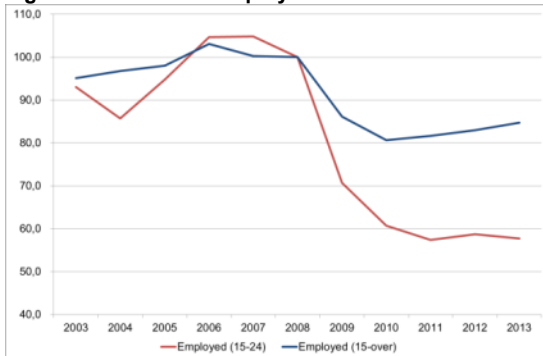
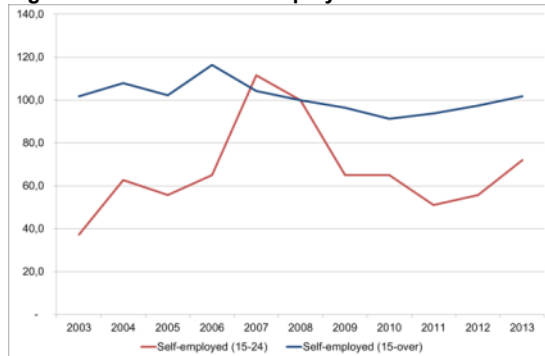


Figure 436. Trend in self-employment in Latvia



Source: Eurostat

Social environment

The women employed in Latvia have faced the crisis with a better performance than their male counterparts. And, indeed, the gender representation in labour market is quite even with a little over 50% of the employed being women. Still, the young population performs worse than the adult population.

Figure 437. Trend in Female employment in Latvia

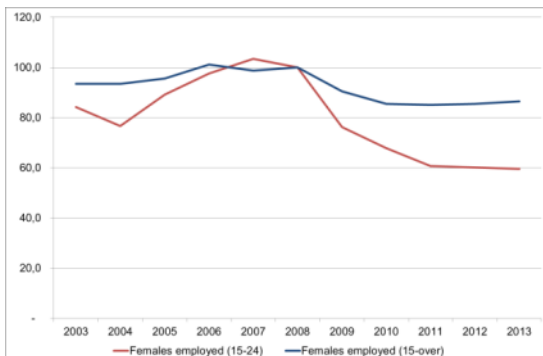
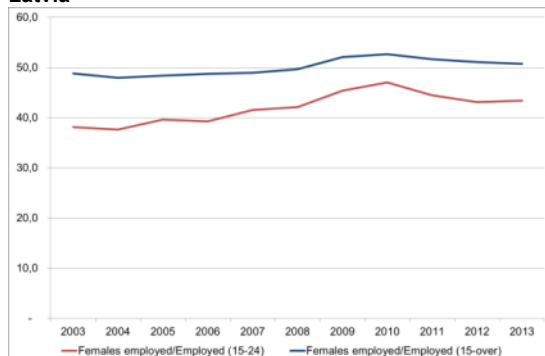


Figure 438. Female participation to labour market in Latvia



Source: Eurostat

Acquisition of citizenship has strongly decreased in the past 10 years; only in the last year available an increase has been registered. In the same period the crime situation has improved.

Figure 439. Acquisition of Citizenship in Latvia

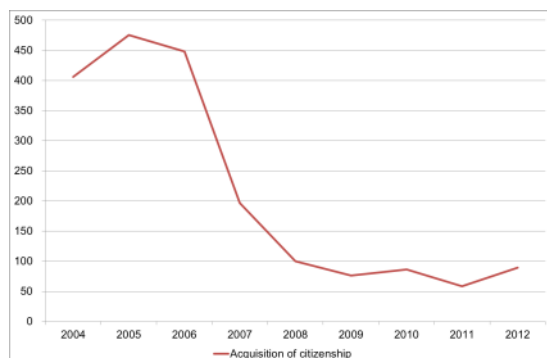
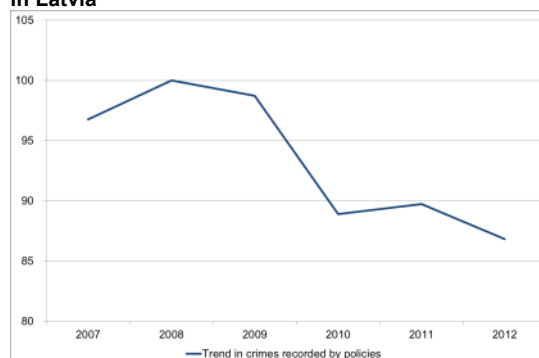


Figure 440. Trend in crimes recorded by the police in Latvia



Source: Eurostat

The social condition of the young population is worse than it was 5 years ago and the risk of poverty has increased while school inclusion has improved.

Figure 441. Young people at risk of poverty or exclusion in Latvia

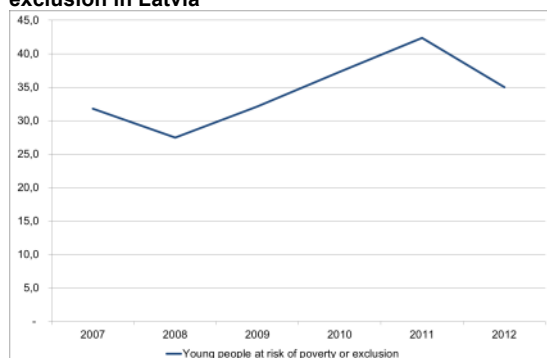
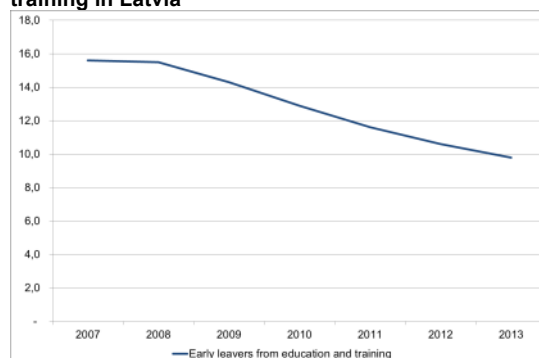


Figure 442. Early leavers from education and training in Latvia



Source: Eurostat

The social trust indicator is considerably high: 34% of adults participate in voluntary activities (31% of the young population) and family is a strong value for Latvians.

Table 46. Other trust indicators in Latvia

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		88,8
Participation in informal voluntary activities	Adult	34,3
Participation in informal voluntary activities	Young	31,1
Participation in activities of charitable organisations		2

Source: Eurostat

Culture and Creativity

In the last 5 years the performance of CCSs has not been positive. After a strong increase in the years before the crisis, in 2008 rates started to decrease reaching the levels of 2003. In the same way the contribution of CCSs to GDP has decreased and in 2010 it was at 1,65% of the general GDP.

Figure 443. Trend of GDP in CCSs in Latvia

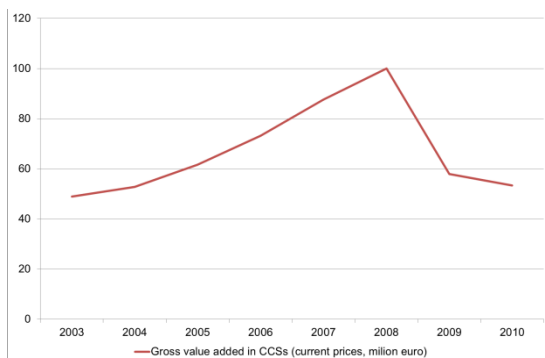
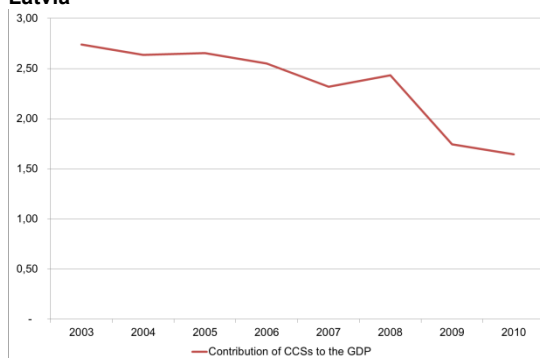


Figure 444. Contribution of CCSs to the GDP in Latvia



Source: Eurostat

The cultural sector has suffered deeply the effects of the crisis: in 2012 cultural expenditure was a 20% lower than in 2008 and public expenditure in culture dropped from 8,77% to 7,58%.

Figure 445. Trend in public expenditure in Culture in Latvia

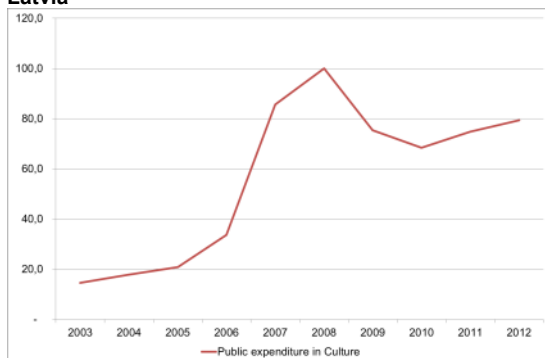
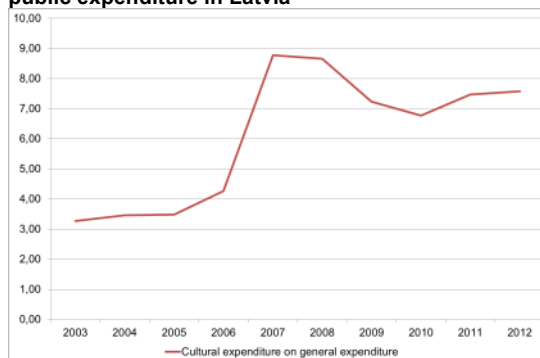


Figure 446. Public cultural expenditure on total public expenditure in Latvia



Source: Eurostat

Demand and Supply of Culture and Creativity

In Latvia there are 2 UNESCO cultural sites and 141 museums (6,22 per 100.000 inhabitants).

Table 47. Number of UNESCO cultural sites and museums in Latvia

Description	Year	Number
UNESCO cultural sites	2013	2
Museums	2011	141

Source: Eurostat, EGMUS

As regards demand, the table below shows that 37,5% of Latvians visit cultural sites, 24,9% go to the cinema and 43,3% attend live performances.

Table 48. Cultural behaviours in Latvia

Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	56,7	31,4	8,8	2,2	0,9
Times going to the cinema	75,1	16,0	5,5	2,2	1,2
Visits to cultural sites	-	27,7	7,0	2,1	0,7

Source: Eurostat

Education

The charts below show that the number of students enrolled in culture-related subjects has increased in the last 10 years: they represent 15,2% of the tertiary student population (Chart 448). In general though, after a period of increase between 2003 and 2008, the number of students in tertiary education has been decreasing steadily since 2009: in culture-related subjects the only to follow this general trend are the “Architecture and buildings” studies.

Figure 447. Trend in tertiary students in Latvia

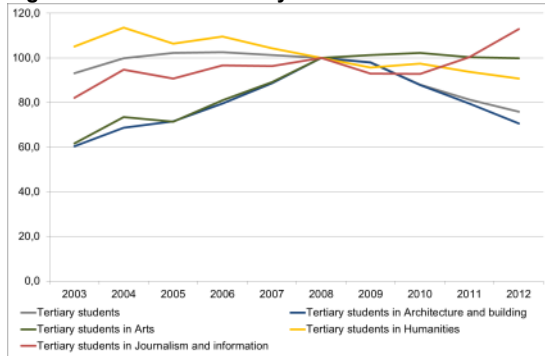
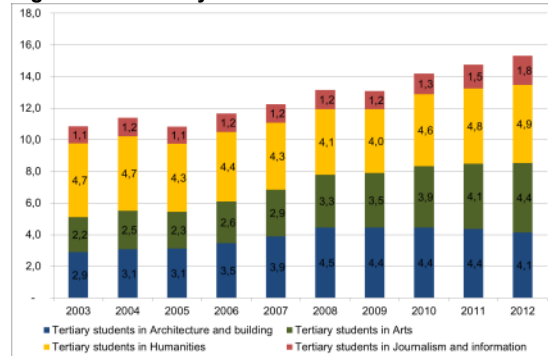


Figure 448. Tertiary students in Latvia



Source: Eurostat

Employment and Young employment

The employment situation in the CCSs is shown in the following charts: in 2013 those employed in the CCSs represent 2,1% of the total employed and 2,4% are young people. The general trend in the CCSs is quite similar to that of general employment. Especially among adults, the chart shows a slight better performance of employment in the CCSs.

Figure 449. Employment and young employment in Latvia (Total and in CCSs)

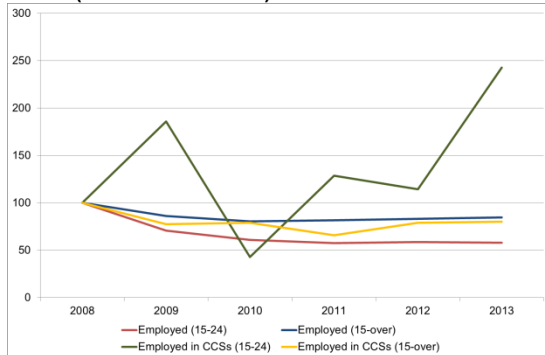
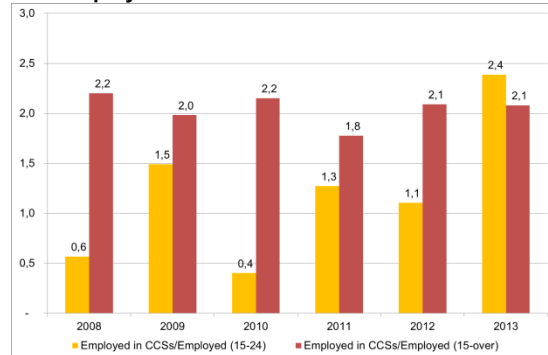


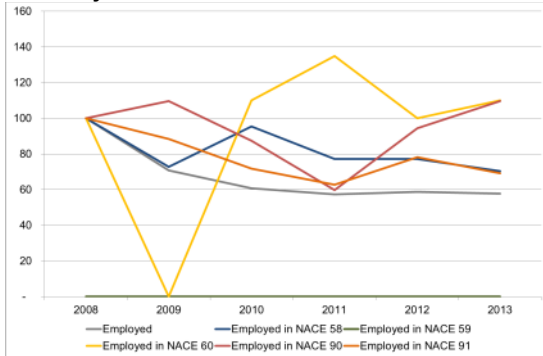
Figure 450. Composition of Employed in CCSs on total employed in Latvia



Source: Eurostat

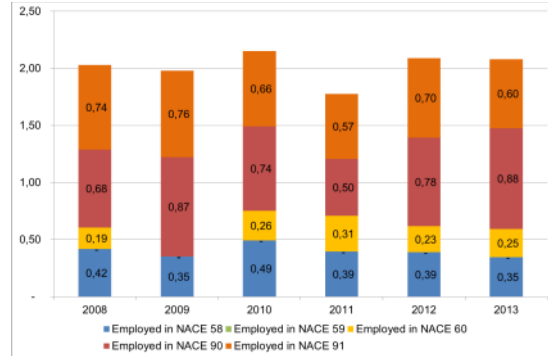
The following graphs show the employment trend in the CCSs compared with the general employment. The sector with the best performance is the “Creative arts and entertainment” sector (NACE 90) with 0,88% of the total population employed; the “Libraries, archives and museums” sector (NACE 91) represents 0,6% of the total employed and have a better performance than the general trend. The “Publishing activities” sector (NACE 58) has slightly decreased from an initial 0,42% of total employed to a final 0,35%; however, the trend registered is still better than the general one.

Figure 451. Trend in Employment in CCSs for sector of activity in Latvia



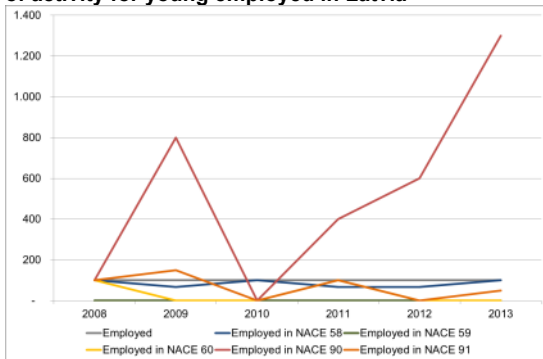
Source: Eurostat

Figure 452. Composition of employed in CCSs in Latvia



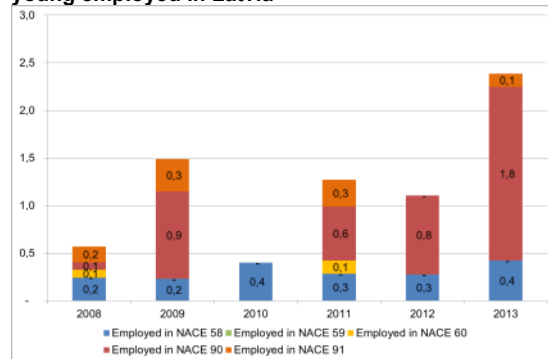
The lack of information makes it impossible to describe the situation for young people. The following charts only summarize the available data.

Figure 453. Trend in Employment in CCSs for sector of activity for young employed in Latvia



Source: Eurostat

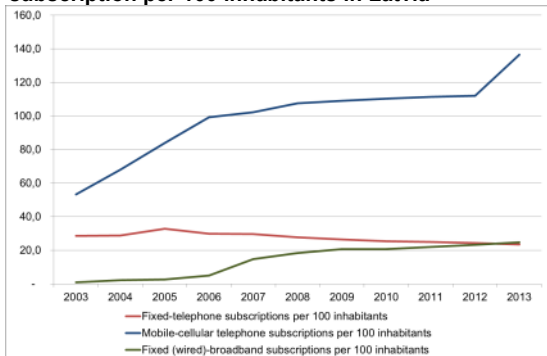
Figure 454. Composition of employed in CCSs for young employed in Latvia



ICT

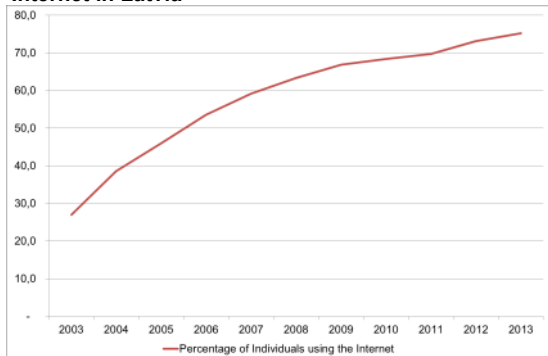
In 2013 over than 75% of the population used Internet and the number of mobile telephone subscriptions has increasing at a very fast rate from 2005. In the same period, the number of people with an access to broadband has reached 23% of the population whereas fixed telephone subscriptions have diminished.

Figure 455. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Latvia



Source: Eurostat

Figure 456. Percentage of Individuals using the Internet in Latvia



Employment in the ICTs represents about 2% of the general employment. The lack of data, especially for the “Information services” sector (NACE 63) makes it difficult to identify a general trend. Still, it is possible to say that the “Telecommunications” sector (NACE 61) is growing while the “Computer programming” sector (NACE 62) is decreasing: these trends follow a different path than the one registered in Europe for the same sectors.

Figure 457. Trend in ICT Employment in Latvia

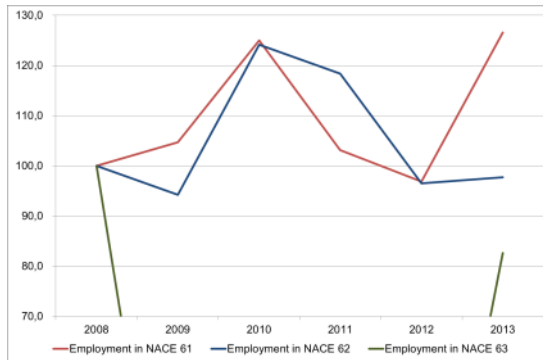
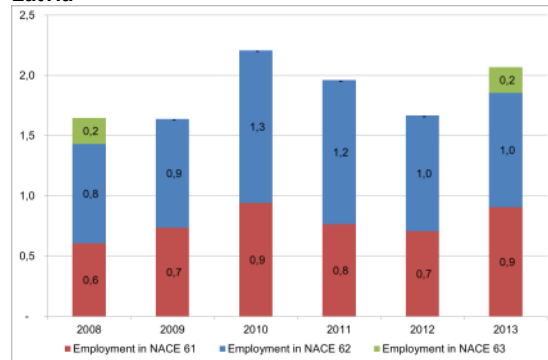


Figure 458. Composition of ICT Employment in Latvia



Source: Eurostat

LITHUANIA

Lithuania is a Member State of the European Union since 2004.

Its population is 3,3 million. The total population has decreased in the last decade by 7,5% and young people are decreasing faster than adults, with a loss of 16% over the same period. The labour force is slightly decreasing (-3,3%), but among young people the trend is more negative (-12,9%)

Figure 459. Trend in population in Lithuania

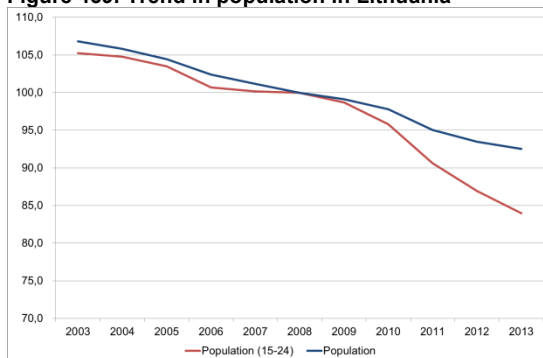
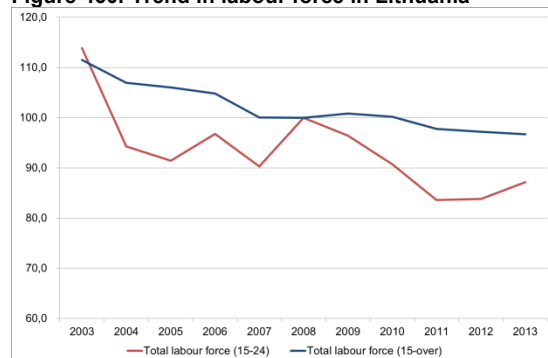


Figure 460. Trend in labour force in Lithuania



Source: Eurostat

After the crisis the GDP is again growing and with a more equal distribution; the public budget is quite stable, losing only 3% over the last 6 years.

Figure 461. Trend in GDP in Lithuania

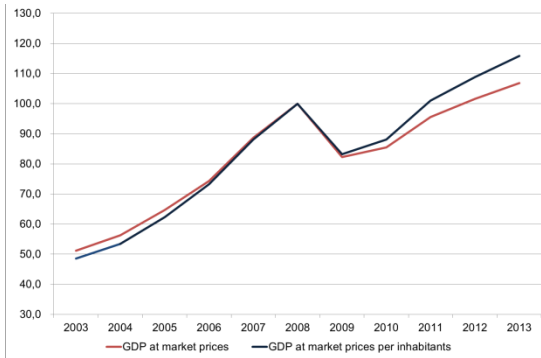
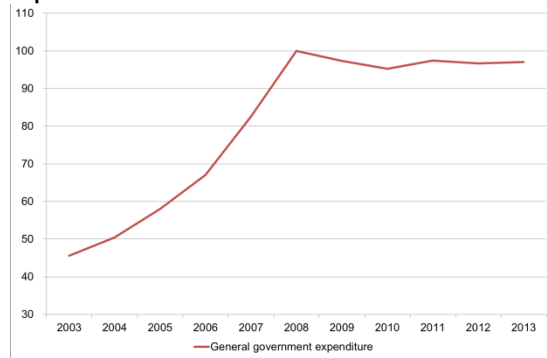


Figure 462. Trend in general government expenditure in Lithuania



Source: Eurostat

While the economic indicators are starting to grow again, the labour market, as shown in the charts below, is paying the consequences of the crisis: in the last 6 years employment fell by 10% (-21,5% among the young employed) and the self-employed have lost 6% (20% among the young employed).

Figure 463. Trend in employment in Lithuania

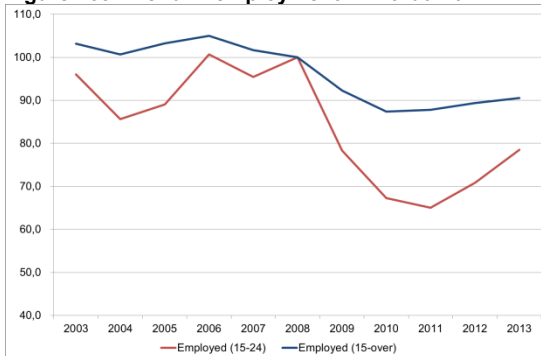
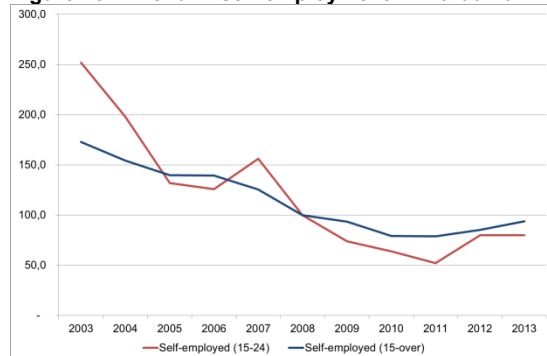


Figure 464. Trend in self-employment in Lithuania



Source: Eurostat

Social environment

The figures of employment relating to women show a better trend than the ones related to general employment. Indeed, in Lithuania there is a strong participation of women who represent over 50% of the labour force. The following charts show the trend as regards young women: these register -19,1% from 2013 and are about 43% of the total of the young employed.

Figure 465. Trend in Female employment in Lithuania

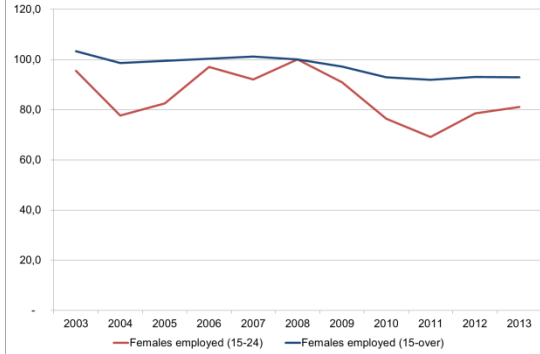
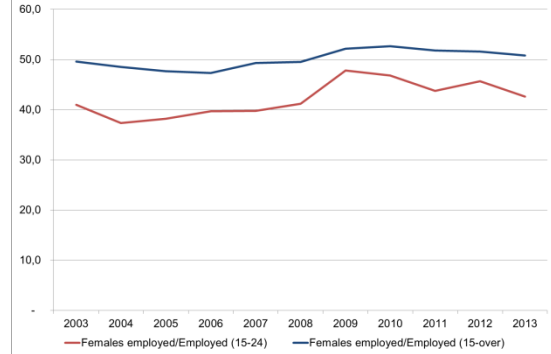


Figure 466. Female participation to labour market in Lithuania



Source: Eurostat

Lithuania registers a decrease of citizenship acquisition since 2004 while the crime rate has increased in the last 3 years.

Figure 467. Acquisition of Citizenship in Lithuania

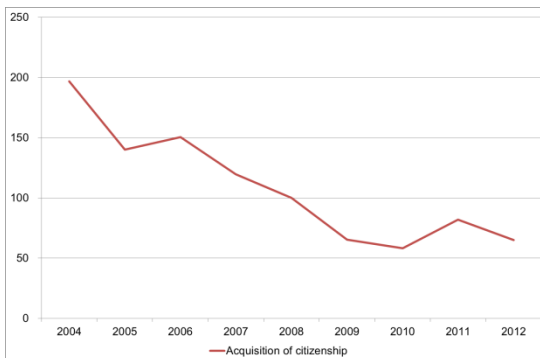
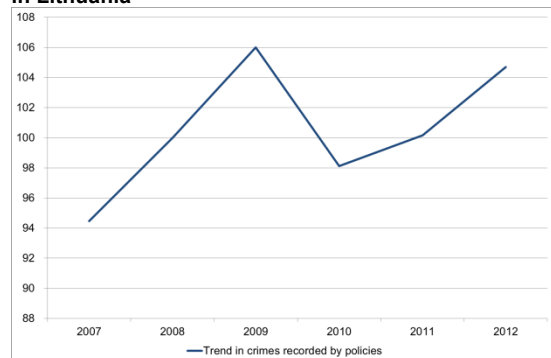


Figure 468. Trend in crimes recorded by the police in Lithuania



Source: Eurostat

33,4% of young people are at risk of exclusion or poverty but the early school leavers have decreased by 6,3%.

Figure 469. Young people at risk of poverty or exclusion in Lithuania

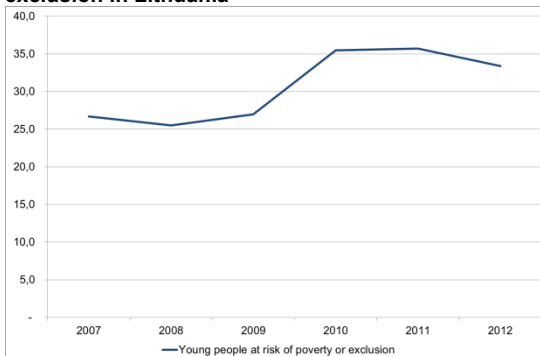
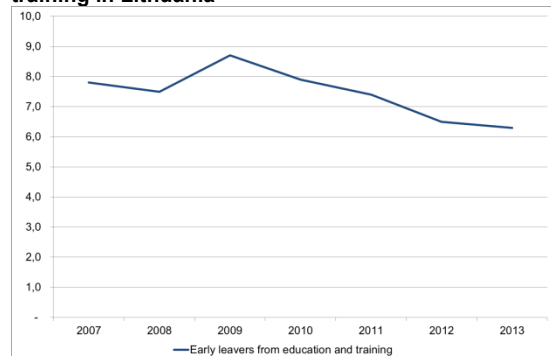


Figure 470. Early leavers from education and training in Lithuania



Source: Eurostat

The family trust indicator in Lithuania is very high and it there is a high level of general trust in the country: 13,7% of adults declare to participate in voluntary activities (11,7% among the young) and 94,4% of the population trusts its closest relations.

Table 49. Other trust indicators in Lithuania

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		94,4
Participation in informal voluntary activities	Adult	13,7
Participation in informal voluntary activities	Young	11,7
Participation in activities of charitable organisations		1,8

Source: Eurostat

Culture and Creativity

The CCSs have, in the last 6 years, registered a negative trend: from 2003 the GDP in the CCSs registered a growth of approximately 33% and, since 2008, it has just slightly decreased by about 4%. In the same way, the contribution to the general economy is now lower than it was in 2008 and the trend is negative. In 2011 the contribution of the CCSs to GDP was 1,2%.

Figure 471. Trend of GDP in CCSs in Lithuania

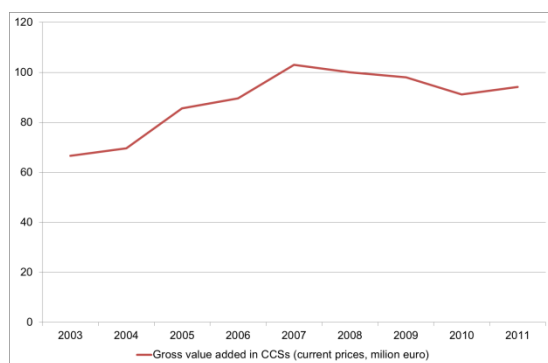
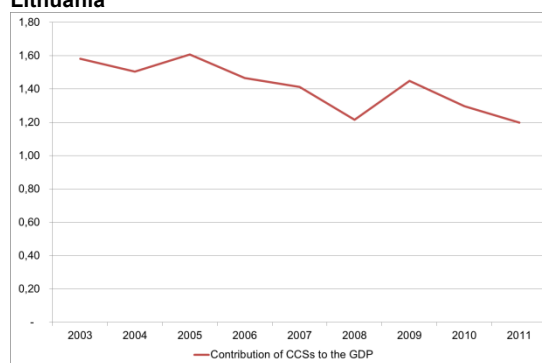


Figure 472. Contribution of CCSs to the GDP in Lithuania



Source: Eurostat

From 2008 public expenditure in culture has strongly decreased losing more than 25% of the budgetary allocation to culture: the total budget dedicated to culture is now at 4,1% of the general budget, 1,2% lower than it was in 2008.

Figure 473. Trend in public expenditure in Culture in Lithuania

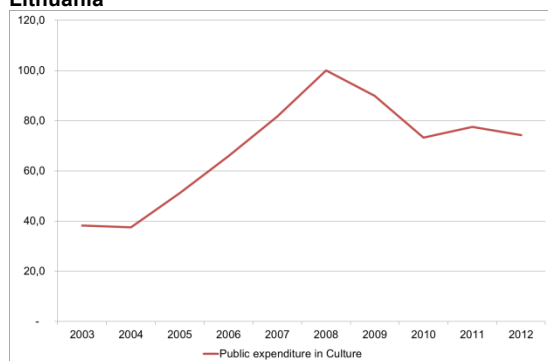


Figure 474. Public cultural expenditure on total public expenditure in Lithuania



Source: Eurostat

Demand and Supply of Culture and Creativity

The only data available to describe the cultural supply is the number of UNESCO cultural sites: in Lithuania there are 4. Participation in cultural life is strong for the performing arts sector and low for heritage.

Table 50. Number of UNESCO cultural sites in Lithuania

Description	Year	Number
UNESCO cultural sites	2013	4

Source: Eurostat, EGMUS

30,1% of the population declares visiting cultural sites (7% more than 4 times per year); 25,8% goes to the cinema (7,6% more than 4 times per year) and 45,7% attends live performances (12,5% more than 4 times per year).

Table 51. Cultural behaviours in Lithuania

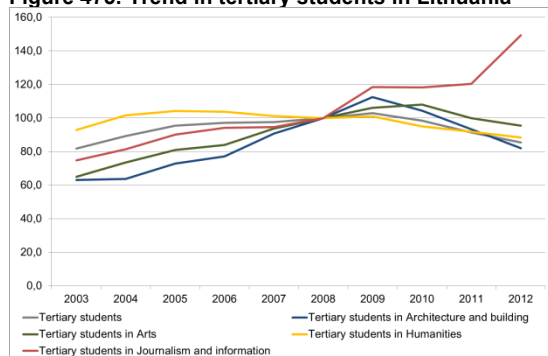
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	54,3	33,2	8,6	2,7	1,2
Times going to the cinema	74,2	18,2	4,7	1,8	1,1
Visits to cultural sites	69,9	23,0	5,1	1,2	0,8

Source: Eurostat

Education

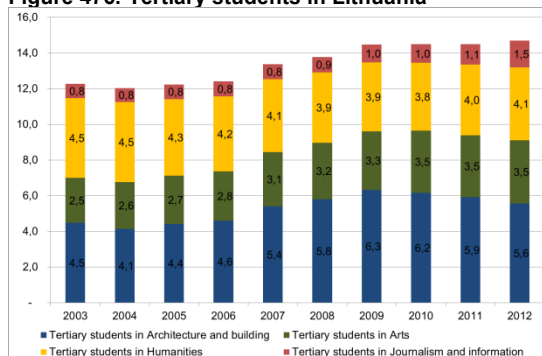
In the last 10 years, despite the general decreasing trend, education in culture-related subjects registers a growing trend. The highest number is that of students in Architecture and building (5,6% of the total student population) followed by students in the Humanities (4,1%) and in the Arts (3,5%). Students in Journalism and information are in the last position (1,5%) but have a faster growth rate than the other sectors.

Figure 475. Trend in tertiary students in Lithuania



Source: Eurostat

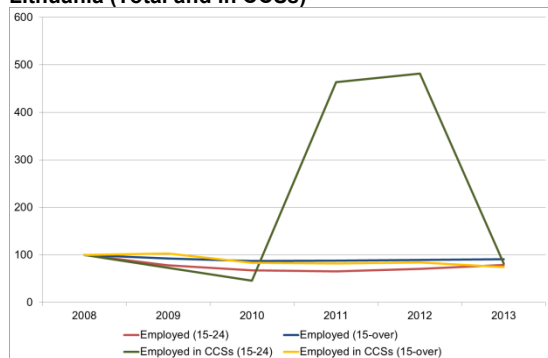
Figure 476. Tertiary students in Lithuania



Employment and Young employment

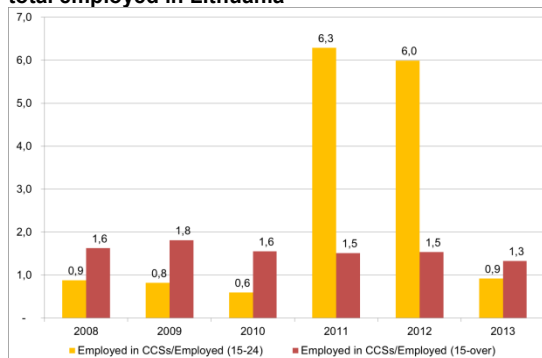
Due to the lack of information it is difficult to identify a trend as regards employment in the CCSs. The following charts show the lack of indicators for the general population.

Figure 477. Employment and young employment in Lithuania (Total and in CCSs)



Source: Eurostat

Figure 478. Composition of Employed in CCSs on total employed in Lithuania



ICT

In 2013, 22% of the population had access to broadband exceeding fixed telephone subscriptions and the number of mobile telephone per inhabitants was, instead, at 1,5; 68,5% of population used the Internet.

Figure 479. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Lithuania

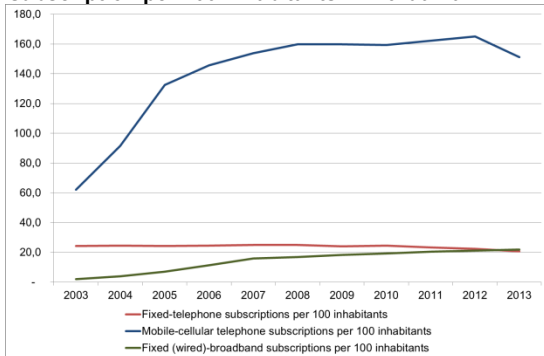
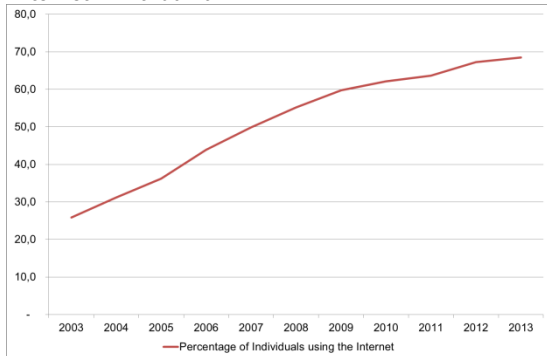


Figure 480. Percentage of Individuals using the Internet in Lithuania



Source: Eurostat

The following charts show that, due to the lack of data, also for the ICTs it is difficult to identify a general trend. Generally speaking it is possible to argue that employment in the “Telecommunications” sector (NACE 61) is decreasing and that in the “Computer programming” sector (NACE 62) it has grown until 2012 but is now decreasing. Employment in ICTs is about 1,3% of total employment although there is no available data for the “Information services” sector (NACE 63) and, consequently, the statement is relative.

Figure 481. Trend in ICT Employment in Lithuania

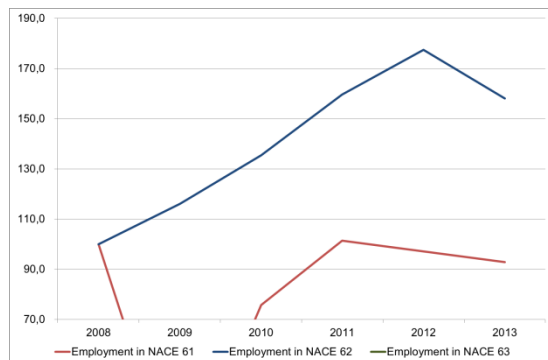
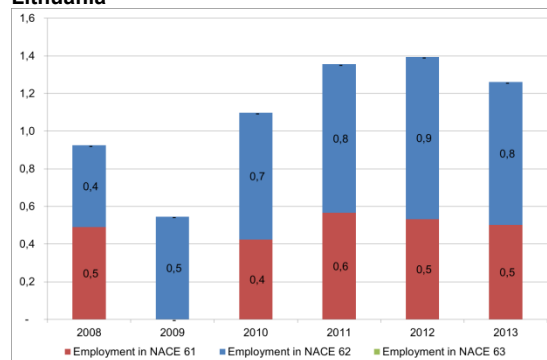


Figure 482. Composition of ICT Employment in Lithuania



Source: Eurostat

LUXEMBOURG

Luxemburg was one of the founders of the European Union in 1952.

Its population in 2013 was 537.000 inhabitants with a growing trend for both adults and young people. The labour force is consequently growing, except for young people.

Figure 483. Trend in population in Luxembourg

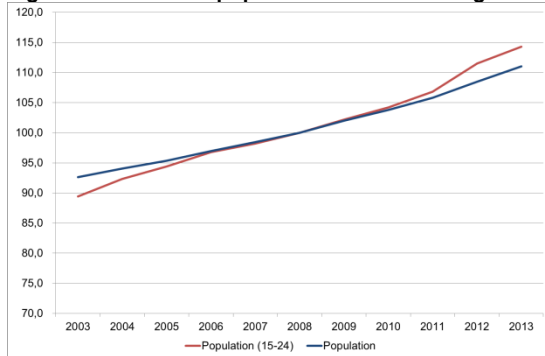
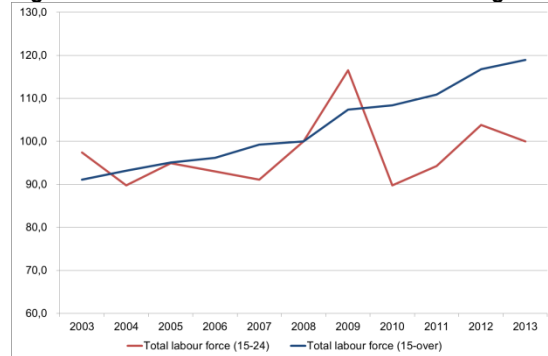


Figure 484. Trend in labour force in Luxembourg



Source: Eurostat

The crisis has affected Luxembourg less than it has affected other countries: after a 2 year slight decrease, GDP is growing again and the differences between the GDP at market price and per inhabitants is increasing the gap. In the same period the public expenditure has increased faster than GDP.

Figure 485. Trend in GDP in Luxembourg

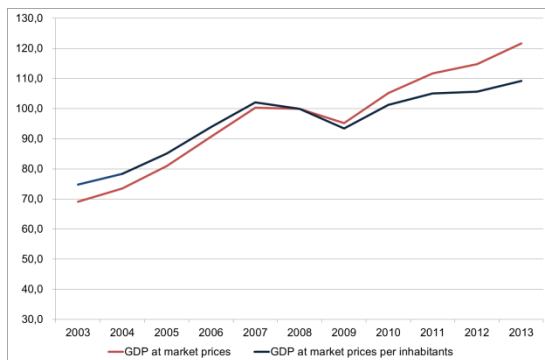
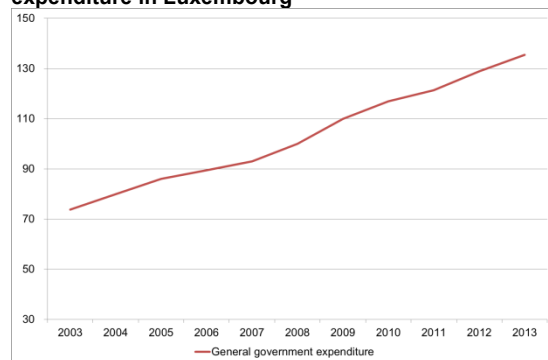


Figure 486. Trend in general government expenditure in Luxembourg



Source: Eurostat

The crisis in Luxembourg has not affected employment: both for employed and self-employed the market is growing although for the young employment is growing at a slower rate.

Figure 487. Trend in employment in Luxembourg

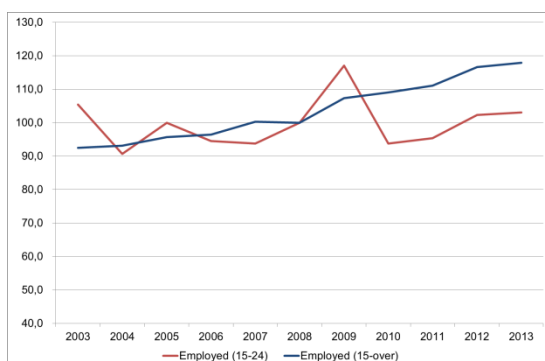
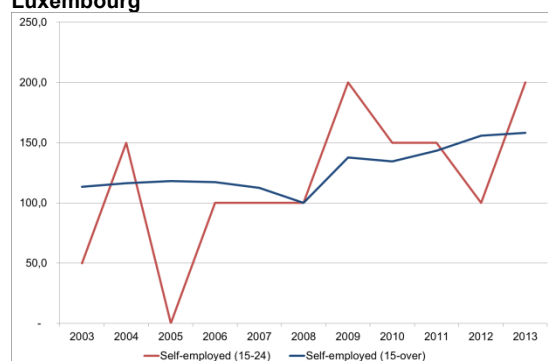


Figure 488. Trend in self-employment in Luxembourg



Source: Eurostat

Social environment

The participation of women in the labour market is at 44% (as regards young people it is impossible to identify a trend given the small statistical sample available).

Figure 489. Trend in Female employment in Luxembourg

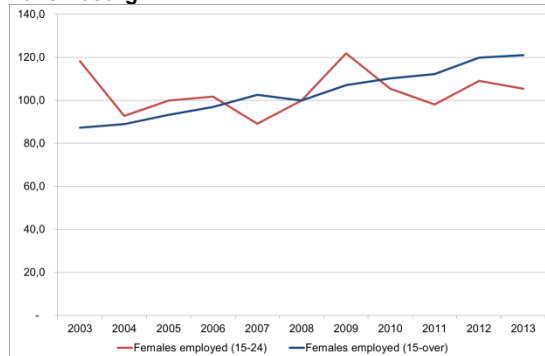
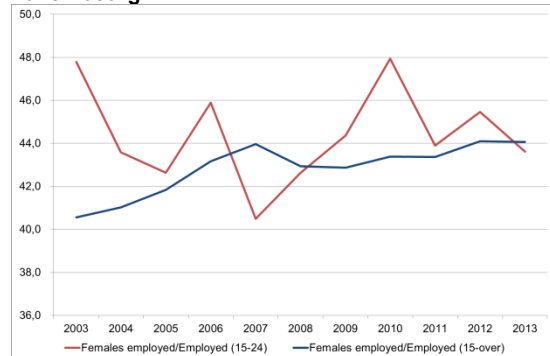


Figure 490. Female participation to labour market in Luxembourg



Source: Eurostat

While, as of 2008, the number of new citizens is growing faster than before, the number of recorded crimes has increased by 30%.

Figure 491. Acquisition of Citizenship in Luxembourg

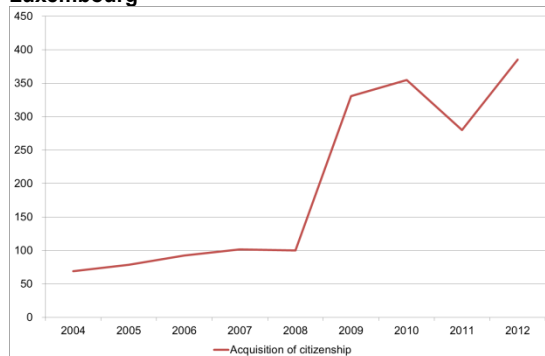
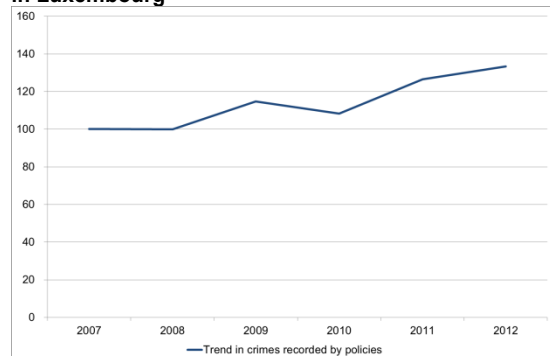


Figure 492. Trend in crimes recorded by the police in Luxembourg



Source: Eurostat

The crisis has affected young people and the number of those at risk of poverty or exclusion is increasing although the education system seems to be effective because the dropout rate is diminishing.

Figure 493. Young people at risk of poverty or exclusion in Luxembourg

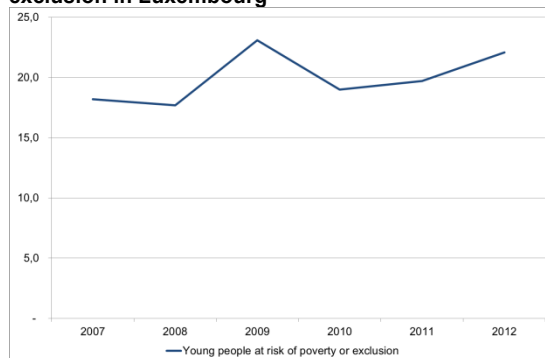
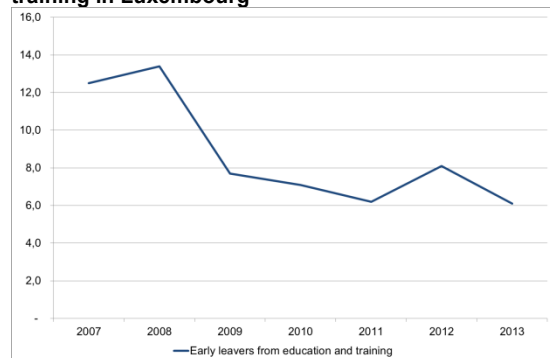


Figure 494. Early leavers from education and training in Luxembourg



Source: Eurostat

Society in Luxembourg is organized around strong family and closer relations ties. Indeed, it is possible to argue that people are generally generous and that general trust is high. People that participate in voluntary activities are 36,9% among adults and 30,8% among young people; in addition, 17% of individuals declare they participate in activities by charitable organizations.

Table 52. Other trust indicators in Luxembourg

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		90,3
Participation in informal voluntary activities	Adult	36,9
Participation in informal voluntary activities	Young	30,8
Participation in activities of charitable organisations		17

Source: Eurostat

The contribution of the CCSs to the general economy has grown in the last 6 years but in GDP percentage points it is quite stable: in 2012, the GDP in CCSs was 1,04%.

Culture and Creativity in Luxembourg

Figure 495. Trend of GDP in CCSs in Luxembourg

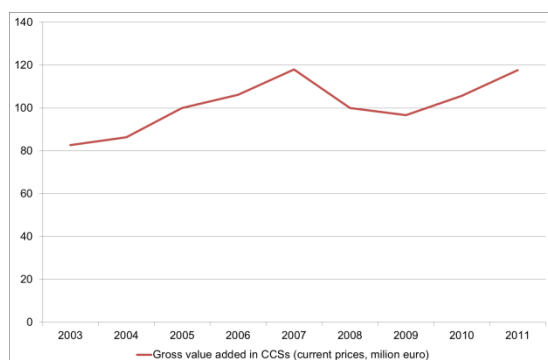
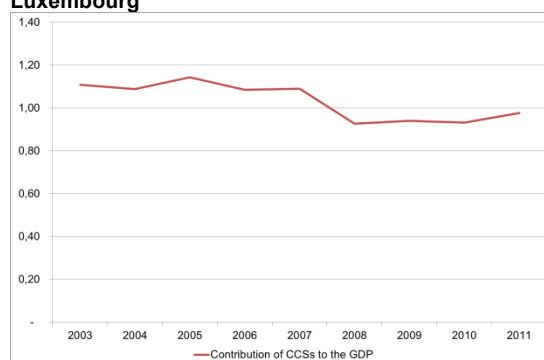


Figure 496. Contribution of CCSs to the GDP in Luxembourg



Source: Eurostat

The same trend as that shown in the above charts is shown also in the ones below: whereas public expenditure in culture has grown since 2007, the percentage of public expenditure dedicated to culture has, over the same period, decreased.

Figure 497. Trend in public expenditure in Culture in Luxembourg

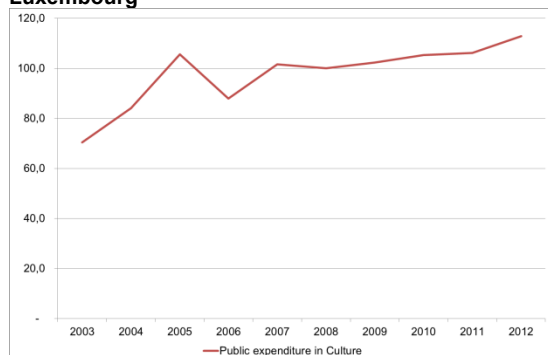
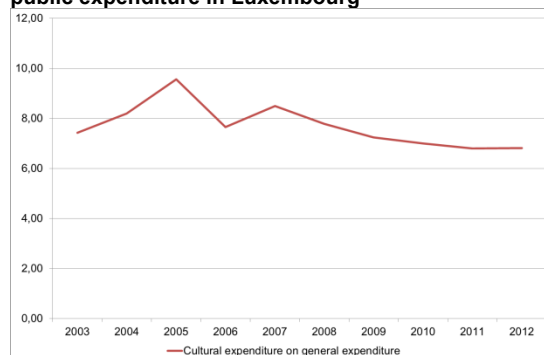


Figure 498. Public cultural expenditure on total public expenditure in Luxembourg



Source: Eurostat

Demand and Supply of Culture and Creativity

In Luxembourg there are 47 museums (7,8 per 100.000 inhabitants) and one UNESCO cultural site.

Table 53. Number of UNESCO cultural sites and museums in Luxembourg

Description	Year	Number
UNESCO cultural sites	2013	1
Museums	2011	47

Source: Eurostat, EGMUS

The population has an active cultural behaviour: 51,4% visit cultural sites (21,7% repeat the experience more than 4 times per year); 50,7% go to the cinema (30% more than 4 times per year) and 53% attend live performances (23,6% more than 4 times per year).

Table 54. Cultural behaviours in Luxembourg

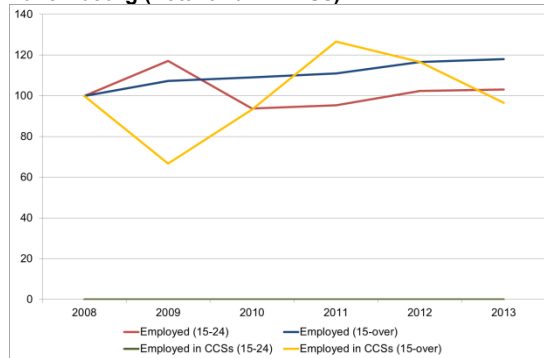
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	47,0	29,3	13,2	6,3	4,1
Times going to the cinema	49,3	20,8	12,0	8,8	9,2
Visits to cultural sites	48,6	29,7	12,1	4,7	4,9

Source: Eurostat

Employment and Young employment

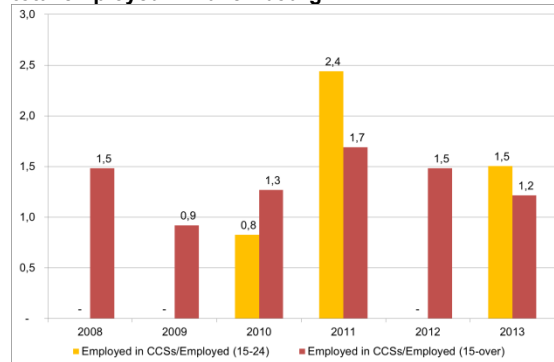
Due to the lack of data, the trend in employment is difficult to describe: the following charts show the data available for adults and young people.

Figure 499. Employment and young employment in Luxembourg (Total and in CCSs)



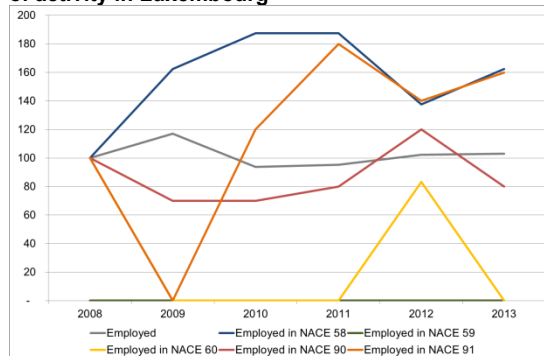
Source: Eurostat

Figure 500. Composition of Employed in CCSs on total employed in Luxembourg



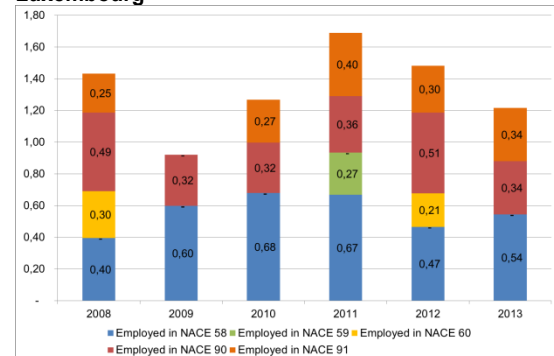
A fortiori the same problem of lack of data is registered for the single sectors in the CCSs.

Figure 501. Trend in Employment in CCSs for sector of activity in Luxembourg



Source: Eurostat

Figure 502. Composition of employed in CCSs in Luxembourg



ICT

93,8% of the population uses the Internet: the highest rate in Europe. The Luxembourgish have 140 mobile subscriptions per 100 inhabitants; broadband reaches 33% of the population and fixed telephone subscriptions are considerably high (50,5%) with respect to the European average.

Figure 503. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Luxembourg

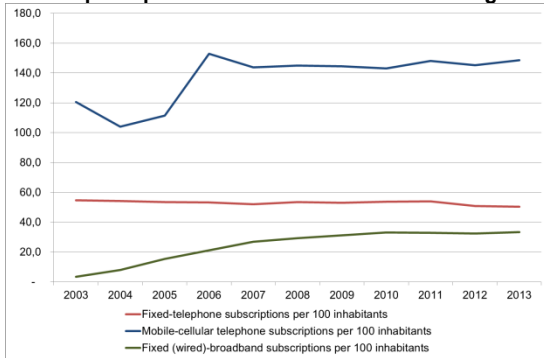
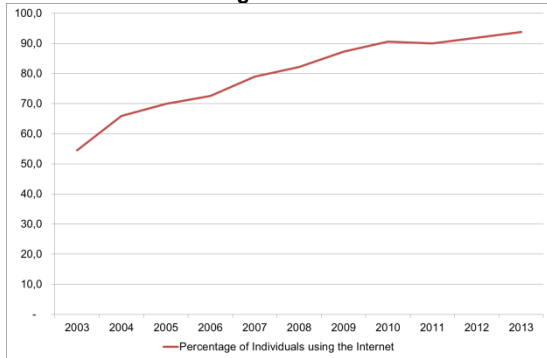


Figure 504. Percentage of Individuals using the Internet in Luxembourg



Source: Eurostat

Employment in the ICTs is growing faster than in other countries: the “Telecommunication” sector (NACE 61) is the largest sector in terms of the employed (1,6% in 2013) and has been stable in the last 6 years; the “Computer programming” sector (NACE 62) is growing faster than the “Telecommunication” sector and represents 1,2% of the total employed. Since the only available data is for in 2012 it is impossible to comment on the employment trends in the “Information services” sector (NACE 63).

Figure 505. Trend in ICT Employment in Luxembourg

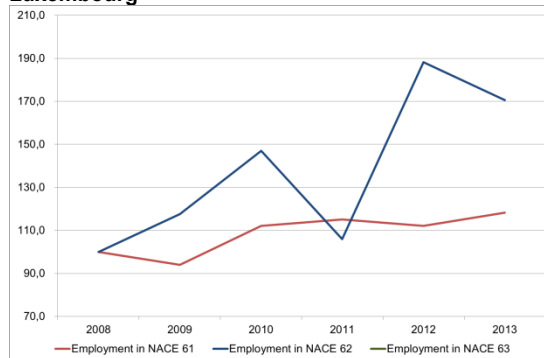
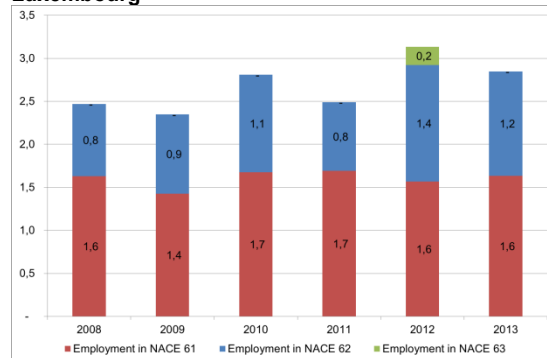


Figure 506. Composition of ICT Employment in Luxembourg



Source: Eurostat

MALTA

Malta is an island of 420.000 inhabitants and a member of the European Union from 2004.

In the last 10 years, the population has increased and labour force follows the same trend. At the same time, the young population, and consequently the young labour force, are decreasing.

Figure 507. Trend in population in Malta

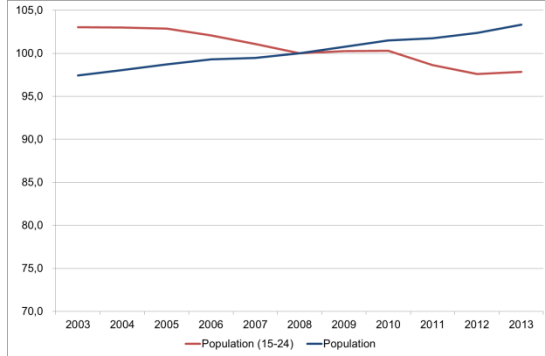
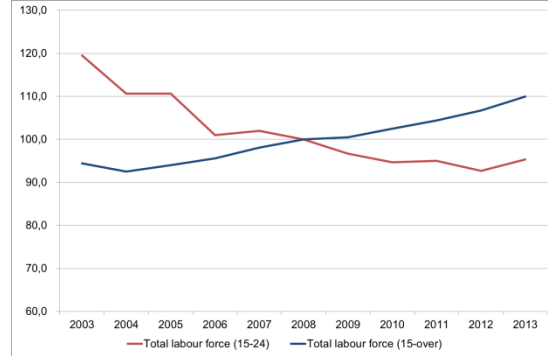


Figure 508. Trend in labour force in Malta



Source: Eurostat

The crisis has had a minor effect on the Maltese economy. The GDP and the public expenditure had a recess in 2009 and then started to grow again in 2010. In the last 6 years, the GDP registered a growth of 20,5% and public expenditure a 22,3%.

Figure 509. Trend in GDP in Malta

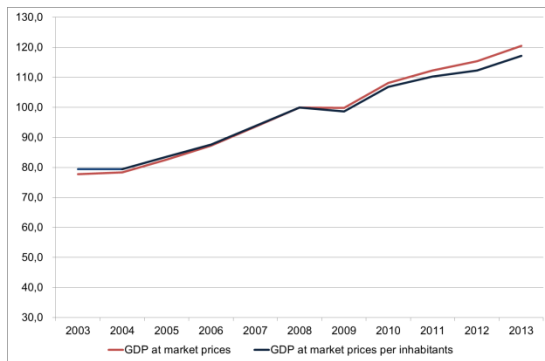
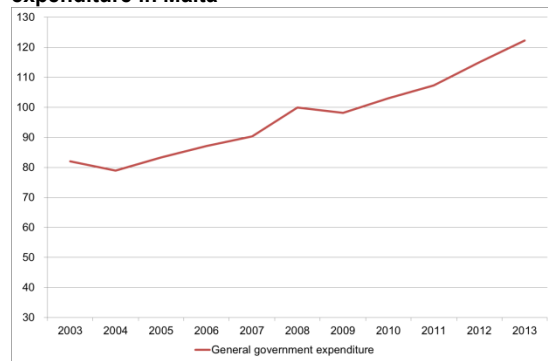


Figure 510. Trend in general government expenditure in Malta



Source: Eurostat

The economic crisis did not have a significant effect on the labour market, as both employment and self-employment have increased after 2008: employment registered an increase of 9,6%, while self-employment registered a 11,5%.

Figure 511. Trend in employment in Malta

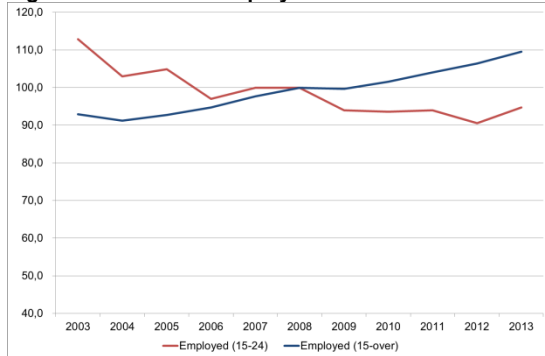
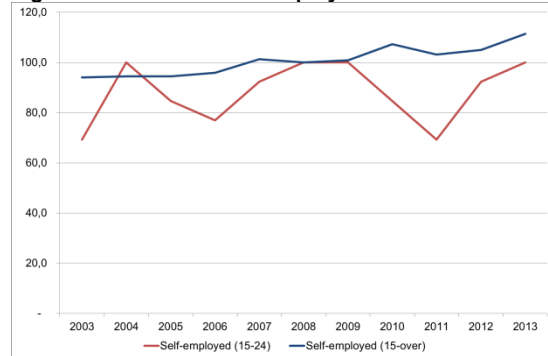


Figure 512. Trend in self-employment in Malta



Source: Eurostat

Social environment

Like in many other countries, women's employment is growing faster than the general figures. Consequently, in the last 10 years the difference in labour participation by men and

women has become less. In 2013, women were 37,3% of total employed, compared to the 30,4% registered in 2003. The participation of young women in the labour market is also higher than adult women's participation, as 46,6% of the total young employed are women.

Figure 513. Trend in Female employment in Malta

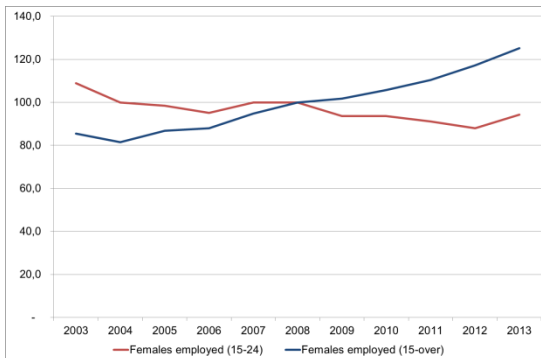
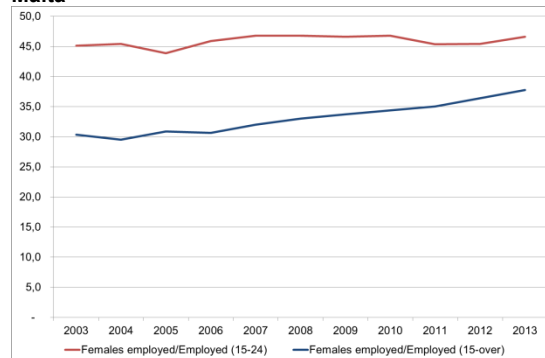


Figure 514. Female participation to labour market in Malta



Source: Eurostat

Acquisition of Maltese citizenship has considerably increased since 2006. On the other hand, as from 2009 the criminal activity recorded has risen, after a period of decrease in 2007-2008.

Figure 515. Acquisition of Citizenship in Malta

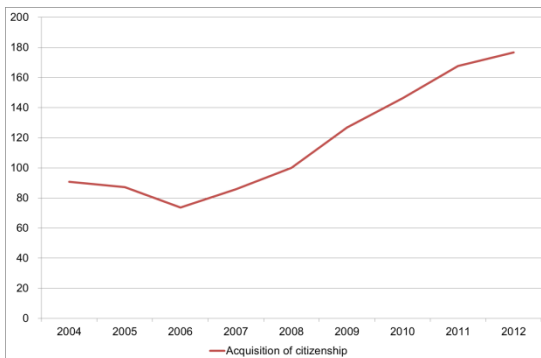
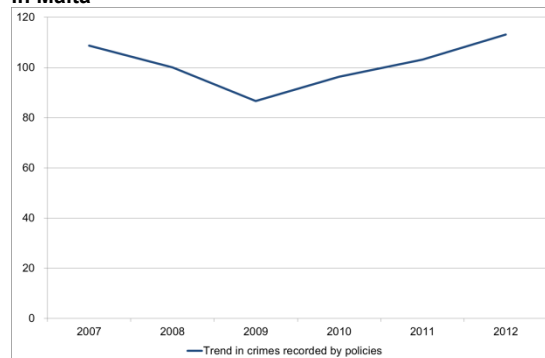


Figure 516. Trend in crimes recorded by the police in Malta



Source: Eurostat

The crisis has particularly affected the young population in Malta. The following data show that, within the same period, while the risk of poverty and exclusion is rising, the social policies on education are quite effective and that, consequently, the number of early school leavers is diminishing.

Figure 517. Young people at risk of poverty or exclusion in Malta

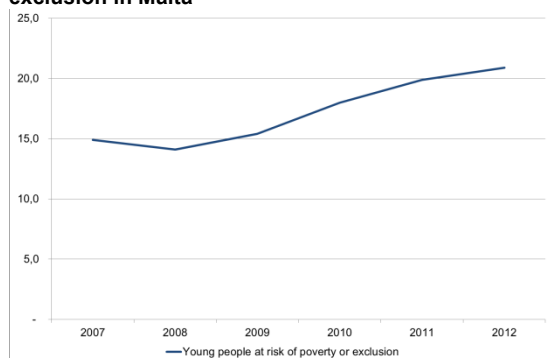
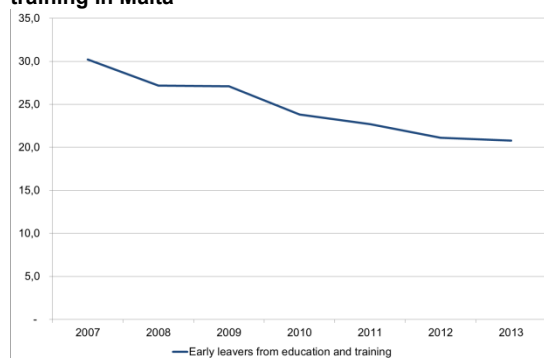


Figure 518. Early leavers from education and training in Malta



Source: Eurostat

Maltese people are very inclusive and 94,9% of them declare to trust in family and close friends. Besides, the participation to voluntary and charitable activities is more than 10,5% among the young and 12,2% among adults.

Table 55. Other trust indicators in Malta

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		94,9
Participation in informal voluntary activities	Adult	12,2
Participation in informal voluntary activities	Young	10,5
Participation in activities of charitable organisations		10,5

Source: Eurostat

Culture and Creativity

The CCSs have strongly suffered the consequences of the economic crisis. The following charts show that the contribution to GDP by the CCSs has gone down in the last 6 years whereas the growth of GDP, from 2008, has been stable. As can be seen, the total contribution of the CCSs to the general economy is 7,7%, which can be considered a very high rate.

Figure 519. Trend of GDP in CCSs in Malta

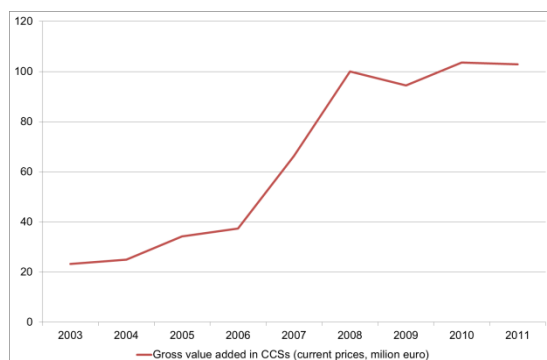
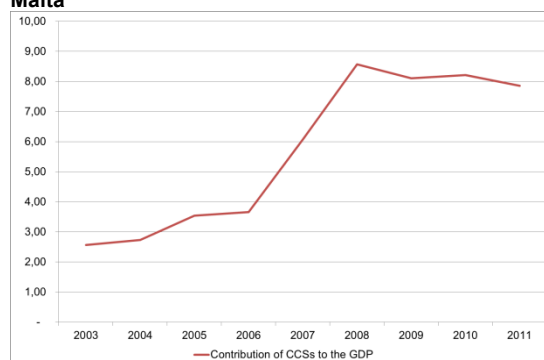


Figure 520. Contribution of CCSs to the GDP in Malta



Source: Eurostat

However, public expenditure on culture has increased and reached a 3,85% of general expenditure in 2013. This positive evolution is partly due to the fact that the sector is strongly supported by the government, especially following the effects of the crisis.

Figure 521. Trend in public expenditure in Culture in Malta

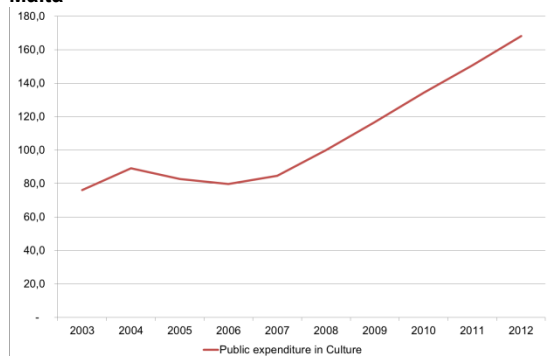
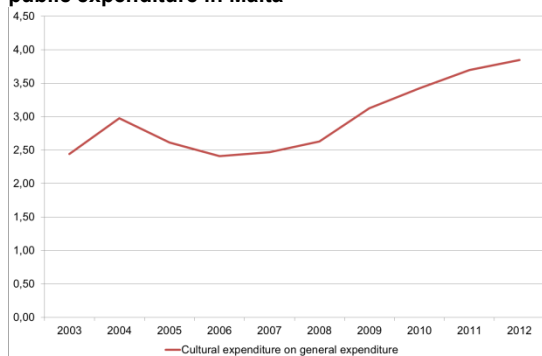


Figure 522. Public cultural expenditure on total public expenditure in Malta



Source: Eurostat

Demand and Supply of Culture and Creativity

Data on number of museums are not available and consequently the only indicator on cultural supply is the number of UNESCO cultural sites: 3 in Malta.

Table 56. Number of UNESCO cultural sites in Malta

Description	Year	Number
UNESCO cultural sites	2013	3

Source: Eurostat, EGMUS

With respect to the demand, participation in cultural activities is not very high: 24,4% of individuals visit cultural sites and 20,3% attend live performances, but only around 5% of them do it more than 4 times per year. Figures from the cinema sector are a bit higher, as 35,4% of individuals go to the cinema and 17,5% of them do it regularly.

Table 57. Cultural behaviours in Malta

Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	79,7	14,6	4,0	1,2	0,5
Times going to the cinema	64,6	18,0	10,7	4,4	2,4
Visits to cultural sites	85,6	9,4	3,1	0,9	1,1

Source: Eurostat

Education

As regards the trend in tertiary studies, while there is a very strong decrease of the number of students in Journalism and information, there is a remarkable increase of those in the Humanities (8,7%) and the Arts (4,6%). However, within the last years, a strong recess is registered in every culture-related subject.

Figure 523. Trend in tertiary students in Malta

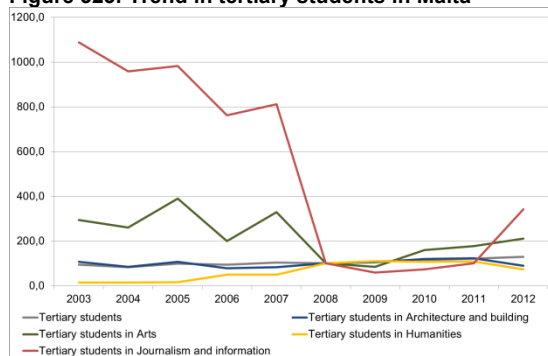
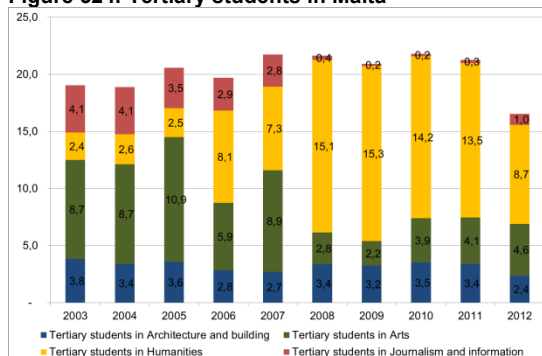


Figure 524. Tertiary students in Malta



Source: Eurostat

Employment and Young employment

A particularly fluctuating trend in employment in the CCSs for youth and adults is presented below. Those employees in the CCSs currently account for 1,2% of total employed in the country. Among young people, the number of them involved in the CCSs has varied considerably in the last years.

Figure 525. Employment and young employment in Malta (Total and in CCSs)

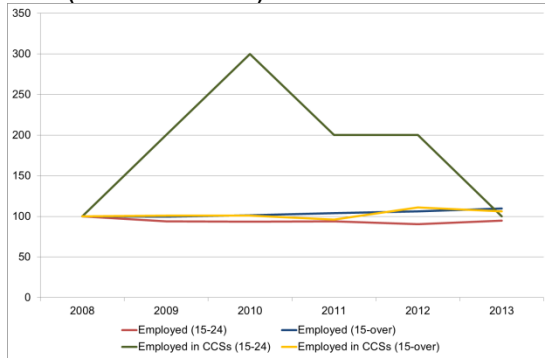
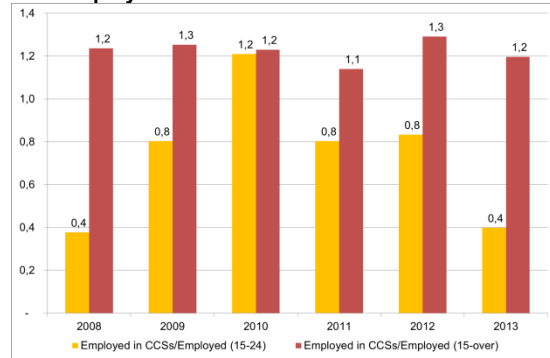


Figure 526. Composition of Employed in CCSs on total employed in Malta



Source: Eurostat

The following charts show the trend in the different CCSs. The available data are clearly fickle in the last few years, but there are two sectors in which data seems to be reliable: "Publishing activities" (NACE 58), which registered an increase in the last 6 years, and "Libraries, archives and museums" (NACE 91) that registered a slight decrease in the last year available. The "Creative arts and entertainment" sector (NACE 90) is diminishing in the last 5 years, but data from 2008 is unavailable for this specific sector.

In general it is difficult to reach a clear interpretation because of the lack of data in the period. Data for young people is also unavailable.

Figure 527. Trend in Employment in CCSs for sector of activity in Malta

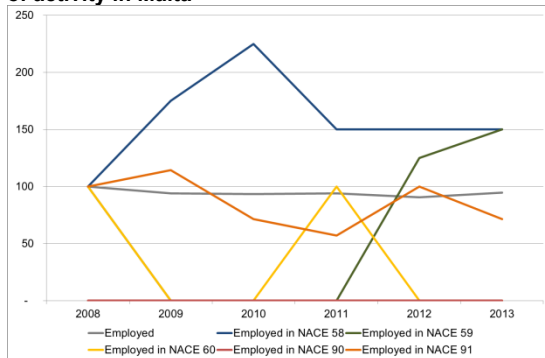
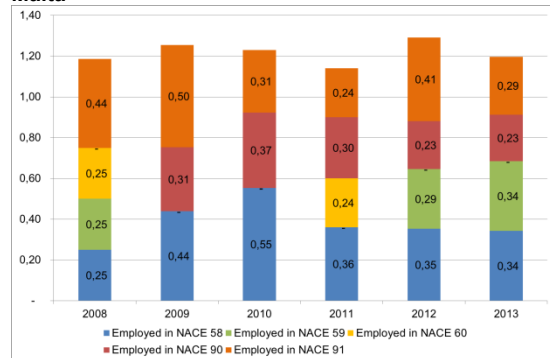


Figure 528. Composition of employed in CCSs in Malta



Source: Eurostat

ICT

Around 70% of individuals use the Internet but only 32,8% have access to broadband. Fixed telephone subscriptions exceed 50% and the amount of individuals who use mobile phones has strongly increased since 2003.

Figure 529. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Malta

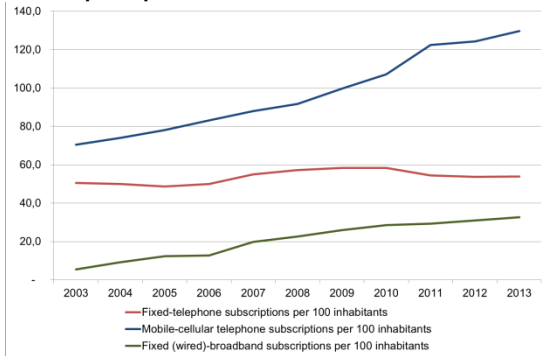
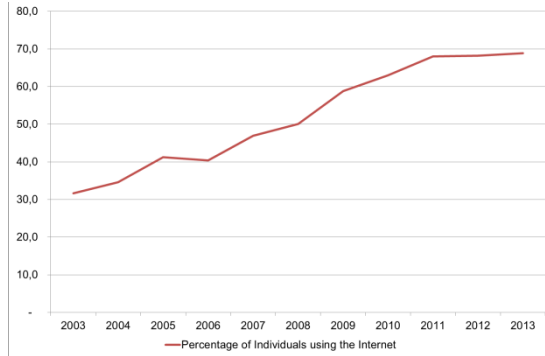


Figure 530. Percentage of Individuals using the Internet in Malta



Source: Eurostat

Employees in ICT represent 3% of total employed population, but data on “Information services” (NACE 63) is actually available. The trend as regards the “Telecommunications” (NACE 61) and “Computer programming” (NACE 62) sectors shows a clear fluctuation: the “Telecommunications” sector registered a fall from 2008, but the trend shows a slight increase in the last years. “Computer programming”, on the contrary, has registered a growth during the same first period, but of lately is again decreasing.

Figure 531. Trend in ICT Employment in Malta

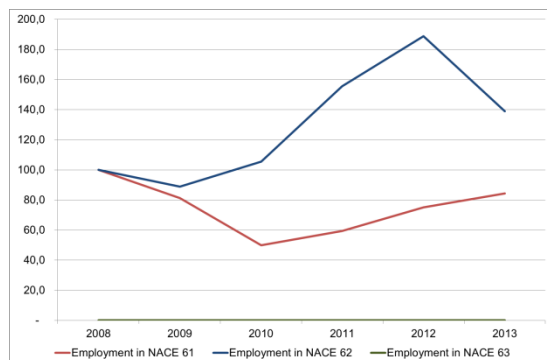
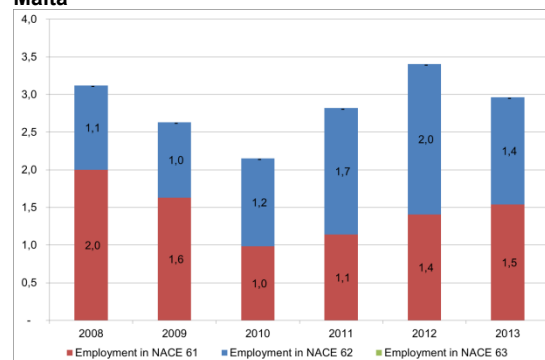


Figure 532. Composition of ICT Employment in Malta



Source: Eurostat

THE NETHERLANDS

The Netherlands, with 16,7 million inhabitants, is a founding member of the European Union (1952).

Its demographic trend is positive: population is growing, with a remarkable increase of youth in comparison to adults. Labour force is also increasing, at a similar rate for both adults and young people.

Figure 533. Trend in population in The Netherlands

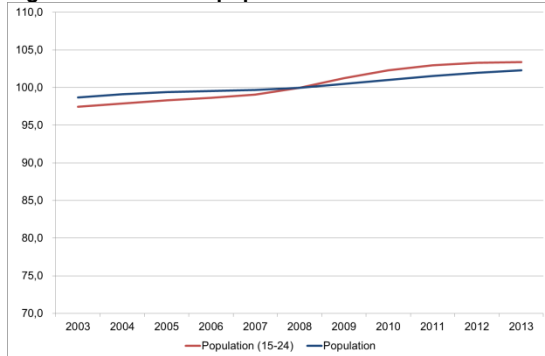
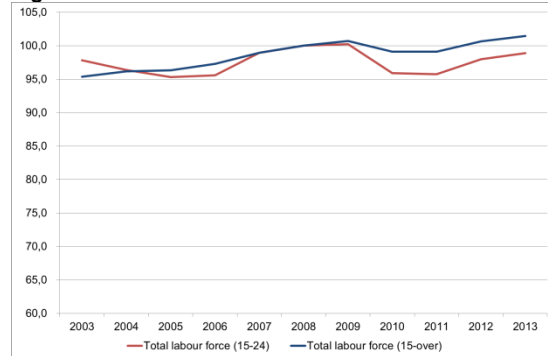


Figure 534. Trend in labour force in The Netherlands



Source: Eurostat

The economic indicators show that the impact of the crisis has not been particularly strong in the Netherlands, as GDP is growing while the public budget has been stable from 2010.

Figure 535. Trend in GDP in The Netherlands

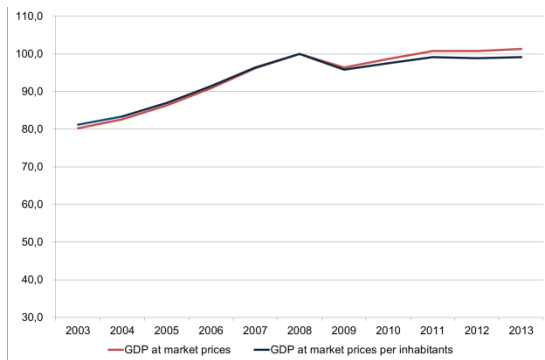
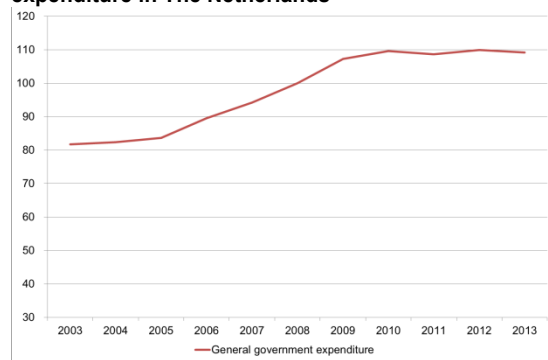


Figure 536. Trend in general government expenditure in The Netherlands



Source: Eurostat

Since 2008 the employment rate has gone going down but this trend is partially neutralized by the growth in self-employment. Indeed, the self-employment trend is positive for both young and adults.

Figure 537. Trend in employment in The Netherlands

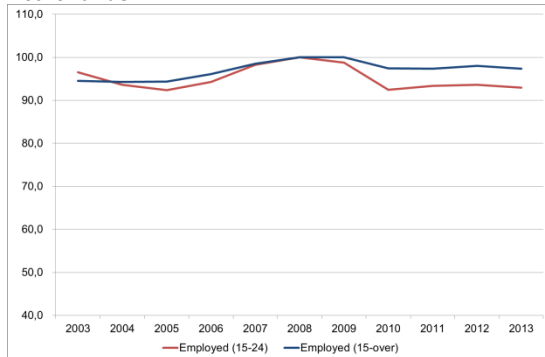
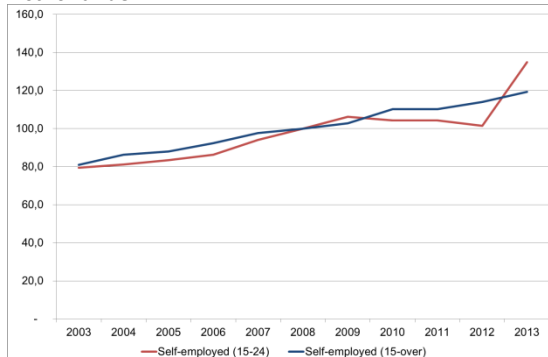


Figure 538. Trend in self-employment in The Netherlands



Source: Eurostat

Social environment

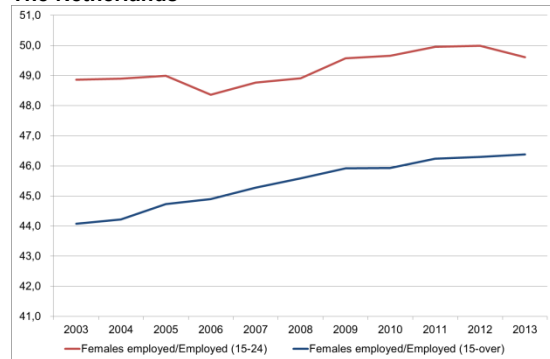
Unlike many other countries, the employment trend for women is negative both for the young and the adults. Women in the labour market represent a 46,4% of the total employed, while there is an equal gender distribution in young people.

Despite the general progress, adult women have lost 1% of employment in the last 6 years, whereas the negative tendency is more visible among the young, with a loss of 5,7%.

Figure 539. Trend in Female employment in The Netherlands



Figure 540. Female participation to labour market in The Netherlands



Source: Eurostat

The granting of citizenship in the last 10 years has fluctuated, registering an increase during the last 3 years. Within this same period, the number of crimes recorded has decreased.

Figure 541. Acquisition of Citizenship in The Netherlands

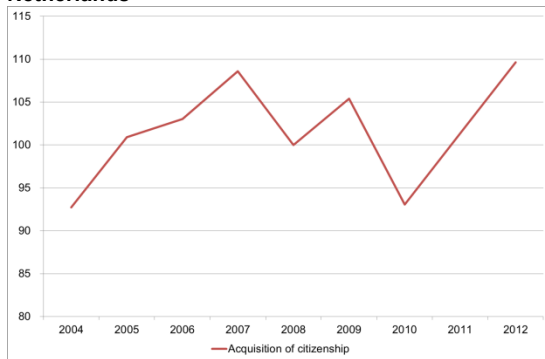
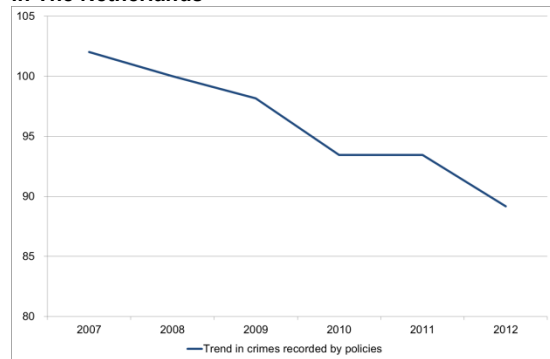


Figure 542. Trend in crimes recorded by the police in The Netherlands



Source: Eurostat

Social policies adopted after the crisis seem to be effective: both the number of young people at risk of poverty and the number of early school leavers is being progressively reduced.

Figure 543. Young people at risk of poverty or exclusion in The Netherlands

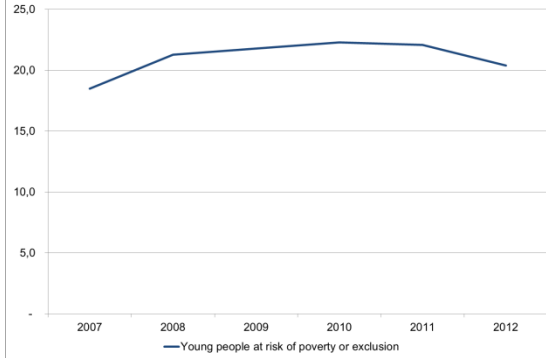
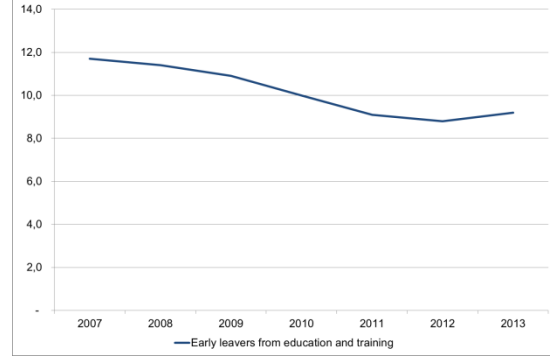


Figure 544. Early leavers from education and training in The Netherlands



Source: Eurostat

Trust indicator in society is very high: 97% of the population strongly trusts close friends and family. More than half of the population, especially young people, participate in voluntary activities and a 31,6% of them collaborates with charitable organizations.

Table 58. Other trust indicators in The Netherlands

Description	Age	2006
Ability to ask any relative, friend or neighbor for help		97
Participation in informal voluntary activities	Adult	53,2
Participation in informal voluntary activities	Young	54
Participation in activities of charitable organisations		31,6

Source: Eurostat

Culture and Creativity

In the last 10 years the yield by the CCSs has shown a negative balance: while the GDP in the CCSs has been stable from 2007, in terms of contribution to the general GDP a negative direction is registered, falling from 1,7% to 1,5% in 10 years.

Figure 545. Trend of GDP in CCSs in The Netherlands

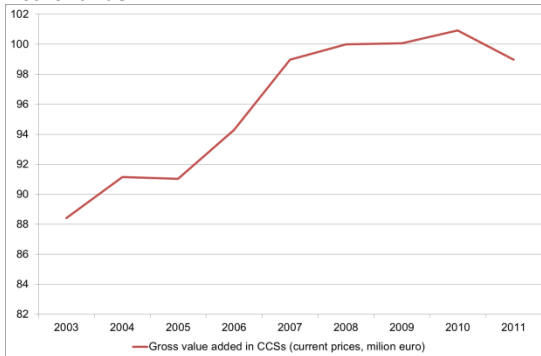
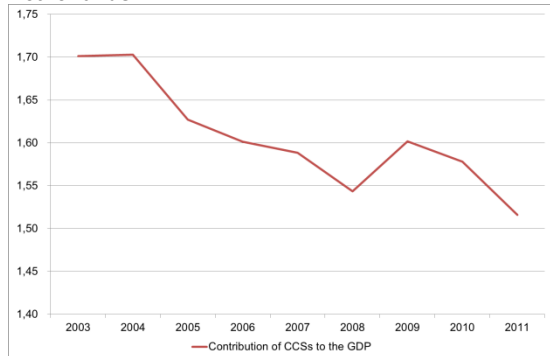


Figure 546. Contribution of CCSs to the GDP in The Netherlands



Source: Eurostat

The trend is confirmed by the negative evolution of public investment in culture: from a 6,4% to a 5,5% of total public expenditure. The development of the CCSs seems to be strictly connected to the figures for public expenditure in culture.

Figure 547. Trend in public expenditure in Culture in The Netherlands

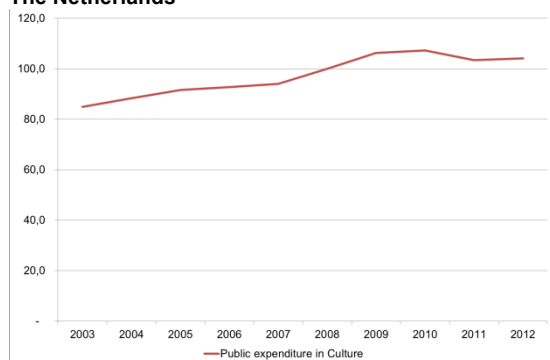
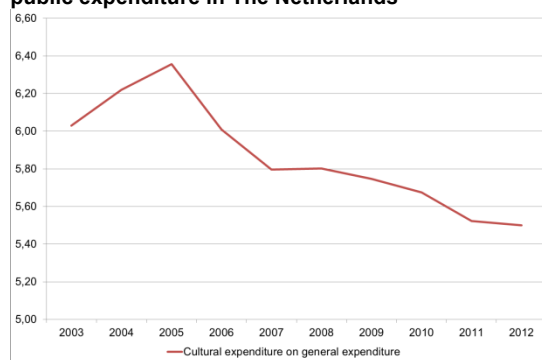


Figure 548. Public cultural expenditure on total public expenditure in The Netherlands



Source: Eurostat

Demand and Supply of Culture and Creativity

There are 788 museums (4,2 per 100.000 inhabitants) and 9 UNESCO cultural sites in the Netherlands.

Table 59. Number of UNESCO cultural sites and museums in The Netherlands

Description	Year	Number
UNESCO cultural sites	2013	9
Museums	2011	788

Source: Eurostat, EGMUS

Cultural demand is high: more than 50% of individuals regularly visit cultural sites, go to the cinema and attend live performances. The number of people repeating these cultural experiences throughout the year is elevated, being live performances (18,7%) and cultural sites (21,9%) the highest.

Table 60. Cultural behaviours in The Netherlands

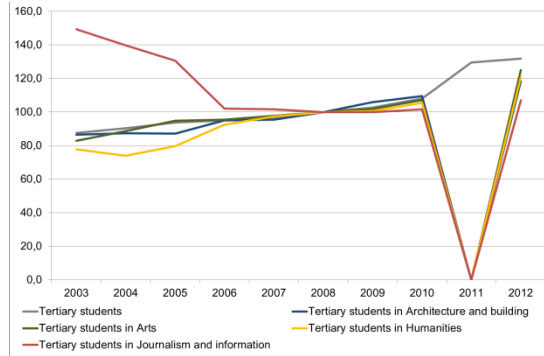
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	47,9	32,6	11,8	5,0	2,9
Times going to the cinema	56,1	25,3	10,6	4,8	3,3
Visits to cultural sites	50,3	27,7	12,0	5,8	4,1

Source: Eurostat

Education

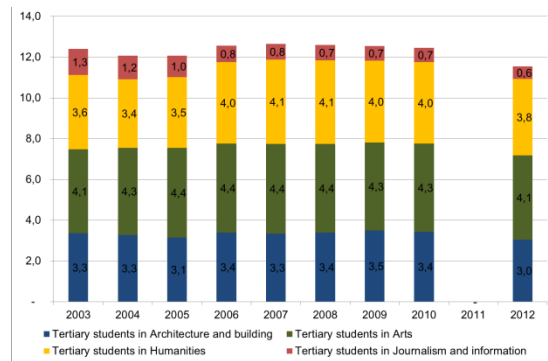
Regarding tertiary education, students in culture-related areas in 2013 are below 12% and have slightly decreased from 2003. The data on Journalism and information students are particularly significant due to the fall from 1,3% in 2003 to 0,6% in 2012. On the other side, students enrolled in the Humanities are increasing and those in the Arts and Architecture and building have, for the last 10 years, remained stable.

Figure 549. Trend in tertiary students in The Netherlands



Source: Eurostat

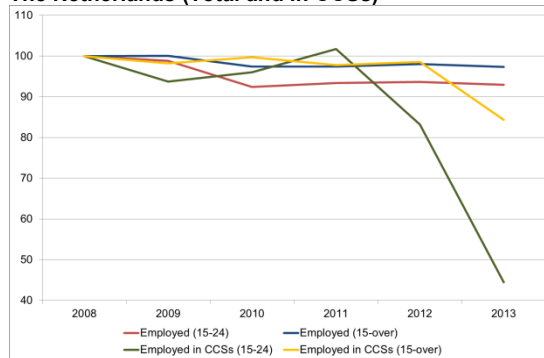
Figure 550. Tertiary students in The Netherlands



Employment and Young employment

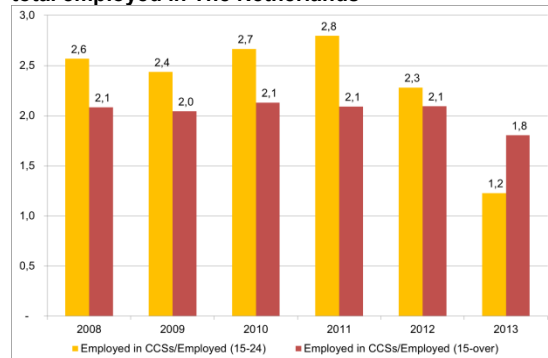
Employment rate in the CCSs was 1,8% in 2013 and it has decreased since 2008. The general trend in the CCSs, both for the young and the adults, is negative when compared with the general employment data.

Figure 551. Employment and young employment in The Netherlands (Total and in CCSs)



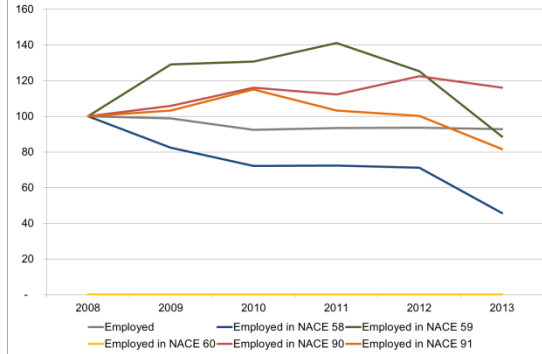
Source: Eurostat

Figure 552. Composition of Employed in CCSs on total employed in The Netherlands



The sectors most affected by the economic crisis are: "Publishing activities"(NACE 58); "Libraries, archives and museums" (NACE 91), traditionally funded by public expenditure; and "Motion picture, video and television programs production, sound recording and music publishing activities" (NACE 59), which maintain the same level as the one registered in 2008. Only the "Arts and entertainment" sector (NACE 90) shows an increase in the last years. Finally, as regards the "Programming and broadcasting" sector (NACE 60) there is no available historical data as they represent a very small portion of the labour market: only 0,1% of total employment in 2013.

Figure 553. Trend in Employment in CCSs for sector of activity in The Netherlands



Source: Eurostat

A negative trend is registered among the new generations, as in 2013 all CCSs are positioned with a low rate in comparison to the general trend.

Figure 554. Composition of employed in CCSs in The Netherlands

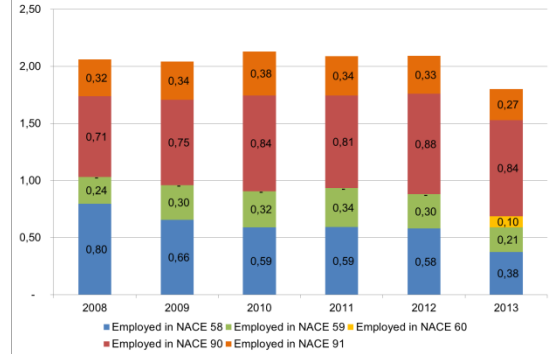
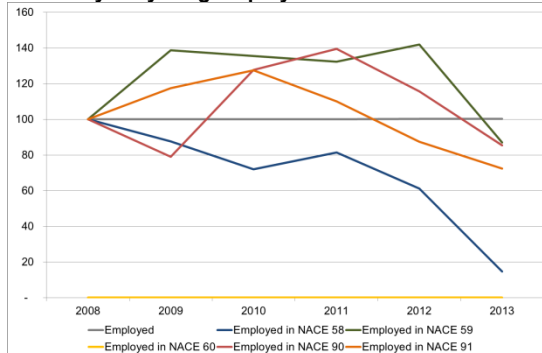
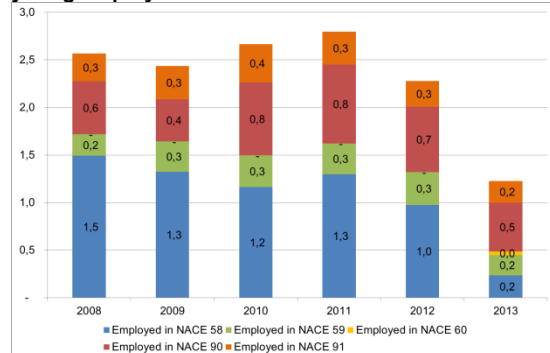


Figure 555. Trend in Employment in CCSs for sector of activity for young employed in The Netherlands



Source: Eurostat

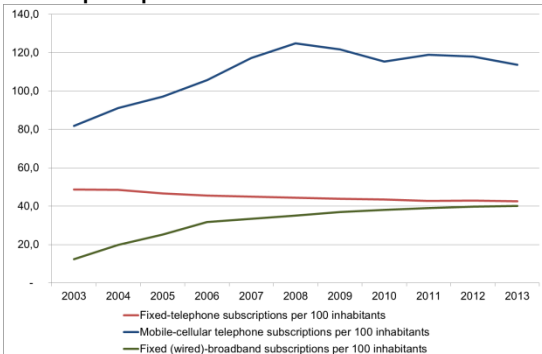
Figure 556. Composition of employed in CCSs for young employed in The Netherlands



ICT

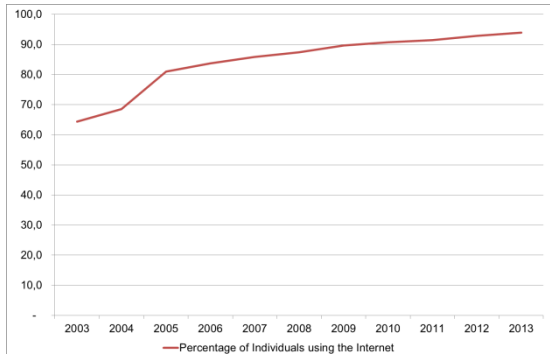
More than 90% of individuals use the Internet and 40% have access to broadband; mobile subscriptions are 113 every 100 inhabitants, while fixed telephone subscriptions are diminishing in the last 10 years.

Figure 557. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in The Netherlands



Source: Eurostat

Figure 558. Percentage of Individuals using the Internet in The Netherlands



Employment in ICT is dropping: in 2013, it was only 2,3% of the total employed in the country. The most relevant data are available for the “Computer programming” sector (NACE 62), which account for 1,8% of the total employed. The “Telecommunications” sector (NACE 61) decreases faster than others, and only “Information services” are increasing, even though they are a minority (0,1% in 2013) within ICT.

Figure 559. Trend in ICT Employment in The Netherlands

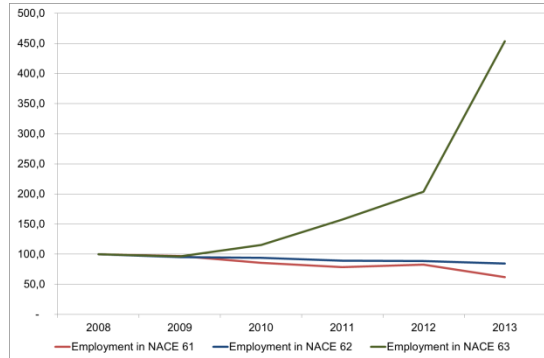
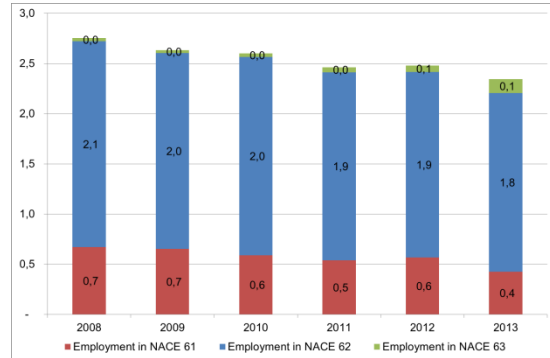


Figure 560. Composition of ICT Employment in The Netherlands



Source: Eurostat

POLAND

Poland has been a member of the European Union since 2004. 38,1 million people currently live in the country. The following charts show the trend in population in the last 10 years: overall the population is slightly increasing but the young are diminishing and, consequently, the labour market is following the same direction.

Figure 561. Trend in population in Poland

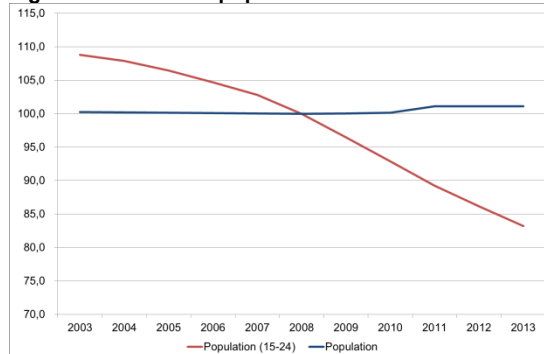
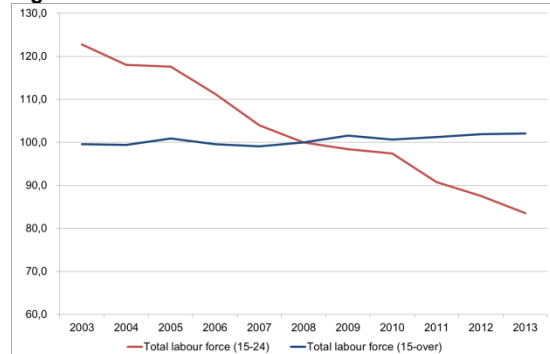


Figure 562. Trend in labour force in Poland



Source: Eurostat

After the crisis, the GDP had a recess in the biennium 2008-2009, but then registered a slow growth. On the other hand, general public expenditure has been stable since 2010.

Figure 563. Trend in GDP in Poland

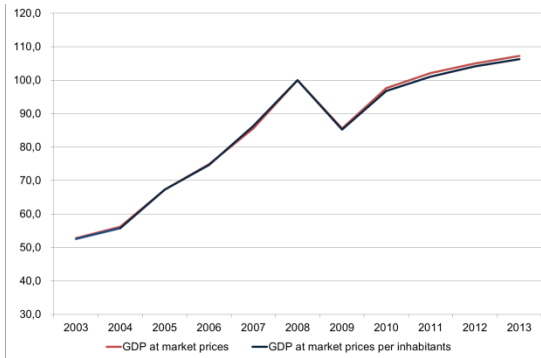
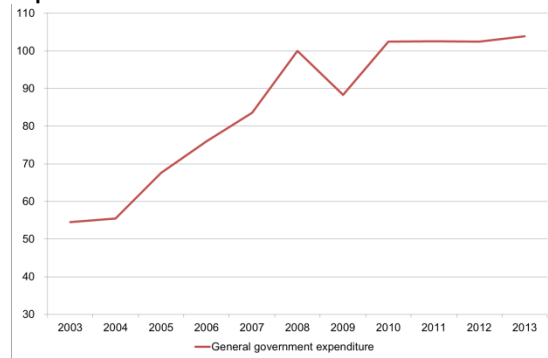


Figure 564. Trend in general government expenditure in Poland



Source: Eurostat

The economic crisis has particularly affected the young; the employment and self-employment among adults shows a slight decrease in the last 5 years, but the negative trend is much more visible for young people.

Figure 565. Trend in employment in Poland

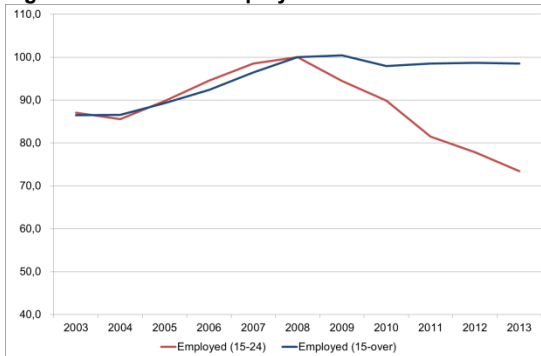
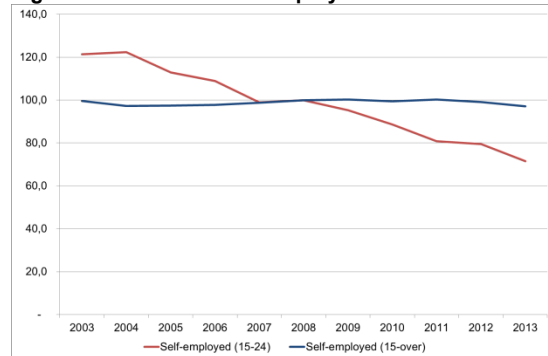


Figure 566. Trend in self-employment in Poland



Source: Eurostat

Social environment

Despite the positive tendency in other European countries, women's employment in Poland does not reach the expectations. The situation in 2013 is even worse than it was in 2008 and young female employment has especially suffered a strong fall in the last 2 years.

Figure 567. Trend in Female employment in Poland

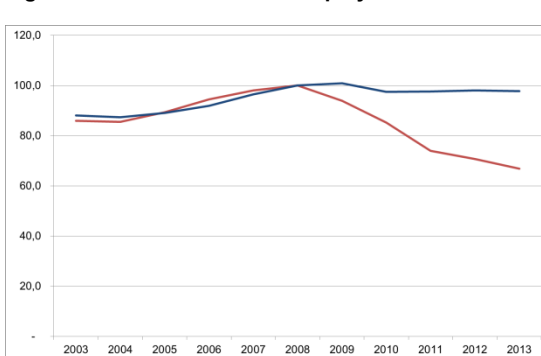
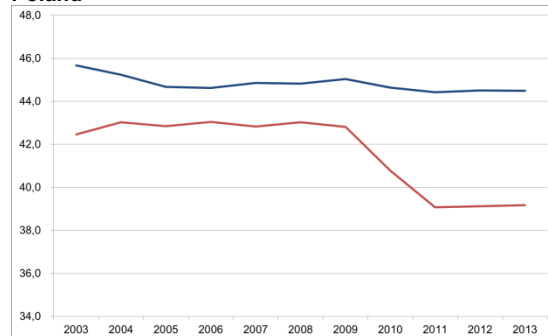


Figure 568. Female participation to labour market in Poland



Source: Eurostat

Data about the new citizenships acquired and the trend in criminal activities are positive: while the crime has decreased in the last years, the acquisition of new citizenship has strongly increased.

Figure 569. Acquisition of Citizenship in Poland

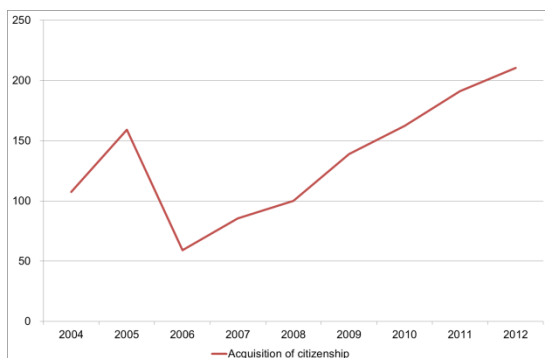
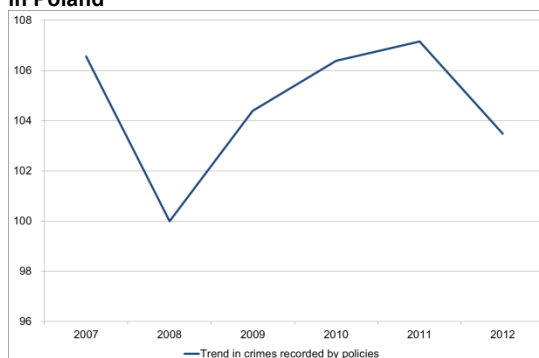


Figure 570. Trend in crimes recorded by the police in Poland



Source: Eurostat

The risk of poverty is dropping among the young population but the numbers of early school leavers has risen in the last years.

Figure 571. Young people at risk of poverty or exclusion in Poland

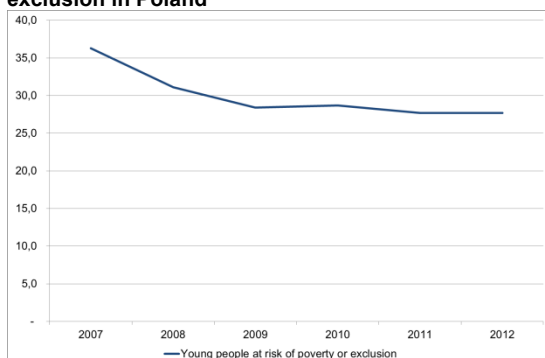
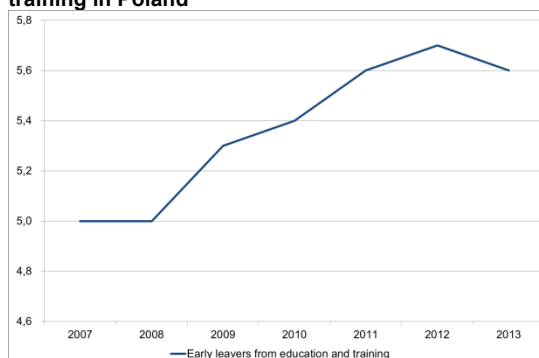


Figure 572. Early leavers from education and training in Poland



Source: Eurostat

The level of trust is elevated: 51,5% of adults and 51,7% of young people declare to participate in voluntary activities and 94,2% have a strong relationship with family and closer friends.

Table 61. Other trust indicators in Poland

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		94,2
Participation in informal voluntary activities	Adult	51,5
Participation in informal voluntary activities	Young	51,7
Participation in activities of charitable organisations		3,2

Source: Eurostat

Culture and Creativity

The economic crisis has affected the CCSs: the following data show a 20% decrease of GDP in CCSs in the last 5 years. In addition, the contribution of the CCSs to GDP is decreasing reaching 1,45% of the total GDP in 2011.

Figure 573. Trend of GDP in CCSs in Poland

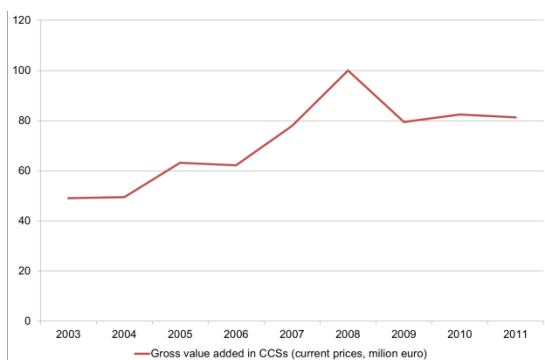
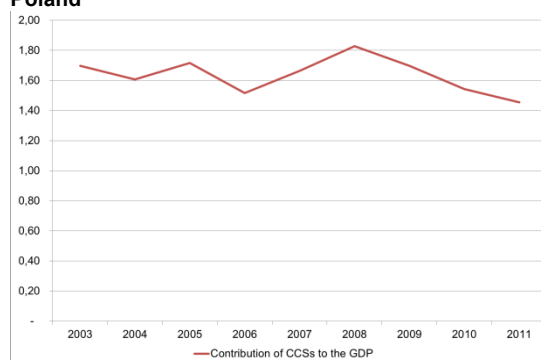


Figure 574. Contribution of CCSs to the GDP in Poland



Source: Eurostat

The trend in GDP is partially explained by the fact that public expenditure in culture has been reduced after the crisis: in 2012 it was only 4,34% of the total public budget.

Figure 575. Trend in public expenditure in Culture in Poland

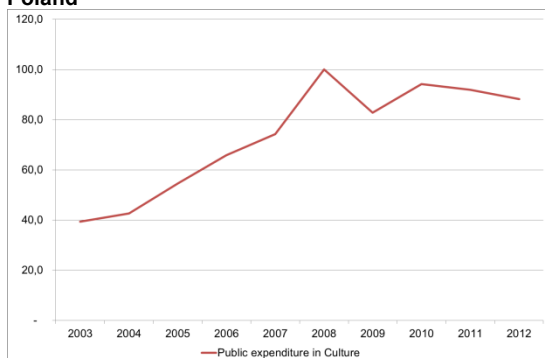
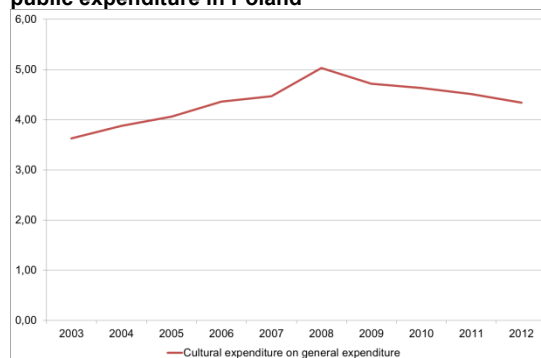


Figure 576. Public cultural expenditure on total public expenditure in Poland



Source: Eurostat

Demand and Supply of Culture and Creativity

In Poland there are 13 UNESCO cultural sites and 777 museums (1,79 every 100.000 inhabitants).

Table 62. Number of UNESCO cultural sites and museums in Poland

Description	Year	Number
UNESCO cultural sites	2013	13
Museums	2011	777

Source: Eurostat, EGMUS

Cultural participation is considerably lower than in other countries: 24,3% of the inhabitants attend live performances but only 5,6% of them repeat the experience more than 4 times per year. 37,1% goes to the cinema (only 12,4% does it more than 4 times) and 31,3% visit cultural sites, from which only 8,5% of them repeat the activity.

Table 63. Cultural behaviours in Poland

Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	75,7	18,7	3,8	1,2	0,6
Times going to the cinema	62,9	24,7	8,0	3,0	1,4
Visits to cultural sites	68,7	22,8	5,2	1,7	1,6

Source: Eurostat

Education

The trend in tertiary students in culture-related subjects has grown over the last decade. The students enrolled in the Humanities are the most (6,7% of total students) although the rate has decreased since 2008. The students in Architecture and building are increasing (from 2,7% in 2003 to 4,3% in 2012), as well as the students in the Arts and in Journalism and information, but they respectively represent only 1,6% and 1,2% out of the total in 2013.

Figure 577. Trend in tertiary students in Poland

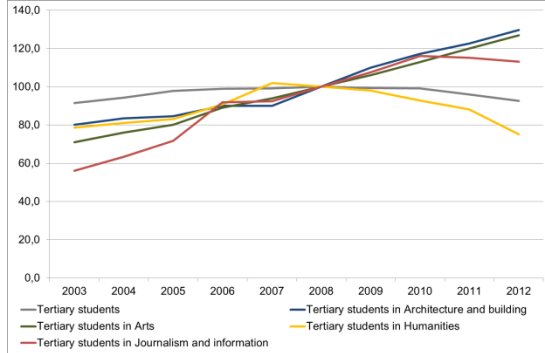
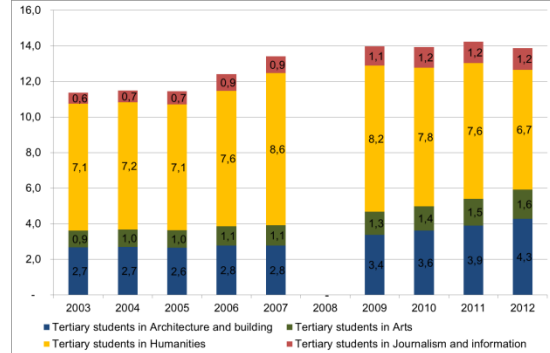


Figure 578. Tertiary students in Poland



Source: Eurostat

Employment and Young employment

The employment trend has followed a different development path in the last 6 years among adults and young. The young employed in the CCSs are facing the crisis in a better way than their colleagues employed in other sectors. On the other hand, the adults employed in the CCSs are diminishing more than the ones in other sectors. The number of employed in the CCSs is 1,3% of total employment in 2013.

Figure 579. Employment and young employment in Poland (Total and in CCSs)

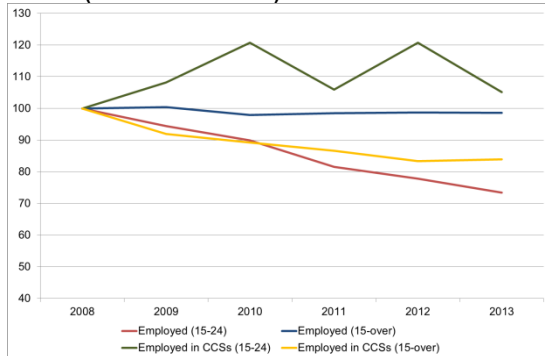
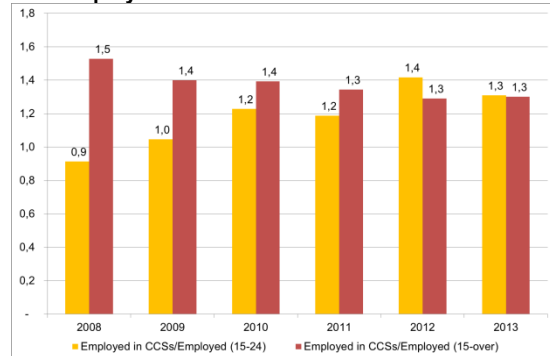


Figure 580. Composition of Employed in CCSs on total employed in Poland



Source: Eurostat

The following tables show the trend in employment in the CCSs by sectors: in general, there is a negative balance registered for each sector, following the general trend. “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) registers a positive trend, but represents only 0,11% of the total employed. “Publishing activities” (NACE 58) have registered a remarkable negative trend with a loss of 19% in the past 6 years. The “Creative arts and entertainment” (NACE 90) and “Libraries, archives and museums” (NACE 91) sectors are the most representative (0,40% in 2013), both of them in decrease from 2009: the first group has dropped a 4% while the second group dropped a 6% in the same period; still, the trend has, the last two years, been inverted.

Figure 581. Trend in Employment in CCSs for sector of activity in Poland

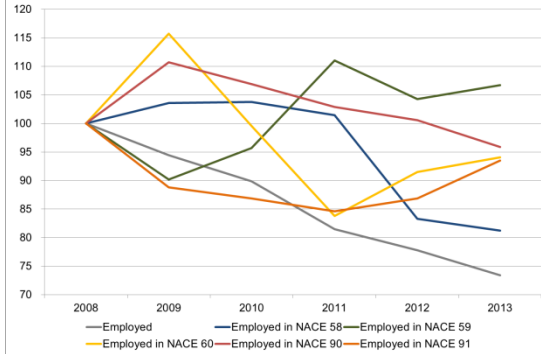
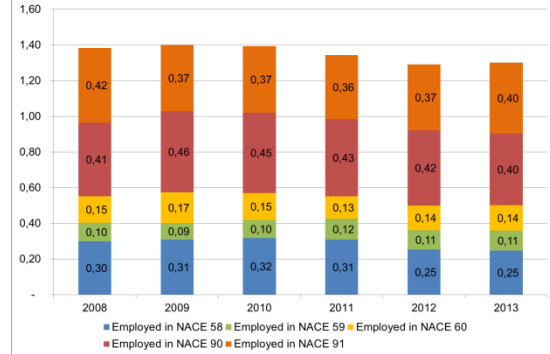


Figure 582. Composition of employed in CCSs in Poland



Source: Eurostat

Among the young, the “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59), the “Programming and broadcasting activities” (NACE 60) and the “Creative, arts and entertainment activities” (NACE 90) sectors register a better balance, but the rest of them decrease considerably in comparison to the general trend.

Figure 583. Trend in Employment in CCSs for sector of activity for young employed in Poland

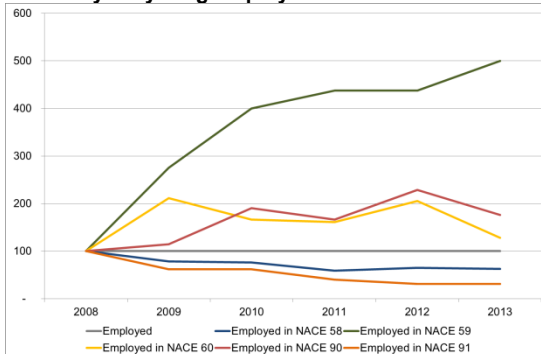
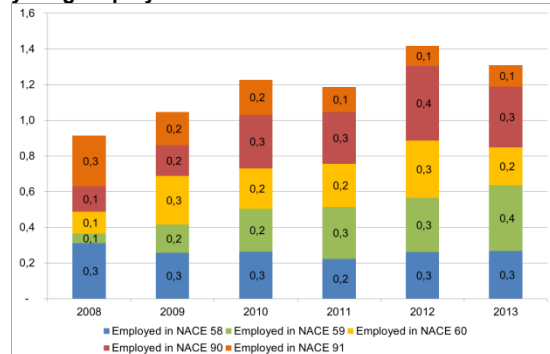


Figure 584. Composition of employed in CCSs for young employed in Poland



Source: Eurostat

ICT

The number of mobile subscriptions has been constantly going up in the last 11 years: while the fixed telephone subscriptions are 13,9 per 100 inhabitants, mobile subscriptions are 150 per 100 inhabitants. For the same period, the access to broadband is at 15,6% and 62,8% of total population uses the Internet.

Figure 585. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Poland

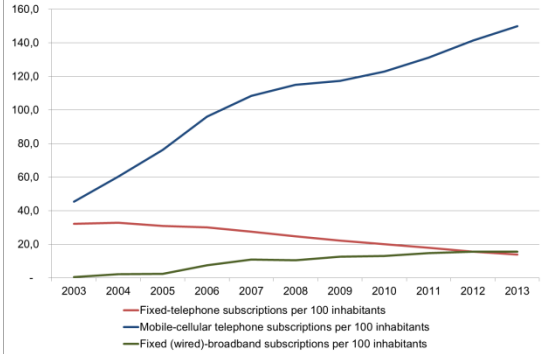
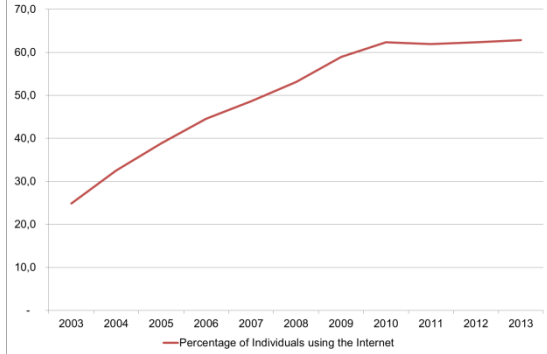


Figure 586. Percentage of Individuals using the Internet in Poland



Source: Eurostat

The employment in the ICT sector registers a better performance than in the general labour market. The “Computer programming, consultancy and related activities” (NACE 62) is the largest sector (0,9% of total employment) and the only one that registered a negative trend in the last 6 years. “Telecommunications” (NACE 61) is the second largest one. The most dynamic sector is “Information services” (NACE 63), but it only represents 0,1% of total employment.

Figure 587. Trend in ICT Employment in Poland

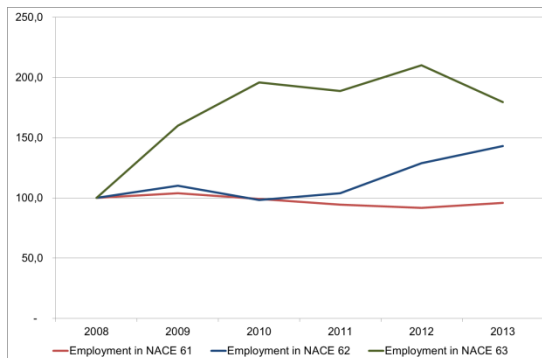
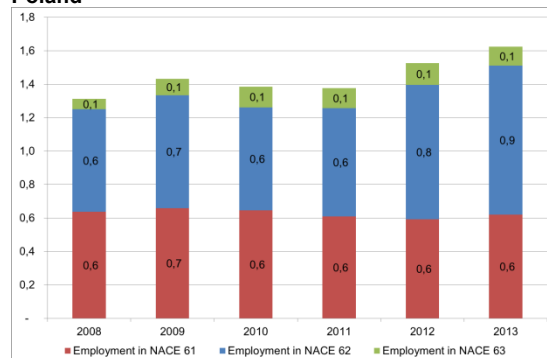


Figure 588. Composition of ICT Employment in Poland



Source: Eurostat

PORTUGAL

Portugal has been a member of European Union since 1986. The total population is 10,4 million and the general trend shown in the following charts has been stable in the last 11 years, while the young population has decreased by 21,8% from 2003.

Figure 589. Trend in population in Portugal

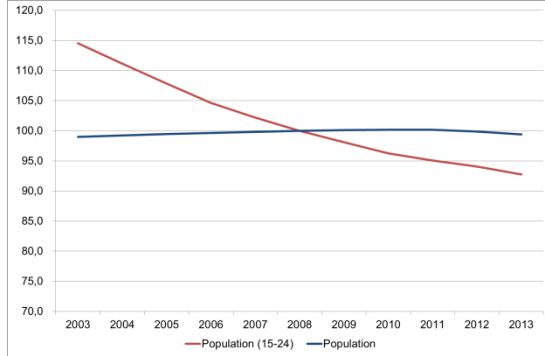
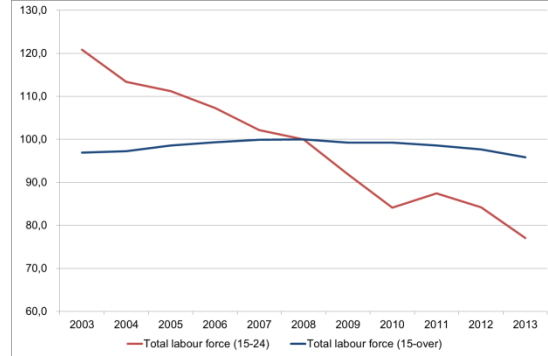


Figure 590. Trend in labour force in Portugal



Source: Eurostat

The crisis in Portugal had mid-term effects. The growth has been recessed from 2008 and has significantly decreased in the last two years. The public budget has strongly decreased since 2010 and its position in 2013 is lower than it was in 2008.

Figure 591. Trend in GDP in Portugal

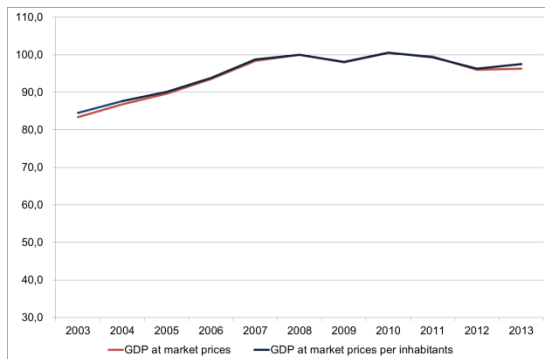
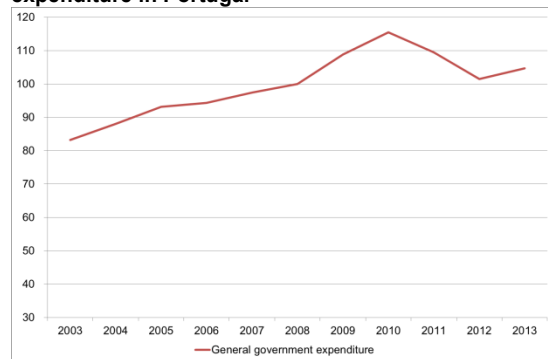


Figure 592. Trend in general government expenditure in Portugal



Source: Eurostat

The trend in employment presented in the following charts is negative both for the employed and the self-employed. The employed registered a loss of 13,2%, while the self-employed have lost 21,4% since 2008. The situation of young people is even more worrying, as the trend of employed is very negative: -42,5% in the last 6 years, while the young self-employed have decreased a 16,2%, but either way their position is better if compared to that of adults.

Figure 593. Trend in employment in Portugal

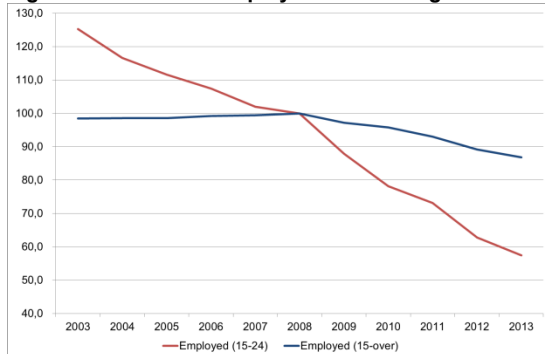
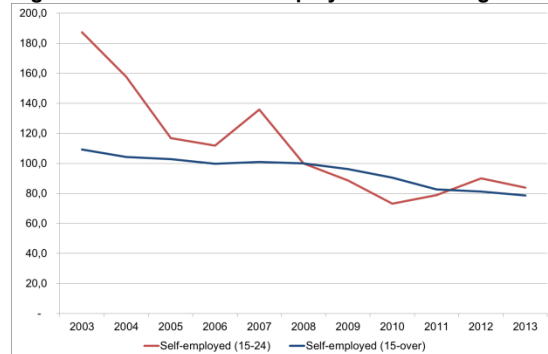


Figure 594. Trend in self-employment in Portugal



Source: Eurostat

Social environment

While the employment situation is very negative, the trend is different among women: although they lose 10,7% (less than the general trend) their participation to the labour market has increased in the last years reaching 47,5%. A similar trend is registered by young women: they have lost 30,1% (less than the general trend) and there is 46% of young women employed.

Figure 595. Trend in Female employment in Portugal

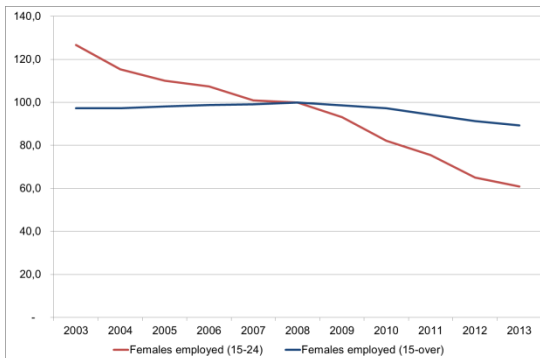
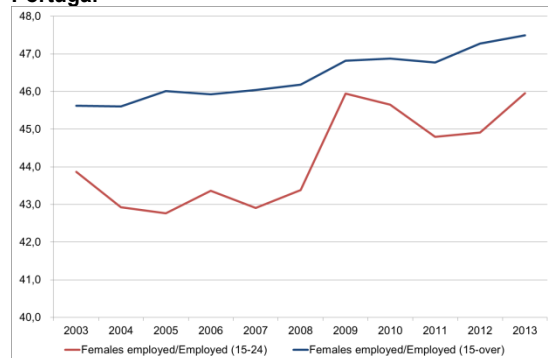


Figure 596. Female participation to labour market in Portugal



Source: Eurostat

From 2006, the acquisition of new citizenship has strongly increased while the crime rate has, during the same period, decreased.

Figure 597. Acquisition of Citizenship in Portugal*

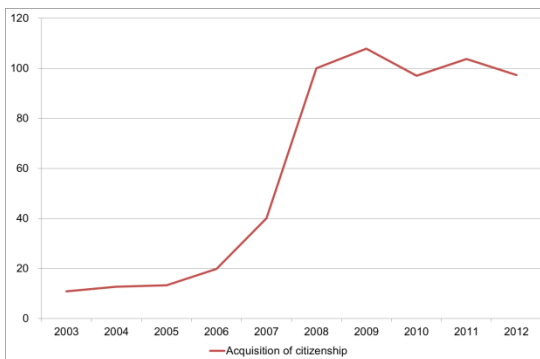
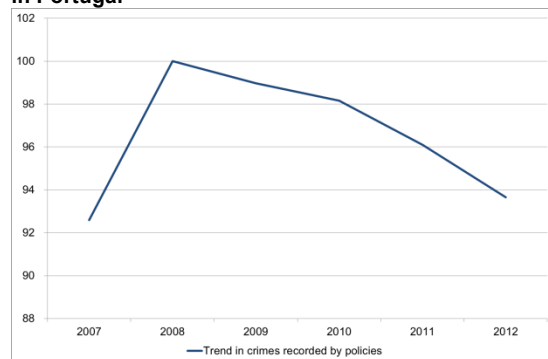


Figure 598. Trend in crimes recorded by the police in Portugal



Source: Eurostat
*Estimated in 2007

Compared to other European countries, the crisis strongly affects the young population in Portugal, reaching a 28,4% at risk of poverty or exclusion in 2013. On the other hand, social policies seem to be quite effective, as the rate of early school leavers is improving.

Figure 599. Young people at risk of poverty or exclusion in Portugal

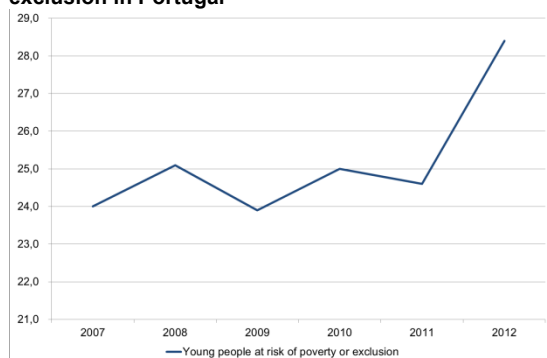
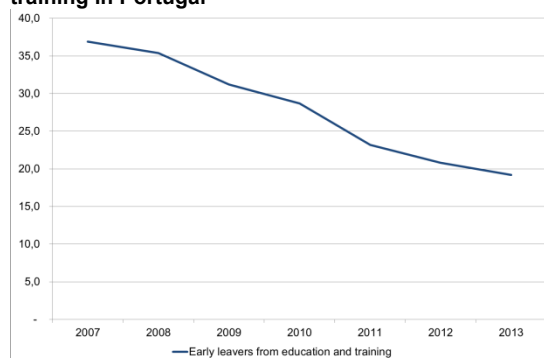


Figure 600. Early leavers from education and training in Portugal



Source: Eurostat

Social cohesion is a strong asset in Portugal: 92,5% of individuals trust in family or closer friends and 28,4%, both young and adults, participate in voluntary activities.

Table 64. Other trust indicators in Portugal

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		92,5
Participation in informal voluntary activities	Adult	28,4
Participation in informal voluntary activities	Young	28,4
Participation in activities of charitable organisations		5,1

Source: Eurostat

Culture and Creativity

The following tables show the trend in GDP directly connected with the CCSs. The general trend is stable from 2008 and the contribution of CCSs to the national GDP is slightly fluctuating from 0,84% in 2003 to 0,89% in 2009. In 2011, the last year with available data, GDP reached 0,87%.

Figure 601. Trend of GDP in CCSs in Portugal

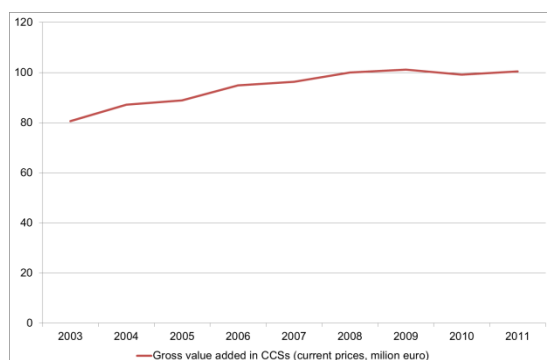
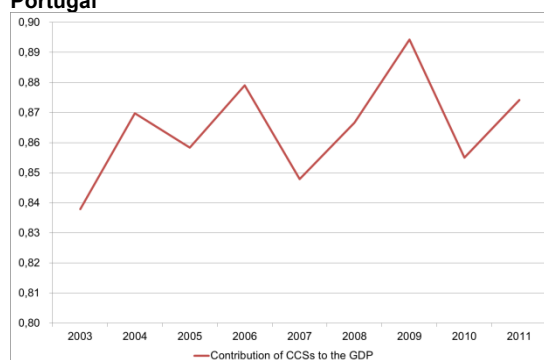


Figure 602. Contribution of CCSs to the GDP in Portugal



Source: Eurostat

The graphs below show that public contribution in the CCSs has, over the same period, decreased, and this especially from 2009. Public expenditure in culture in 2012 was lower than it was in 2003 and it has diminished by about 25% since 2008. The national budget allocation dedicated to culture has decreased since 2003 (4,04%), remaining only a 3,22% in 2012.

Figure 603. Trend in public expenditure in Culture in Portugal

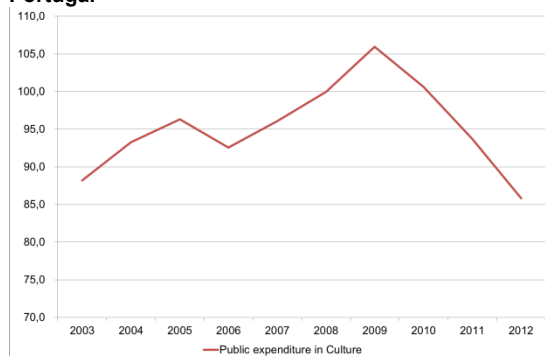
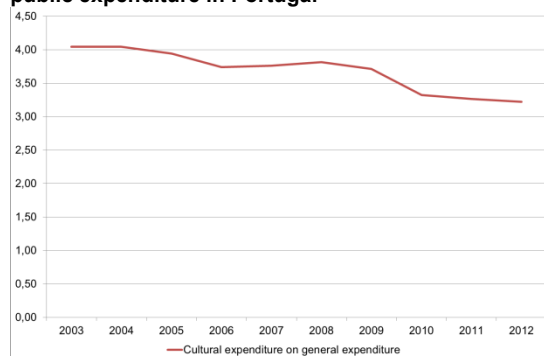


Figure 604. Public cultural expenditure on total public expenditure in Portugal



Source: Eurostat

Demand and Supply of Culture and Creativity

There are 630 museums in Portugal (1,79 per 100.000 inhabitants) and 14 UNESCO cultural sites.

Table 65. Number of UNESCO cultural sites and museums in Portugal

Description	Year	Number
UNESCO cultural sites	2013	14
Museums	2011	630

Source: Eurostat, EGMUS

Participation in cultural life is shown in the following table: 43,7% attend live performances (13,4% does it more than 4 times per year), 31,3% goes to the cinema (approximately half of them repeat this activity over 4 times a year) and 30,6% visit cultural sites (but only a 8,9% does it frequently).

Table 66. Cultural behaviours in Portugal

Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	56,3	30,1	8,8	2,9	1,9
Times going to the cinema	68,7	16,1	7,4	4,1	3,7
Visits to cultural sites	69,4	21,7	5,4	1,9	1,6

Source: Eurostat

Education

The charts below present the trend in tertiary students in culture-related subjects. The students in the Arts and in the Humanities are the only groups registering an increase from 2008. The students in the Arts are 5,8% of the total and the ones in the Humanities are 3,8%. The largest number of students in the CCSs are the Architects (6,6% in 2013), but from 2003 the numbers are decreasing. Students enrolled in Journalism and information represent 1,9% in 2013, but this discipline has seen its popularity decrease in the last 10 years.

Figure 605. Trend in tertiary students in Portugal

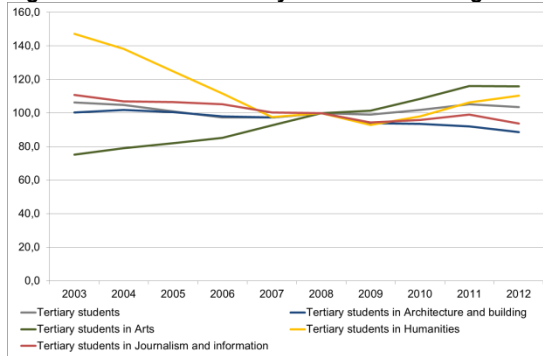
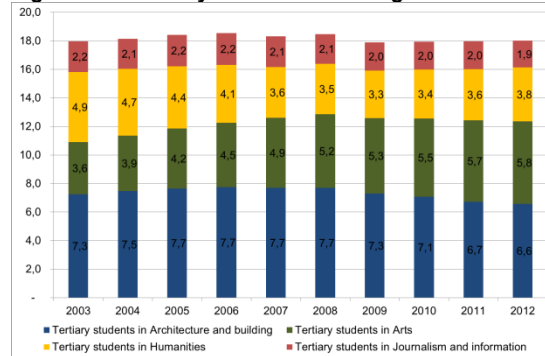


Figure 606. Tertiary students in Portugal



Source: Eurostat

Employment and Young employment

The following data show the trend in employment in the CCSs. Those employed in the CCSs are 1,0%, including both adults and young people. The trend in the last 6 years is negative, but those working in the CCSs are in a better position than those working in other sectors.

Figure 607. Employment and young employment in Portugal (Total and in CCSs)

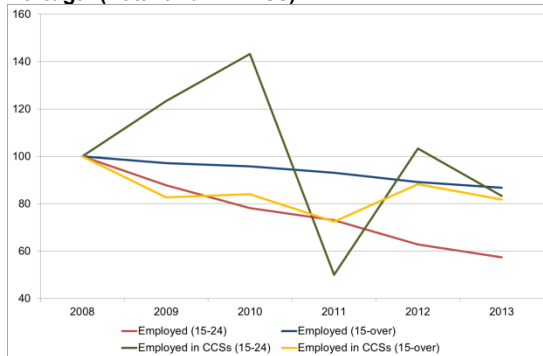
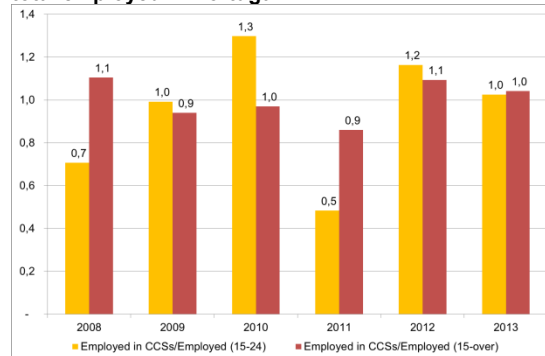


Figure 608. Composition of Employed in CCSs on total employed in Portugal



Source: Eurostat

The trend in employment in the CCSs is shown in the next graphic. All CCSs registered a better balance than the general trend: the employed in “Creative, arts and entertainment activities” sector (NACE 90) have lost 27%; the “Publishing activities” sector (NACE 58) have registered a loss of 25% in the last 6 years; the “Programming and broadcasting activities” sector (NACE 60) present a -19%. Two sectors have registered a positive trend: “Motion picture, video and television program production, sound recording and music publishing activities” sector (NACE 59), that reached a 0,2% of the total employed in 2013, with an increase of 63%; and the “Libraries, archives, museums and other cultural activities” sector (NACE 91) that in 2013 reached a 29% more than in 2008, although figures have decreased since 2012.

Figure 609. Trend in Employment in CCSs for sector of activity in Portugal

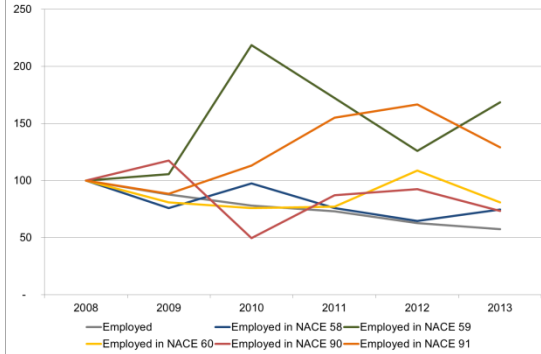
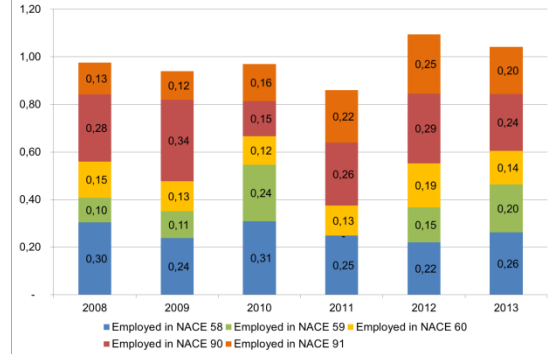


Figure 610. Composition of employed in CCSs in Portugal



Source: Eurostat

*Employed in NACE 59 is estimated in 2011

The trend in employment in the CCSs among the young is not very clear due to the lack of data, especially in 2011. The overall balance regarding the “Libraries, archives, museums and other cultural activities” (NACE 91), the “Creative, arts and entertainment activities” (NACE 90) and the “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) sectors is positive, while the other sectors register negative trends compared to the general.

Figure 611. Trend in Employment in CCSs for sector of activity for young employed in Portugal

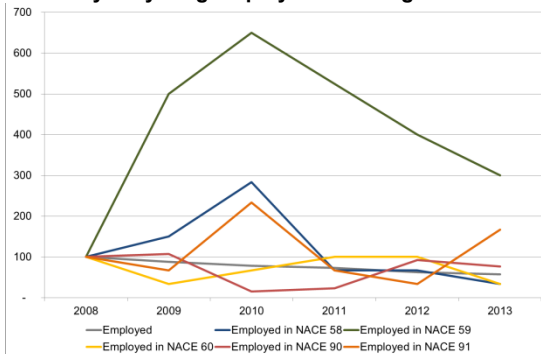
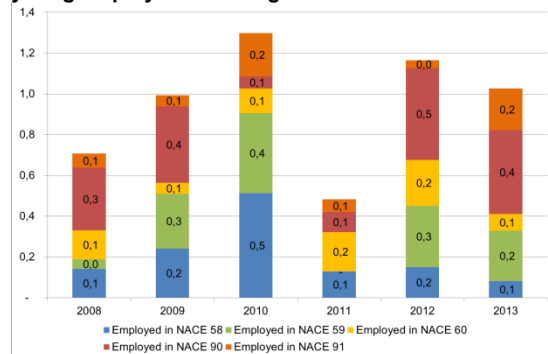


Figure 612. Composition of employed in CCSs for young employed in Portugal



Source: Eurostat

*Employed in NACE 59 is estimated in 2011

ICT

The crisis is significantly affecting the ICT sector in comparison with other European countries. Mobile subscriptions are 113 every 100 inhabitants, but fixed telephone subscriptions have increased in number in 2013 as compared to 2003. In 2013, 23,8% of inhabitants had access to broadband and the rate of population using the Internet was 62,1%.

Figure 613. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Portugal

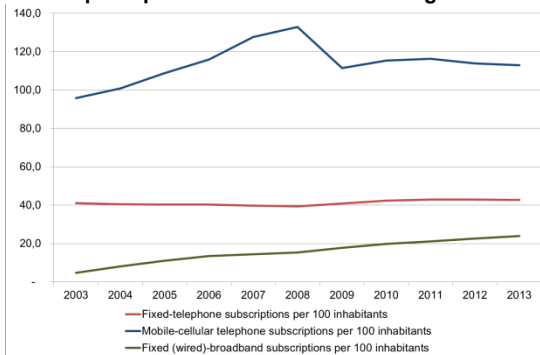
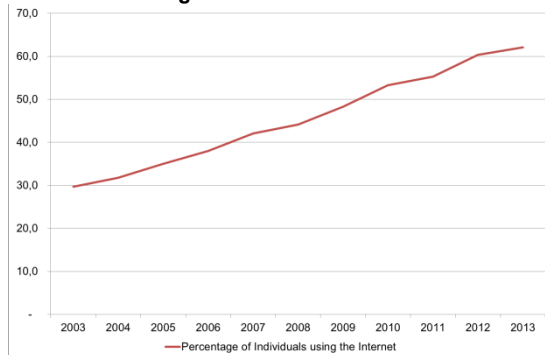


Figure 614. Percentage of Individuals using the Internet in Portugal



Source: Eurostat

The employment in ICTs is presented below. The lack of data for “Information service activities” (NACE 63) makes it difficult to have a complete scenario. As in many other European countries, the rate of employment in the “Telecommunications” sector (NACE 61) is decreasing, while those employed in the “Computer programming, consultancy and related activities” sector (NACE 62) are increasing. At the end of the period, both sectors represent a 0,7% of the total employed.

Figure 615. Trend in ICT Employment in Portugal

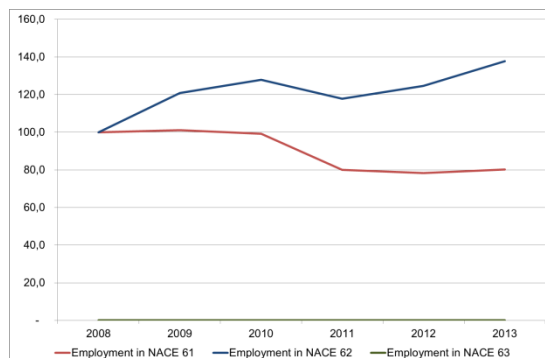
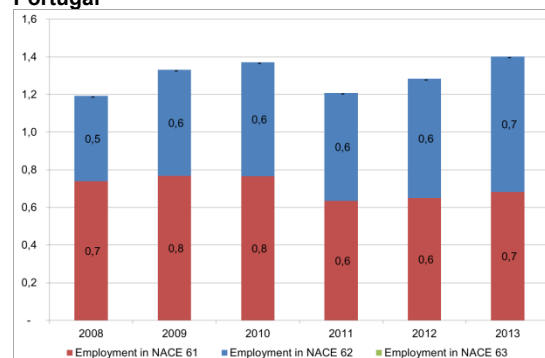


Figure 616. Composition of ICT Employment in Portugal



Source: Eurostat

ROMANIA

Romania is a member of the European Union since 2007 but it does not belong to the Euro zone. The current population is 20,5 million people, but as can be seen in the following graphs, figures have decreased in the last 11 years, especially regarding young population, whereas in the same period labour force has been stable.

Figure 617. Trend in population in Romania

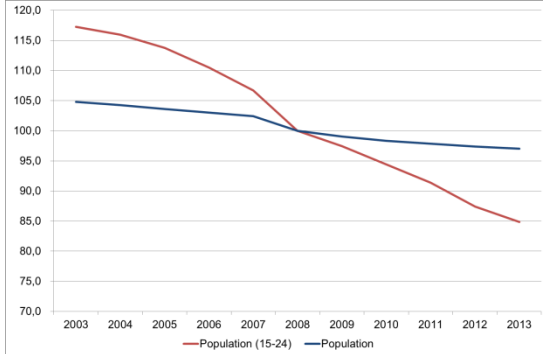
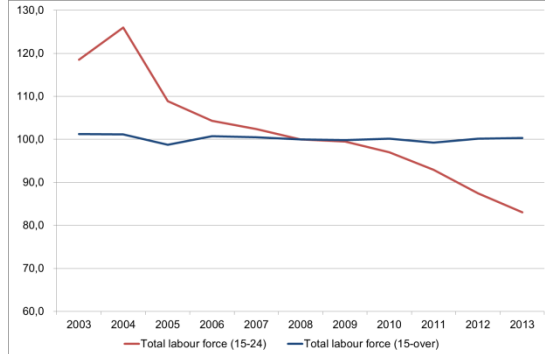


Figure 618. Trend in labour force in Romania



Source: Eurostat

The economic crisis has had a strong effect in Romania, especially from 2008 to 2012. It was not until 2013 that GDP reached again the same level as the one it had in 2008. The government expenditure had a recess from 2008, with an approximate loss of 10% in the last decade.

Figure 619. Trend in GDP in Romania

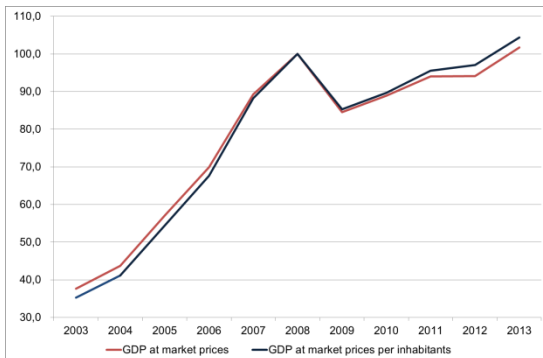
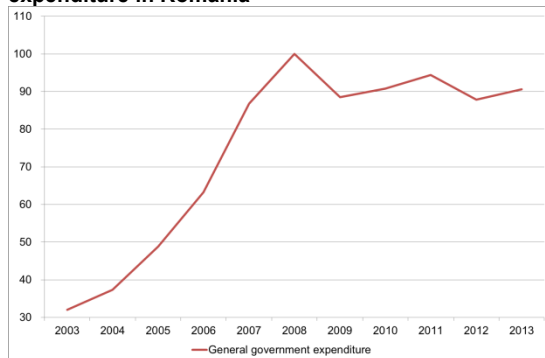


Figure 620. Trend in general government expenditure in Romania



Source: Eurostat

Employment has been stable in the last years, having lost a 1,6% from 2008. The situation seems worse for the young population. In addition, a negative trend is registered regarding self-employment, with a loss of 5,2% since 2008.

Figure 621. Trend in employment in Romania

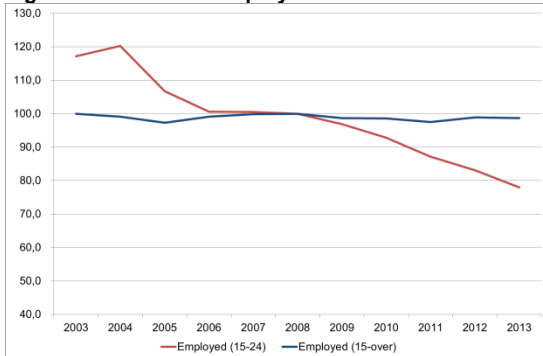
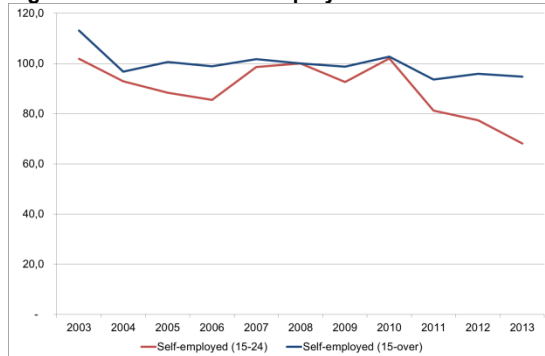


Figure 622. Trend in self-employment in Romania



Source: Eurostat

Social environment

The situation for women in the labour market is similar to the general one. Females employed are 2,2% less than in 2008 and their participation in the labour market within the last decade has decreased. Women in 2013 represented a 44,5% of the total employed, while they were 46% in 2003. Between young women, the rate is lower than the average: in 2013 young females employed were 40% of the total young employed.

Figure 623. Trend in Female employment in Romania

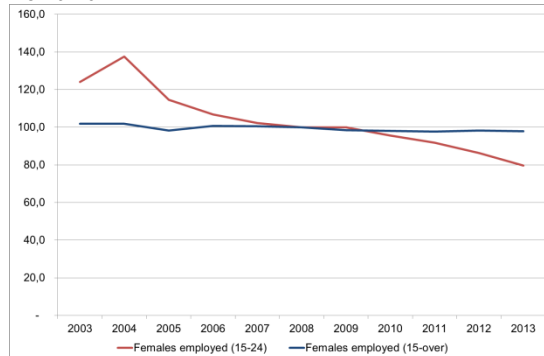
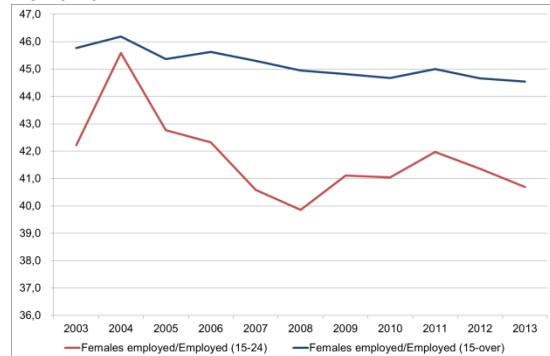


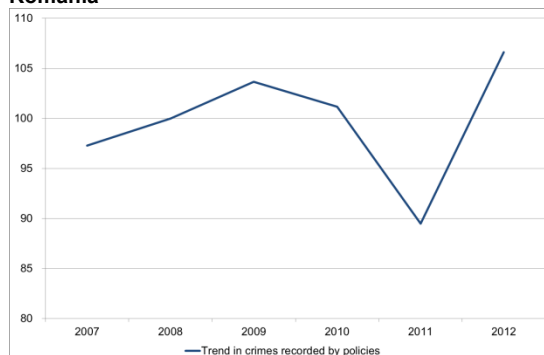
Figure 624. Female participation to labour market in Romania



Source: Eurostat

While the data on new citizenships is not available for the last 6 years, the number of crimes registered has grown in the last year available.

Figure 625. Trend in crimes recorded by the police in Romania



Source: Eurostat

Social policies seem to be ineffective due to the growth of young people at risk of poverty and the number of students dropping out of school early, which in the last few years has remained stable.

Figure 626. Young people at risk of poverty or exclusion in Romania

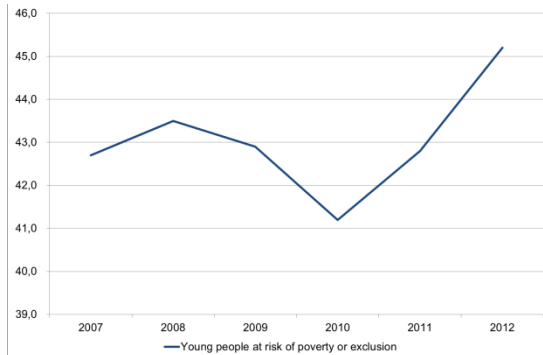
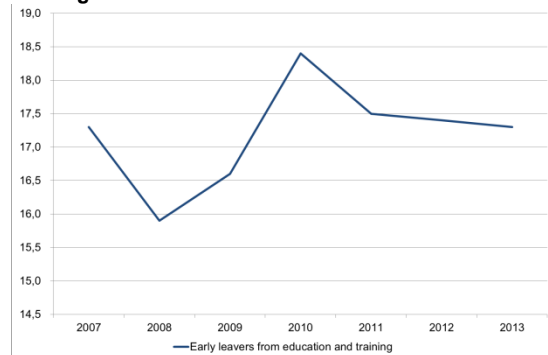


Figure 627. Early leavers from education and training in Romania



Source: Eurostat

The lack of data regarding trust indicators makes it difficult to accomplish a conclusion on the general situation in the country.

Culture and Creativity

While the trend in GDP has been stagnant in the past years, the registered data about CCSs has increased faster. Especially after 2009, the contribution of the CCSs to the general economy of the country registered a growth of 66,2% from 2008, while the contribution to the national GDP is at 1,6%.

Figure 628. Trend of GDP in CCSs in Romania

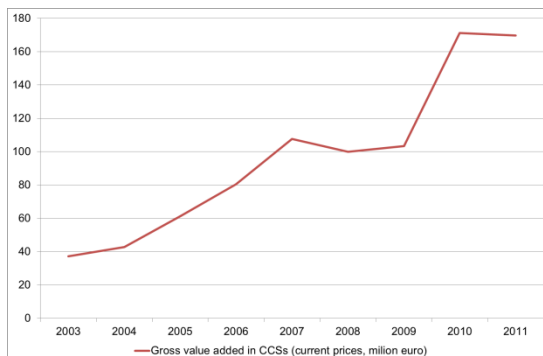
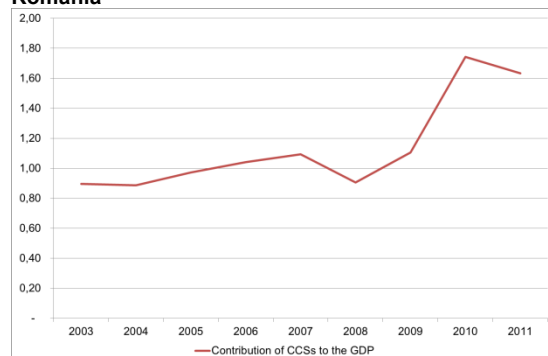


Figure 629. Contribution of CCSs to the GDP in Romania



Source: Eurostat

The CCSs are not significantly supported by the government. The expenditure in culture has decreased from 2007, following the general cuts in national budgets. In 2012, 2,77% of the total public expenditure was devolved to culture.

Figure 630. Trend in public expenditure in Culture in Romania

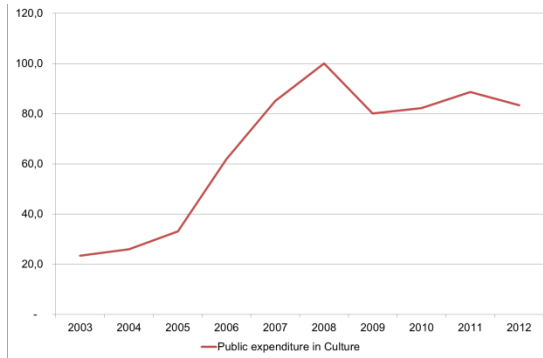
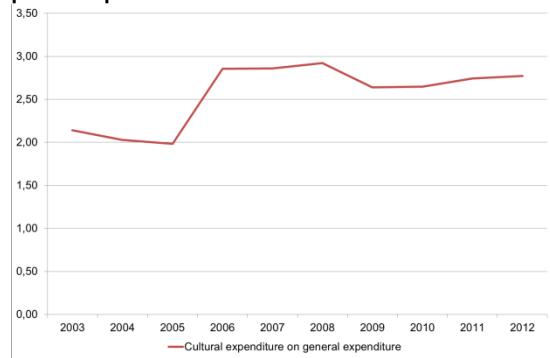


Figure 631. Public cultural expenditure on total public expenditure in Romania



Source: Eurostat

Demand and Supply of Culture and Creativity

In Romania there are 6 UNESCO cultural sites and 748 museums (3,34 per 100.000 inhabitants).

Table 67. Number of UNESCO cultural sites and museums in Romania

Description	Year	Number
UNESCO cultural sites	2013	6
Museums	2007	748

Source: Eurostat, EGMUS

Education

The trend in tertiary education in culture-related subjects is shown in the following charts. The students enrolled in the Humanities and in Journalism and information are decreasing more than the general trend, while the students in the Arts and Architecture and building have increased since 2007. The largest group of students belongs to the Humanities (6,8% in 2013), followed by Architecture (3,7%) and Arts or Journalism and information (1,7%).

Figure 632. Trend in tertiary students in Romania

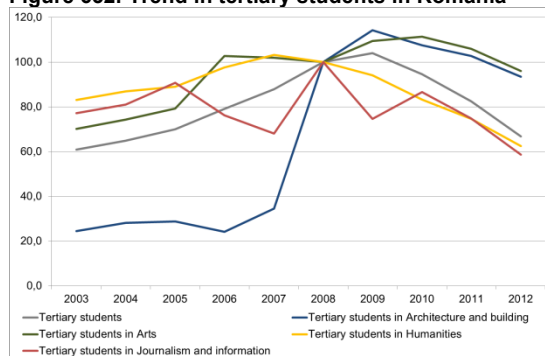
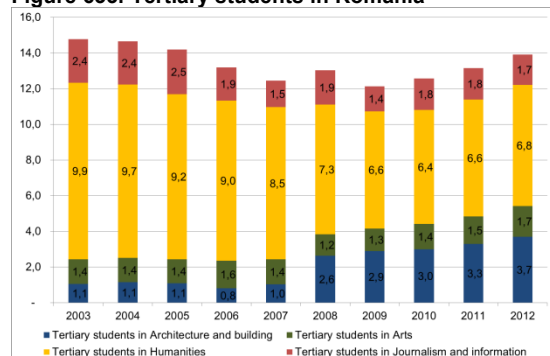


Figure 633. Tertiary students in Romania



Source: Eurostat

Employment and Young employment

The general trend in employment in the CCSs is similar to the trend registered at national level. Those employed in the CCSs are 0,7% of the total employed (0,4% between young, which is decreasing faster than in other sectors). Due to the reduced number of employees in this sector, it is difficult to conclude if employment in the CCSs in Romania is resilient or not.

Figure 634. Employment and young employment in Romania (Total and in CCSs)

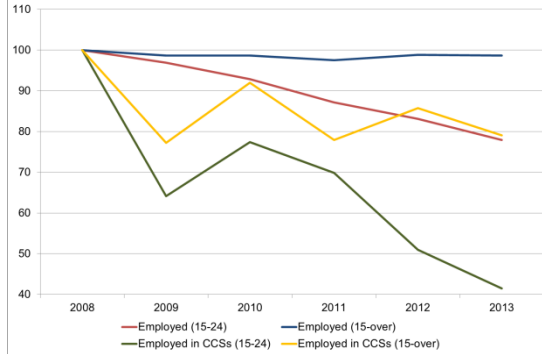
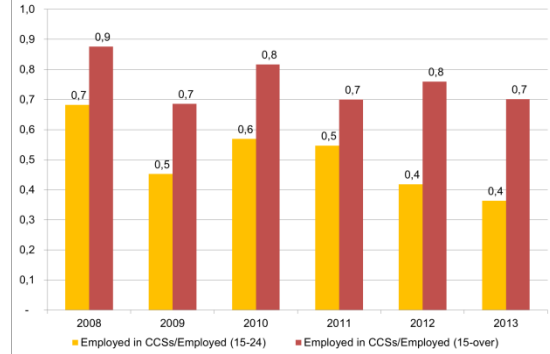


Figure 635. Composition of Employed in CCSs on total employed in Romania



Source: Eurostat

The indicators below show the trend in the specific CCSs: the largest number of those employed work in “Publishing activities” (NACE 58) that registered a positive trend in the last 6 years. Those employed in “Programming and broadcasting activities” (NACE 60) are decreasing from 2011 (they represent 0,16% of the total employed). “Creative, arts and entertainment activities” (NACE 90) has registered a more stable trend from 2008, while “Libraries, archives, museums and other cultural activities” (NACE 91) follow the same direction as the general one.

Figure 636. Trend in Employment in CCSs for sector of activity in Romania

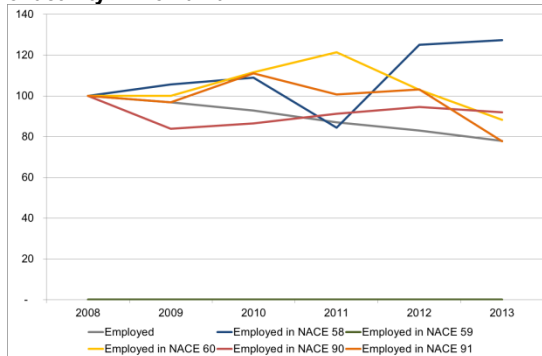
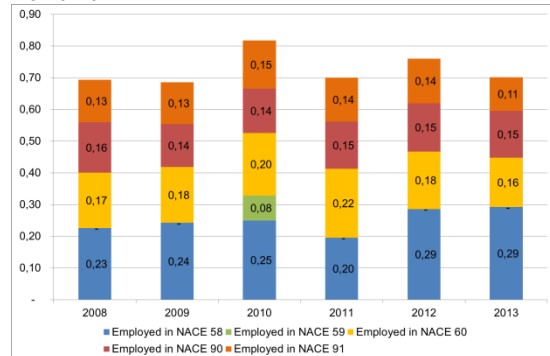


Figure 637. Composition of employed in CCSs in Romania



Source: Eurostat

It is difficult to find an answer to the question for “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) due to the lack of data and the reduced number of young employed.

ICT

The ICT sector is not significantly developed in Romania compared to other European countries. The number of mobile subscriptions are 105,6 every 100 inhabitants and the fixed telephone subscriptions have remained stable in the last decade. The broadband reach is 17,3% and only 50% of individuals use the Internet.

Figure 638. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Romania

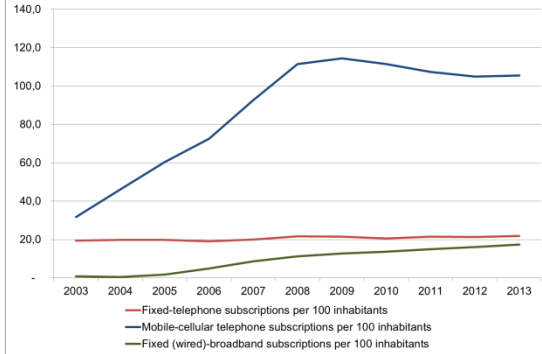
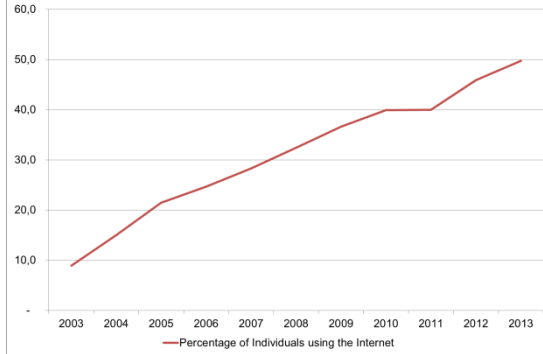


Figure 639. Percentage of Individuals using the Internet in Romania



Source: Eurostat

Employees in ICT represent 1,1% of the total employed. Most of them (0,6%) are employed in “Telecommunications” (NACE 61), which has increased in the last few years, while “Information service activities” (NACE 63) registers a fast growth and “Computer programming, consultancy and related activities” (NACE 62) is slightly dropping.

Figure 640. Trend in ICT Employment in Romania

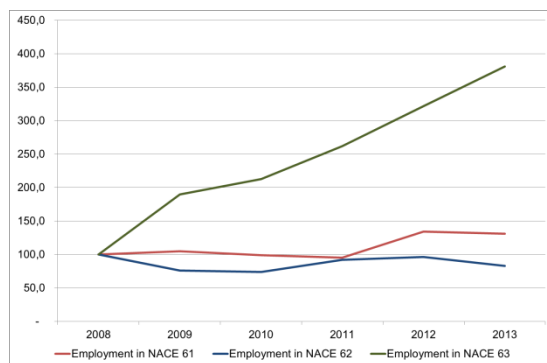
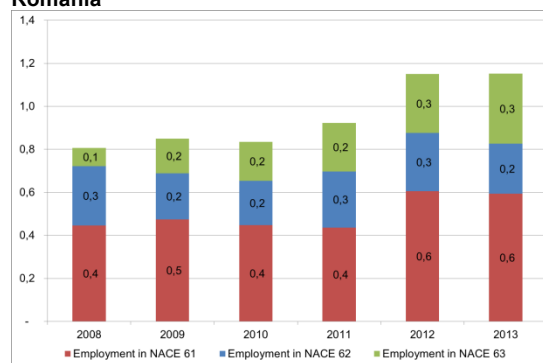


Figure 641. Composition of ICT Employment in Romania



Source: Eurostat

SLOVAKIA

Slovakia is a member of the European Union since 2004 and it belongs to the Schengen area since 2007. Its total population is 4,3 million inhabitants, with a clear growth trend in the last ten years, albeit the fact that the young population is decreasing. Labour force follows the same pattern: total labour force is slightly growing, but among youth the rates are negative.

Figure 642. Trend in population in Slovakia

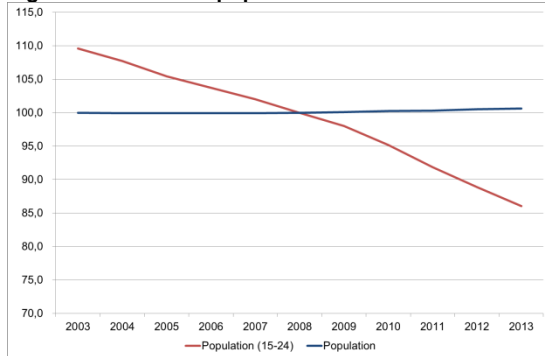
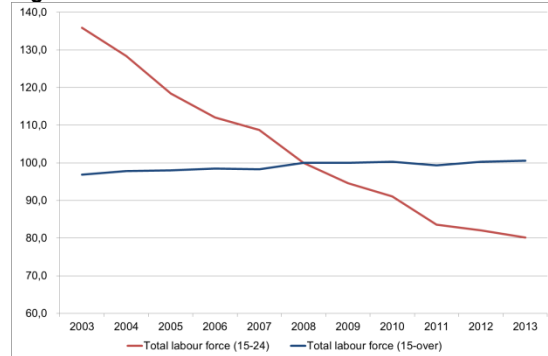


Figure 643. Trend in labour force in Slovakia



Source: Eurostat

The position of Slovakia concerning the crisis is better than that of other European countries. After 2009, the economy started to grow and in 2013 the GDP rose 11,6%. A positive trend is also registered as regards general government expenditure, that has risen 24,1% from 2009.

Figure 644. Trend in GDP in Slovakia

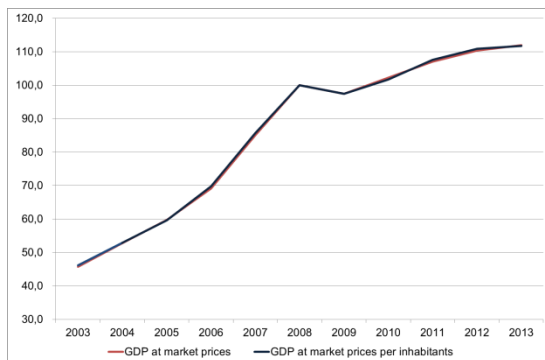
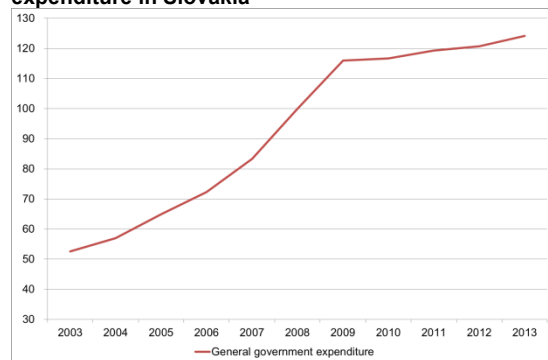


Figure 645. Trend in general government expenditure in Slovakia



Source: Eurostat

While in the past decade the general economy has grown, the labour market has changed: after 2008 employment decreased (with loss of 4,3%) but self-employment has increased (with a rise of 8,5%). The situation for young people is negative both for the employed and self-employed, in consonance with the trend in other European countries.

Figure 646. Trend in employment in Slovakia

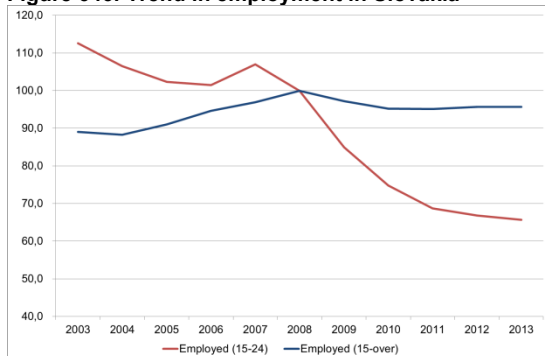
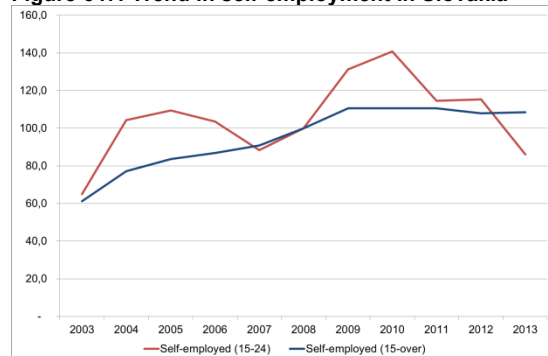


Figure 647. Trend in self-employment in Slovakia



Source: Eurostat

Social environment

The situation of female employment is shown below. Women involved in the labour market in 2013 are 3,3% less than they were in 2008 and their participation in labour market shows only a very slight decrease.

Figure 648. Trend in Female employment in Slovakia

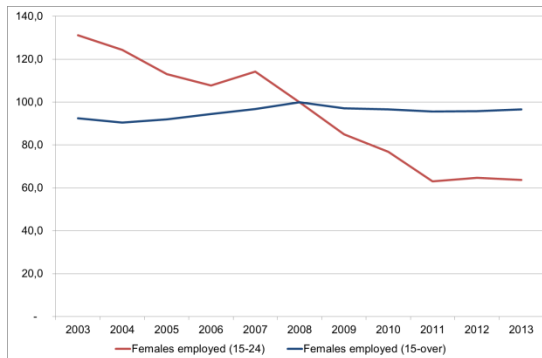
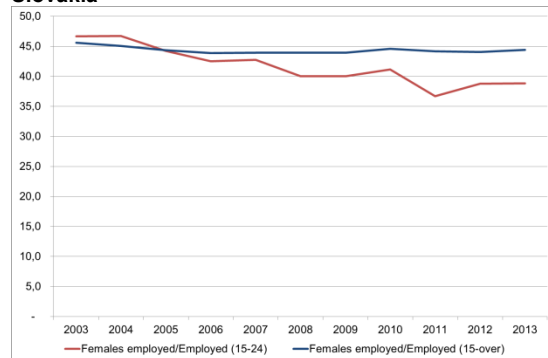


Figure 649. Female participation to labour market in Slovakia



Source: Eurostat

Acquisition of new citizenship has significantly decreased from 2007 and the crime rate has been reduced since 2009.

Figure 650. Acquisition of Citizenship in Slovakia

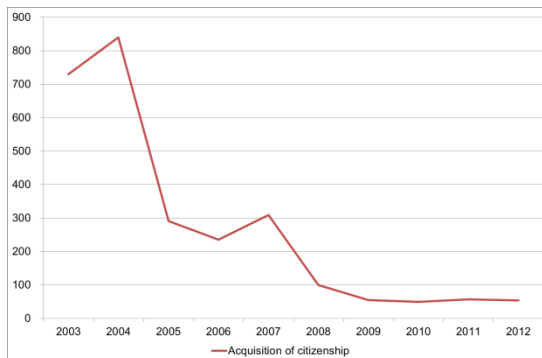
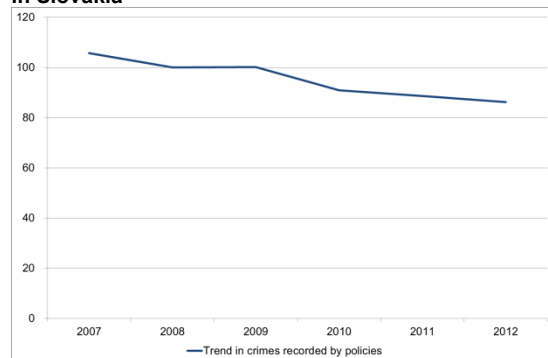


Figure 651. Trend in crimes recorded by the police in Slovakia



Source: Eurostat

The social policies for young people seem to be quite ineffective: while the risk of poverty and exclusion has grown in the last years, the rate of early school leavers remains as it was in 2007.

Figure 652. Young people at risk of poverty or exclusion in Slovakia

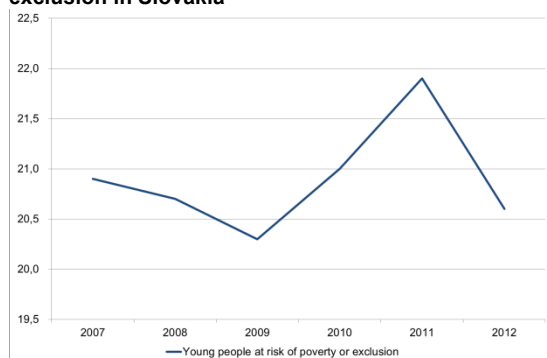
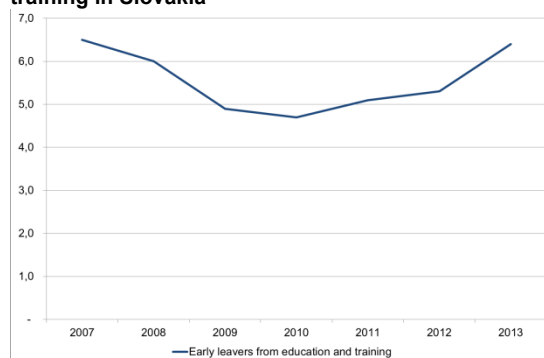


Figure 653. Early leavers from education and training in Slovakia



Source: Eurostat

The general trust level of the population is high: 94,9% declare to have a strong familiar relationship and to trust closer friends. 31,6% of them participate in voluntary activities (28,3% among young) and 8,1% participate in activities related to charitable organizations.

Table 68. Other trust indicators in Slovakia

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		94,9
Participation in informal voluntary activities	Adult	31,6
Participation in informal voluntary activities	Young	28,3
Participation in activities of charitable organisations		8,1

Source: Eurostat

Culture and Creativity

The CCSs in Slovakia follow the general positive trend. The GDP in CCSs is growing very fast after the crisis and its contribution to the general economy is stable.

Figure 654. Trend of GDP in CCSs in Slovakia

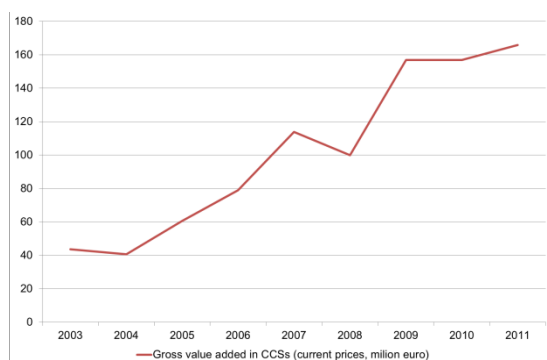
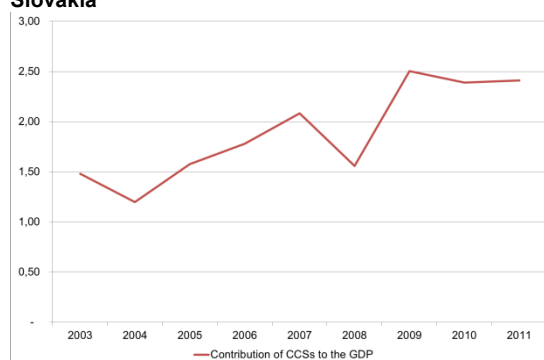


Figure 655. Contribution of CCSs to the GDP in Slovakia



Source: Eurostat

In 2012, public expenditure in culture was higher than in 2007, but after 2010 the situation has changed. In fact, the total of cultural expenditure has, in comparison with general public expenditure, followed the same trend: growing from 2007 to 2010 and decreasing during the last years. However, the long term tendency is negative: in 2003 the public cultural expenditure was 3% and in 2012 it had been reduced to 2,58% of total budget.

Figure 656. Trend in public expenditure in Culture in Slovakia

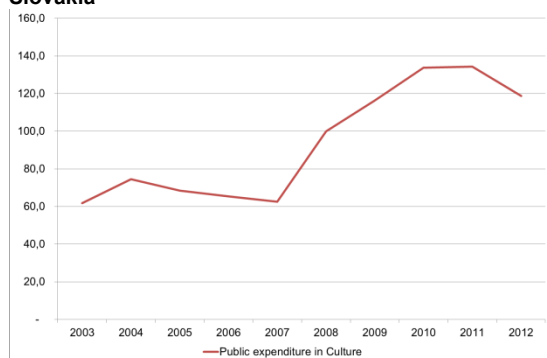
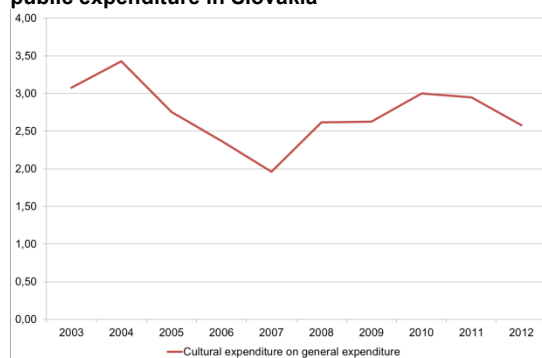


Figure 657. Public cultural expenditure on total public expenditure in Slovakia



Source: Eurostat

Demand and Supply of Culture and Creativity

There are 5 UNESCO cultural sites and 85 museums (1,39 per 100.000 inhabitants) in Slovakia.

Table 69. Number of UNESCO cultural sites and museums in Slovakia

Description	Year	Number
UNESCO cultural sites	2013	5
Museums	2003	85

Source: Eurostat, EGMUS

Cultural behaviours are presented by the following indicators: 51,6% attend live performances, 35,5% go to the cinema and 44,4% visit cultural sites. About 13% of individuals repeat the experience more than 4 times per year (13,3% live performance, 13,1% cinema, 11,4 cultural sites).

Table 70. Cultural behaviours in Slovakia

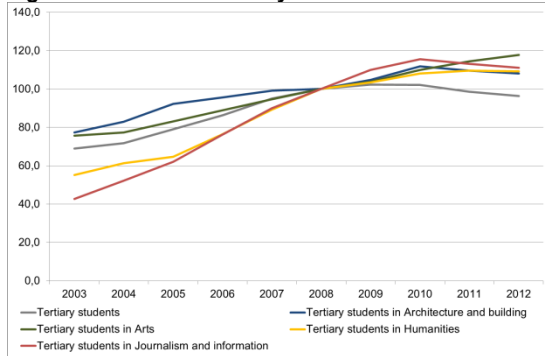
Description	none	1-3	4-6	7-12	more than 12
Times going to live performances	48,4	38,2	9,0	2,6	1,7
Times going to the cinema	64,5	22,1	8,0	3,4	2,0
Visits to cultural sites	55,6	33,0	7,9	2,3	1,2

Source: Eurostat

Education

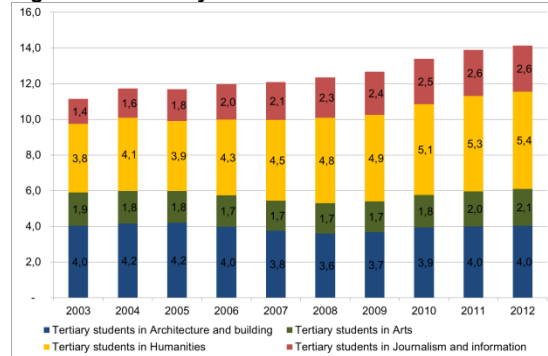
The trend in tertiary students in culture-related subjects is positive. The following data show that the most relevant groups of students are enrolled in the Humanities (5,4% in 2012) and in Architecture and building (4%), followed by students in the Arts (2,1%) and in Journalism and information (2,6%). In general terms, the number of students in culture-related matters is growing faster than in other sectors.

Figure 658. Trend in tertiary students in Slovakia



Source: Eurostat

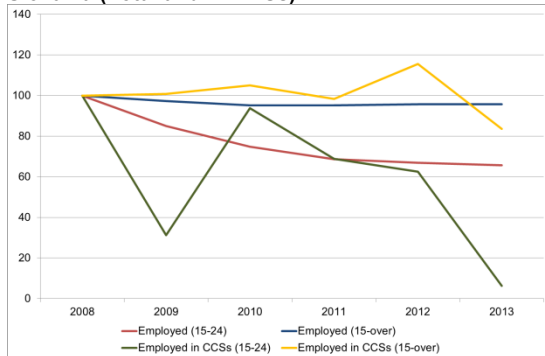
Figure 659. Tertiary students in Slovakia



Employment and Young employment

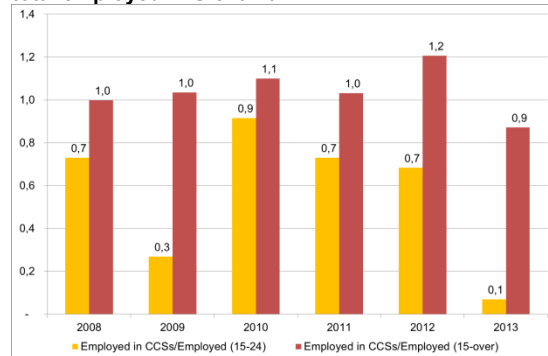
The employment in CCSs is not very high: in Slovakia less than 1% of the total employed works in the CCSs. The general trend is positive though, but from 2012 its direction is inverting.

Figure 660. Employment and young employment in Slovakia (Total and in CCSs)



Source: Eurostat

Figure 661. Composition of Employed in CCSs on total employed in Slovakia



The lack of data regarding the young makes it difficult to draw a reasoned conclusion but, in general terms, the following charts show that all sectors are growing faster than the general trend. The only exception would be the “Publishing activities” (NACE 58), which is decreasing more than the general trend in 2013. The lack of available indicators for “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) does not allow to define the trend in this specific sector.

Figure 662. Trend in Employment in CCSs for sector of activity in Slovakia

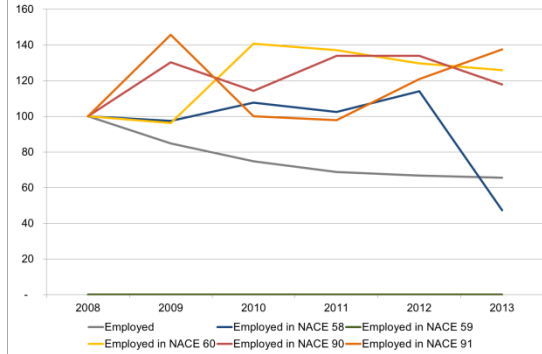
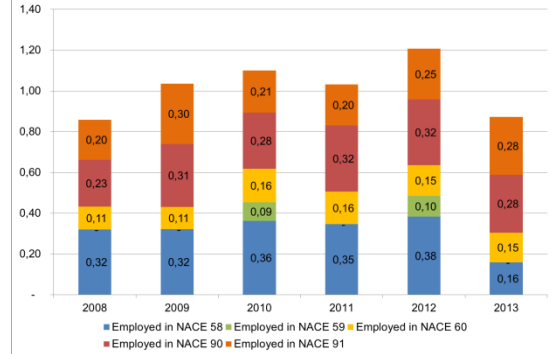


Figure 663. Composition of employed in CCSs in Slovakia



Source: Eurostat

ICT

In 2013 in Slovakia there were 113, per 100 inhabitants, mobile subscriptions. After the beginning of the crisis in 2007, the trend is now growing again, while the number of fixed telephone subscriptions is decreasing. 15,5% of inhabitants have access to the broadband and 78% of the population uses the Internet (in 2013) and is steadily rising.

Figure 664. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Slovakia

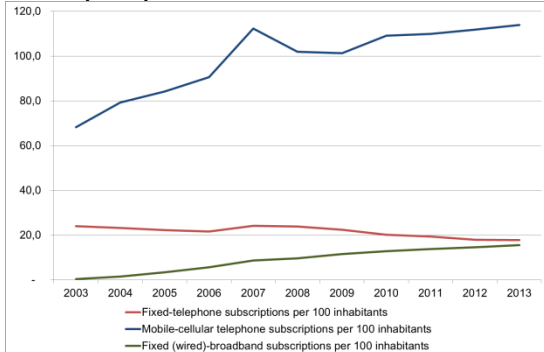
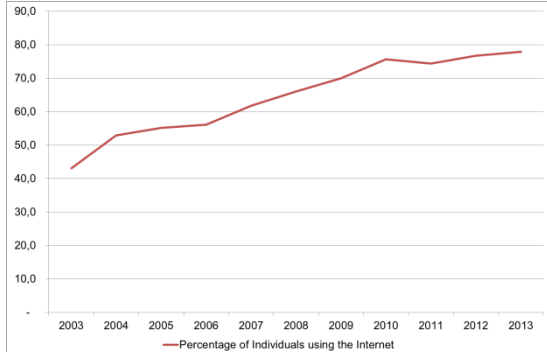


Figure 665. Percentage of Individuals using the Internet in Slovakia



Source: Eurostat

The employment in ICT is shown below: “Telecommunications” (NACE 61) are starting to register a negative trend from 2012, while “Computer programming, consultancy and related activities” (NACE 62) has registered the best performance in the sector. Available data on “Information service activities” (NACE 63) shows a limited number of employees in the sector, with a stable trend in the last 4 years.

Figure 666. Trend in ICT Employment in Slovakia

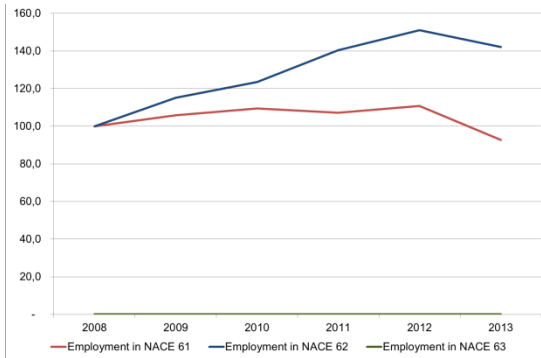
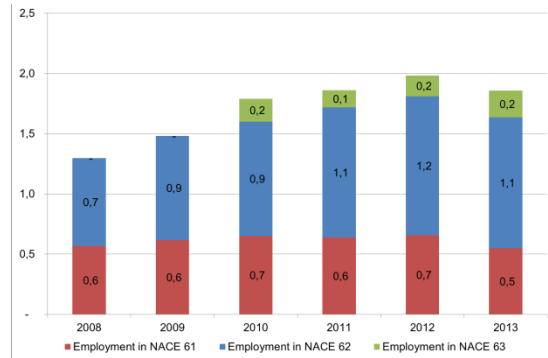


Figure 667. Composition of ICT Employment in Slovakia



Source: Eurostat

SLOVENIA

Slovenia has 2 million inhabitants, is a member of the European Union since 2004 and is part of the Schengen Area since 2007. The population has grown in the past decade but labour force is decreasing due to the negative trend concerning the young population.

Figure 668. Trend in population in Slovenia

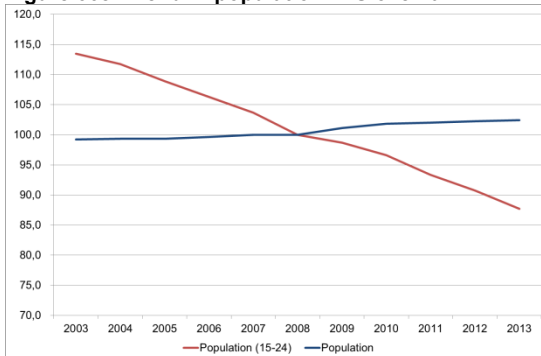
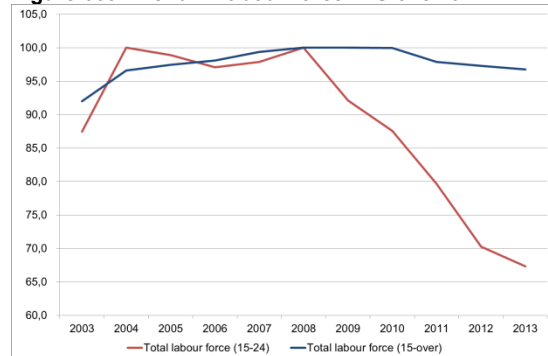


Figure 669. Trend in labour force in Slovenia



Source: Eurostat

The economic growth has remained negative since 2008, with a GDP loss of 4,6% in the last 6 years. In the same period, public expenditure registered an increase of approximately 27%.

Figure 670. Trend in GDP in Slovenia

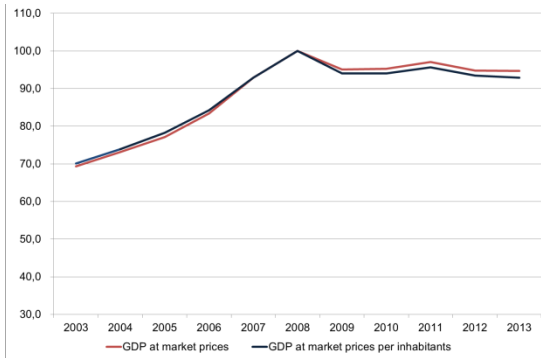
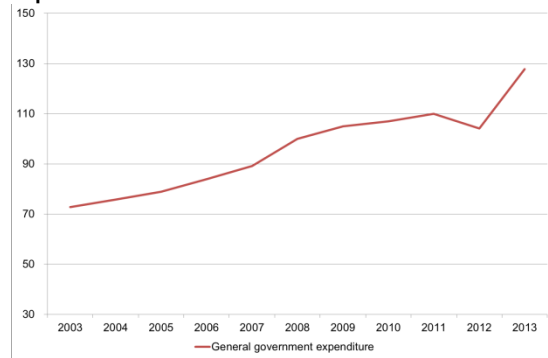


Figure 671. Trend in general government expenditure in Slovenia



Source: Eurostat

Employment has diminished 10% from 2008 and this decrease is around 40% among the young. A similar trend is registered for the self-employed, from 2010.

Figure 672. Trend in employment in Slovenia

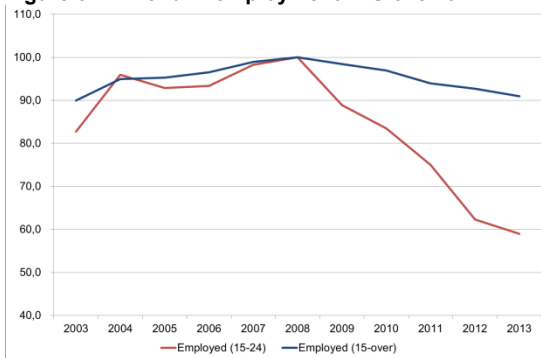
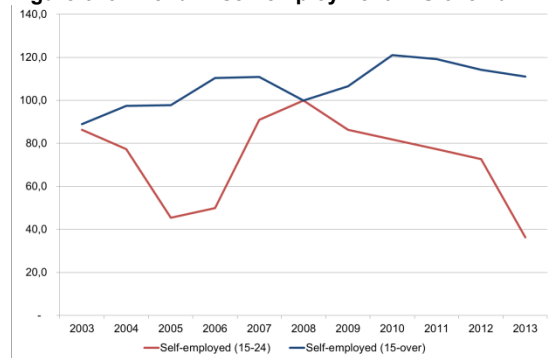


Figure 673. Trend in self-employment in Slovenia



Source: Eurostat

Social environment

The crisis impact is significant for women's employment. Within the last decade, their situation is worse than the general state of employment, and as a consequence, participation of women in the labour market is lower. The rate of adult women employed is 45,4%, while among young females the rate is 41,1%.

Figure 674. Trend in Female employment in Slovenia

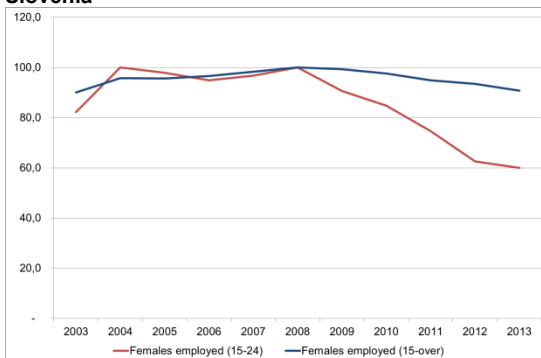
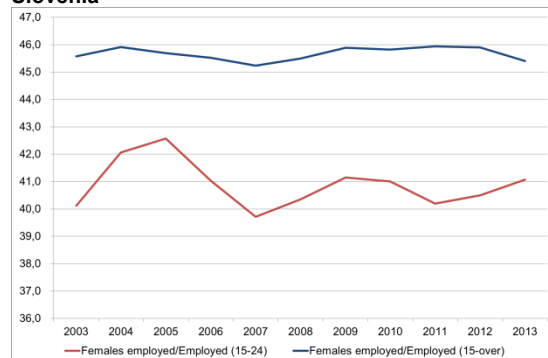


Figure 675. Female participation to labour market in Slovenia



Source: Eurostat

Since 2006, policies for new citizenship acquisition are more restricted and the figures are quite stable. At the same time, criminal activities recorded by the police are progressively increasing.

Figure 676. Acquisition of Citizenship in Slovenia

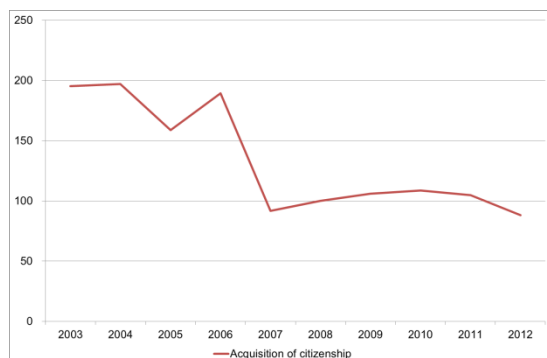
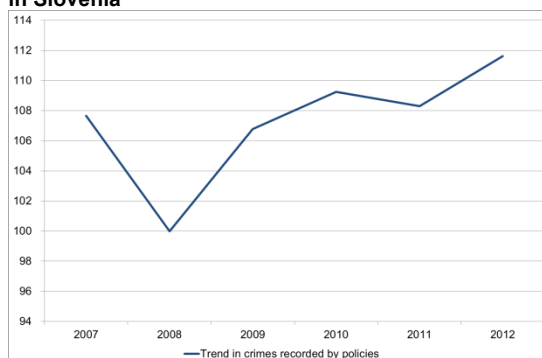


Figure 677. Trend in crimes recorded by the police in Slovenia



Source: Eurostat

The social context for young people at risk of poverty or exclusion is negative and the figures have, in the last 4 years, increased. On the other hand, a positive evolution is registered regarding early school leavers, as the figures are going down.

Figure 678. Young people at risk of poverty or exclusion in Slovenia

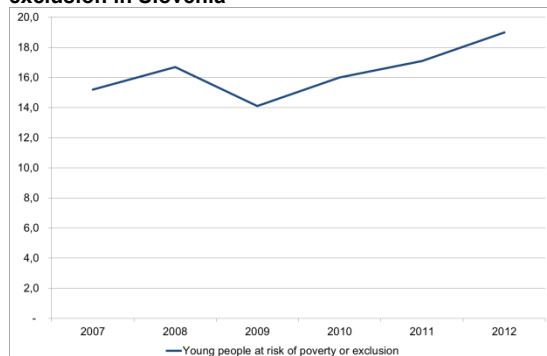
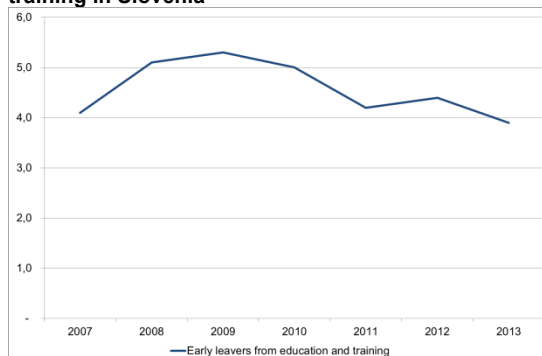


Figure 679. Early leavers from education and training in Slovenia



Source: Eurostat

Among the Slovenians trust in relatives and friends is very high: 95,1% have strong familiar relationships. Between 69,2% and 75,4% of the population, especially young, participates in voluntary activities, although only 12,3% participates in charitable organisations activities.

Table 71. Other trust indicators in Slovenia

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		95,1
Participation in informal voluntary activities	Adult	69,2
Participation in informal voluntary activities	Young	75,4
Participation in activities of charitable organisations		12,3

Source: Eurostat

Culture and Creativity

The data on CCSs are quite negative in the last few years: GDP has decreased about 2% and the contribution of the sector to the general economy has diminished due to the growth in total GDP.

Figure 680. Trend of GDP in CCSs in Slovenia

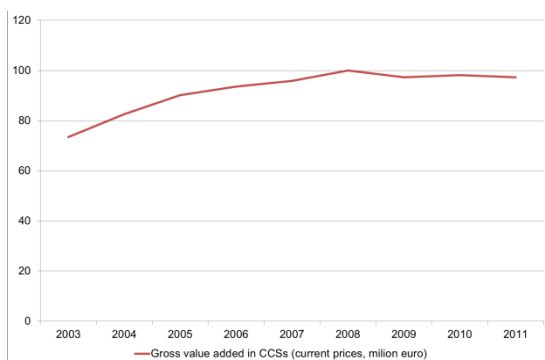
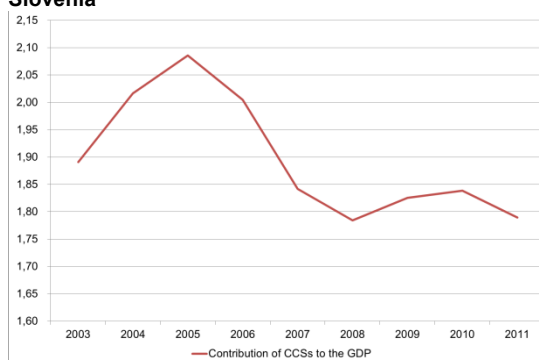


Figure 681. Contribution of CCSs to the GDP in Slovenia



Source: Eurostat

The following charts show public expenditure in culture. While the amount of public expenditure has decreased in the last 3 years, after a period of growth from 2003 to 2010, the real impact of public budget on the cultural sector has been stable in the first part of the past decade, but is decreasing from 2010. These figures highlight that public policies are progressively diminishing their commitment to the cultural sector.

Figure 682. Trend in public expenditure in Culture in Slovenia

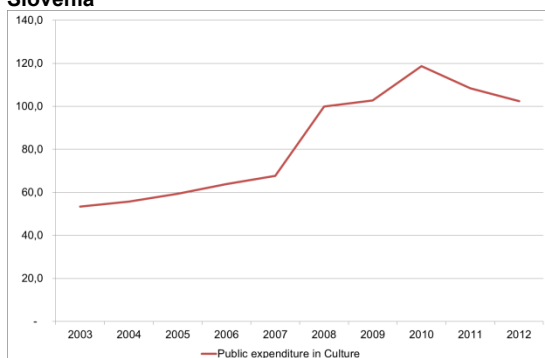
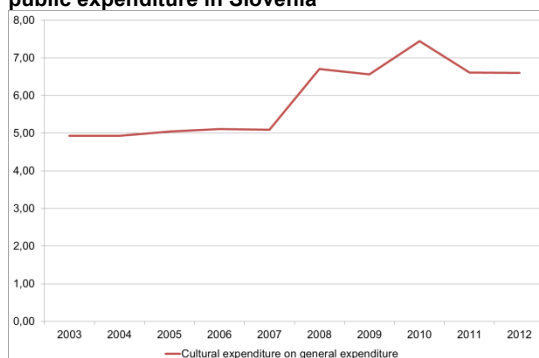


Figure 683. Public cultural expenditure on total public expenditure in Slovenia



Source: Eurostat

Demand and Supply of Culture and Creativity

In Slovenia there are 2 UNESCO cultural sites and 177 museums.

Table 72. Number of UNESCO cultural sites and museums in Slovenia

Description	Year	Number
UNESCO cultural sites	2013	2
Museums	2006	177

Source: Eurostat, EGMUS

Less than 40% of the Slovenian population has built strong cultural habits: the rate of individuals attending live performances is 38,6% (15,9% attend more than 4 times a year), 30,9% of individuals go to cinema (among them, almost half of them it 4 or more times a year) and 39,5% visit cultural sites (but only 12,4% repeat the experience on regular basis).

Table 73. Cultural behaviours in Slovenia

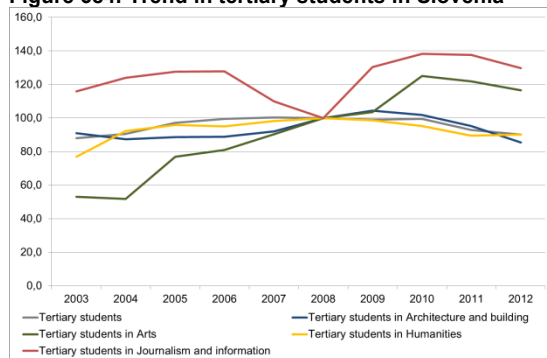
Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	61,3	22,7	9,2	4,6	2,1
Times going to the cinema	69,1	16,7	7,9	3,6	2,7
Visits to cultural sites	60,6	27,1	7,2	2,9	2,3

Source: Eurostat

Education

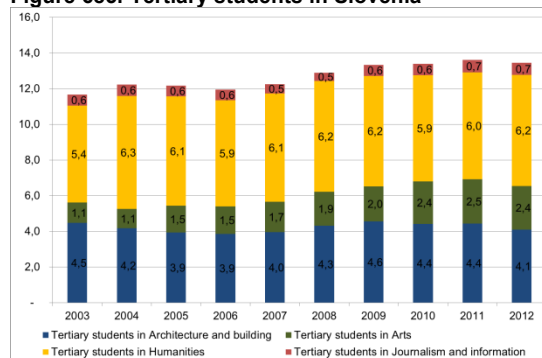
The number of tertiary students in culture-related subject has, in the last decade, risen. A more dynamic trend is registered by students in the Arts: during 2013, their number has doubled when compared to 2003. The largest number of students belongs to the Humanities (6,2% in 2013) and to Architecture and building (4,1% in 2013), followed by Journalism and information (0,7% of the total students). Except for the Humanities, the number of students in other culture-related subject has increased if compared to the general trend.

Figure 684. Trend in tertiary students in Slovenia



Source: Eurostat

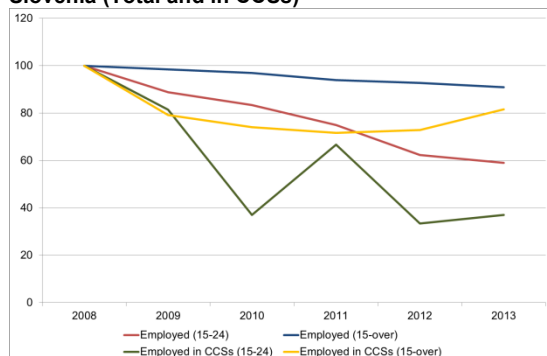
Figure 685. Tertiary students in Slovenia



Employment and Young employment

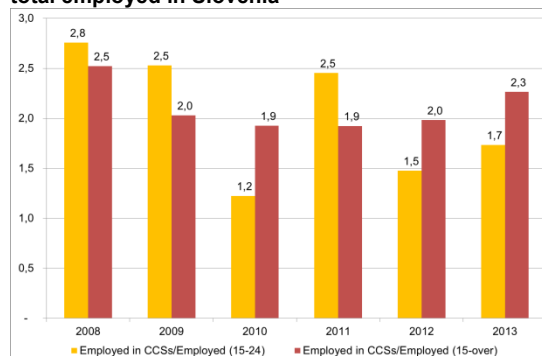
Employment in the CCSs represents 2,3% of total employment (1,7% among the young in 2013). The following charts show that the general trend is negative: employment in the CCSs is decreasing faster than the general trend both for adults and young, although it seems to be inverted and growing faster among adults in the last year.

Figure 686. Employment and young employment in Slovenia (Total and in CCSs)



Source: Eurostat

Figure 687. Composition of Employed in CCSs on total employed in Slovenia



The following graphs point out that the negative trend in CCSs employment is due to the negative performance of "Publishing activities" (NACE 58), while other sectors like "Libraries, archives, museums and other cultural activities" (NACE 91) are quite stable, or even increasing like the "Creative, arts and entertainment activities" sector (NACE 90). The

number of employed in “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) is limited (0,11% of total employed) and this is the reason why these figures seem the most dynamic of all.

Figure 688. Trend in Employment in CCSs for sector of activity in Slovenia

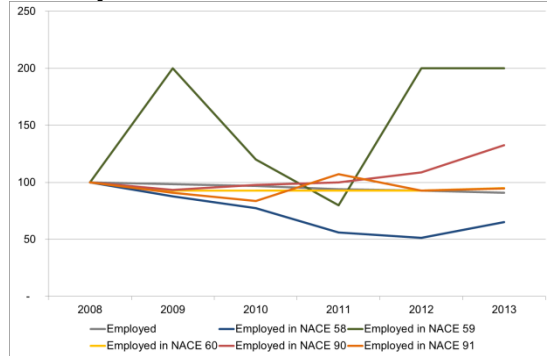
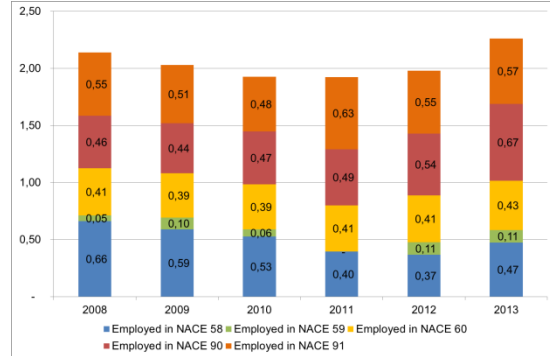


Figure 689. Composition of employed in CCSs in Slovenia



Source: Eurostat
*trend of NACE 59 in 2011 is estimated

The lack of data in the CCSs for youth makes it impossible to give an overview of the trend in the last 6 years.

ICT

The charts below show the evolution of ICT in Slovenia. Like in many European countries, the number of mobile and broadband subscriptions has grown in the last decade, while the number of fixed telephone subscriptions has decreased. The individuals using the Internet in 2013 were 72,7% versus 31,9% in 2003.

Figure 690. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Slovenia

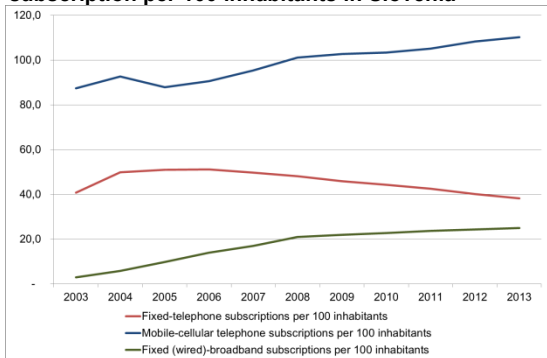
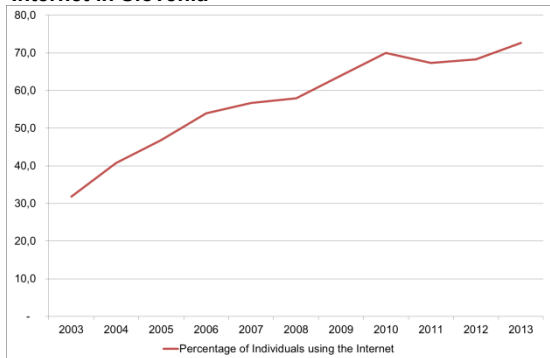


Figure 691. Percentage of Individuals using the Internet in Slovenia



Source: Eurostat

The rate of employment in the ICT is better than the general one: employment is growing especially in “Computer programming, consultancy and related activities” (NACE 62), with the highest number of employed in the ICT (1,3% in 2013). Employment in “Telecommunications” (NACE 61) has also grown in the last year, while the limited number of those in “Information service activities” (NACE 63) remains quite stable.

Figure 692. Trend in ICT Employment in Slovenia

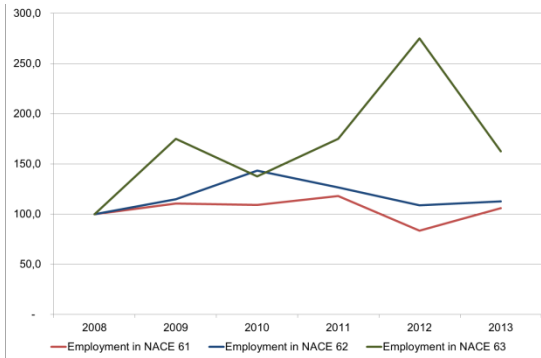
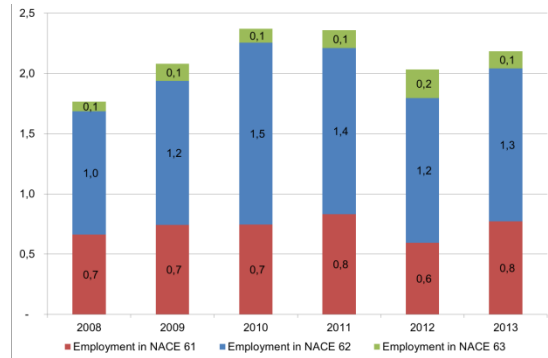


Figure 693. Composition of ICT Employment in Slovenia



Source: Eurostat

SPAIN

Spain is a member of European Union from 1986 and belongs to the Schengen Area since 1991. The population has grown in the last decade and reached 45,8 millions of people in 2013. On the other hand, the young population is decreasing (around 10%) and the labour force is slightly increasing due to an ageing population.

Figure 694. Trend in population in Spain

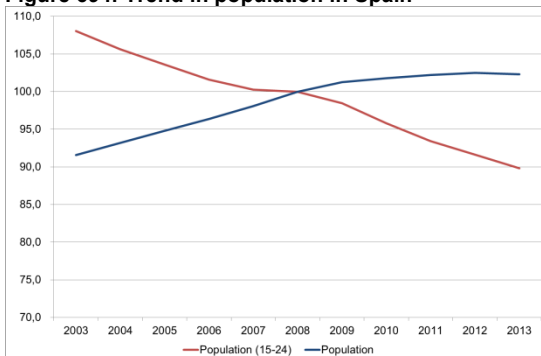
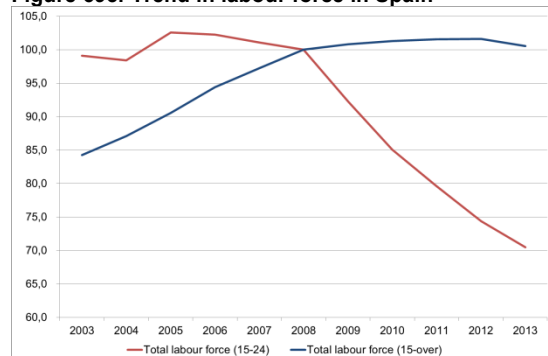


Figure 695. Trend in labour force in Spain



Source: Eurostat

The economic crisis in Spain has been stronger than in other countries. GDP registered a fall of 6,7% in the last 6 years and public budget policies are restricting public expenditure, which remains stable since 2009.

Figure 696. Trend in GDP in Spain

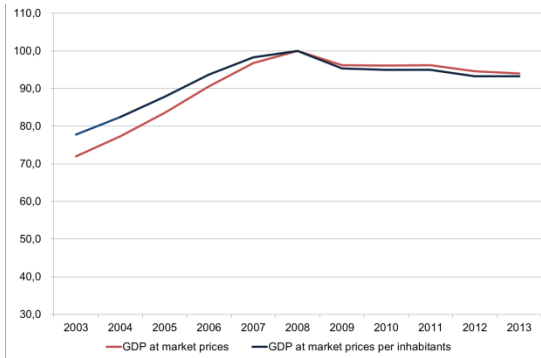
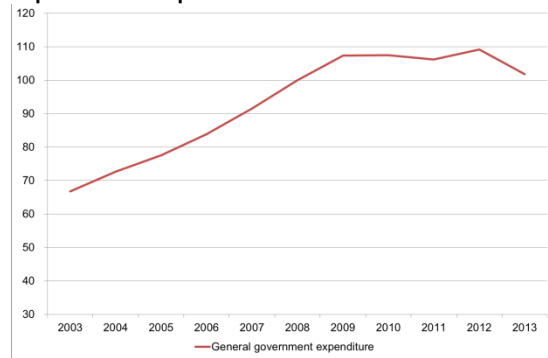


Figure 697. Trend in general government expenditure in Spain



Source: Eurostat

The trends in employment and self-employment are negative: the employment rate registered a loss of 16,3% from 2008 (38,4% among youth) and self-employment lost a 13% in the same period (43,3% among young people).

Figure 698. Trend in employment in Spain

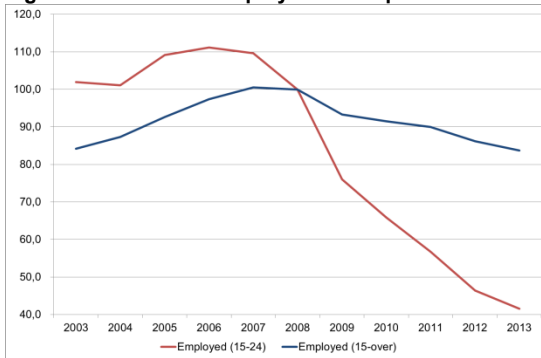
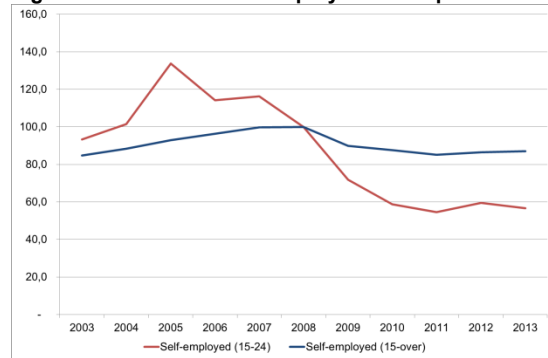


Figure 699. Trend in self-employment in Spain



Source: Eurostat

Social environment

The rate of women in the labour market is increasing, as the decrease rate is slower than the general one. This trend is registered for both young and adults: in 2013, adult women are 45,6% of the total employed and young women represent a 47,6% of the total employed.

Figure 700. Trend in Female employment in Spain

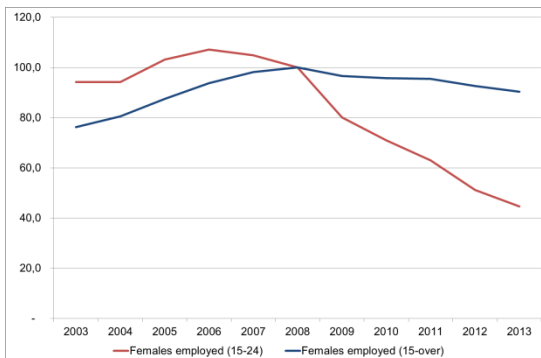
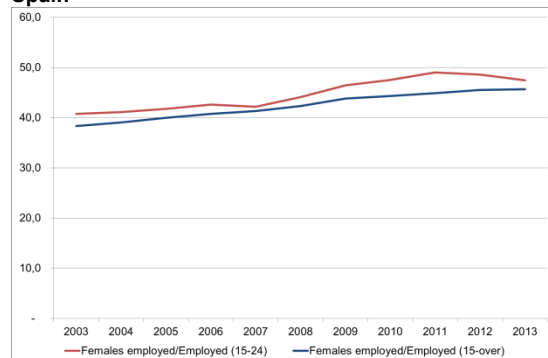


Figure 701. Female participation to labour market in Spain



Source: Eurostat

After 2010, there has been a recess regarding new acquisitions of citizenship that inverted the trend existing between 2003 and 2010. Within the same period, criminal activities recorded have also decreased.

Figure 702. Acquisition of Citizenship in Spain

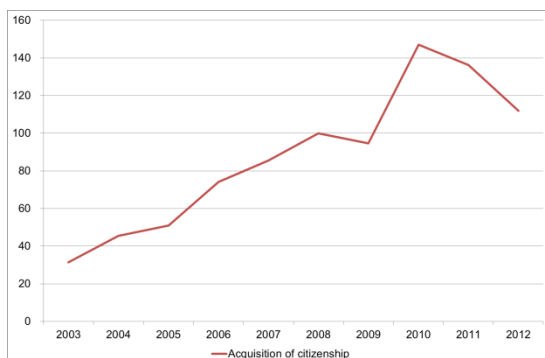
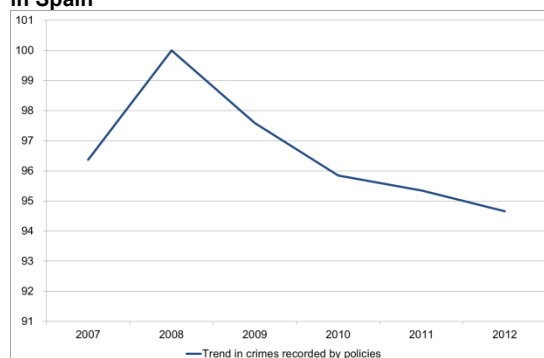


Figure 703. Trend in crimes recorded by the police in Spain



Source: Eurostat

The economic crisis affects dramatically the young population, but some social policies seem to be effective: the number of young people at risk of exclusion is increasing, but the number of early school leavers is going down.

Figure 704. Young people at risk of poverty or exclusion in Spain

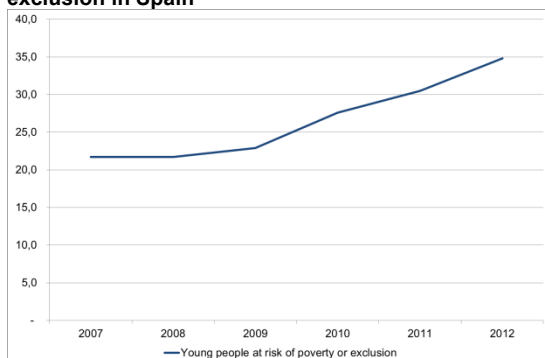
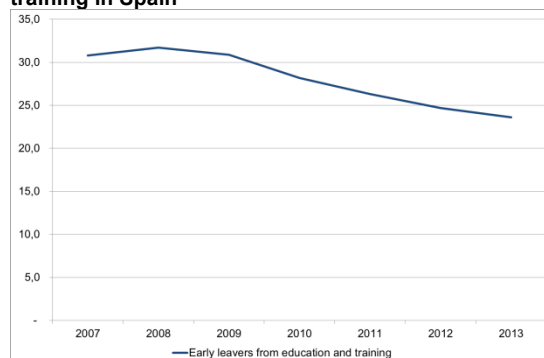


Figure 705. Early leavers from education and training in Spain



Source: Eurostat

Trust in the value of family is strong, as well as is trust in friends and other close relationships. The number of individuals that participate in voluntary activities is 45,1% (41,3% among young) and 11,3% are involved in charitable activities.

Table 74. Other trust indicators in Spain

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		96,3
Participation in informal voluntary activities	Adult	45,1
Participation in informal voluntary activities	Young	41,3
Participation in activities of charitable organisations		11,3

Source: Eurostat

Culture and Creativity

Data on GDP in the CCSs are available from 2003 to 2009, therefore offering conclusions on the general trend in recent years is quite difficult. The following charts show the growth of GDP between 2003 and 2009, but in the same period the contribution to the national product fluctuated significantly.

Figure 706. Trend of GDP in CCSs in Spain

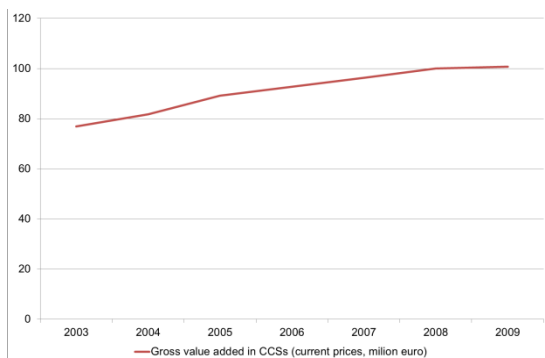
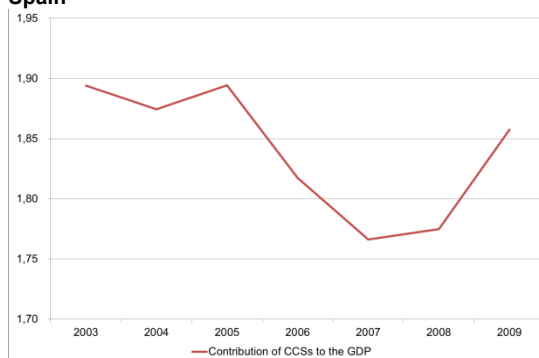


Figure 707. Contribution of CCSs to the GDP in Spain



Source: Eurostat

Regarding public expenditure, there is a dramatic cut in the budget dedicated to culture after 2009 (- 55,1% from 2008). This is one of the sectors that suffered one of the strongest budget resizing: from 6,63% of the total budget in 2008, to 2,73% in 2013.

Figure 708. Trend in public expenditure in Culture in Spain

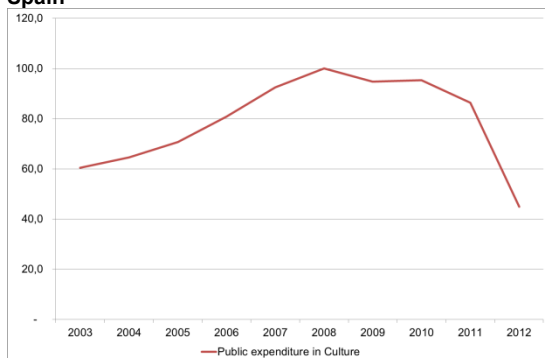
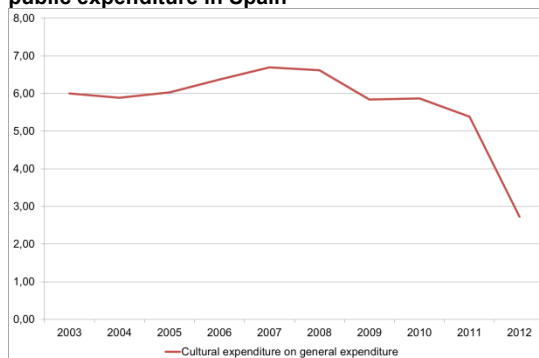


Figure 709. Public cultural expenditure on total public expenditure in Spain



Source: Eurostat

Demand and Supply of Culture and Creativity

In Spain there are 41 UNESCO cultural sites and 1479 museums (2,88 per 100.000 inhabitants).

Table 75. Number of UNESCO cultural sites and museums in Spain

Description	Year	Number
UNESCO cultural sites	2013	41
Museums	2010	1.479

Source: Eurostat, EGMUS

Individuals attending live performances are 35,5%, but only 13,3% do it more than 4 times per year. The percentage of individuals going to cinema is 48,9% and 27,7% of them do it more than 4 times a year. 43,2% of Spaniards visit cultural sites but only 18,2% are frequent attendants.

Table 76. Cultural behaviours in Spain

Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	64,5	22,2	7,4	3,2	2,7
Times going to the cinema	51,1	21,2	10,9	7,5	9,3
Visits to cultural sites	56,8	25,0	9,6	4,3	4,3

Source: Eurostat

Education

The following data show the trend in tertiary student choices: only the number of Art students is growing faster than the general trend (5,5% in 2012 versus 4,1% in 2003), whereas all the figures for other culture-related subjects are growing more slowly. Students in the Arts and the Humanities represent 11% of the total, followed by the students in Architecture (5,2%) and in Journalism and information (1,5%)

Figure 710. Trend in tertiary students in Spain

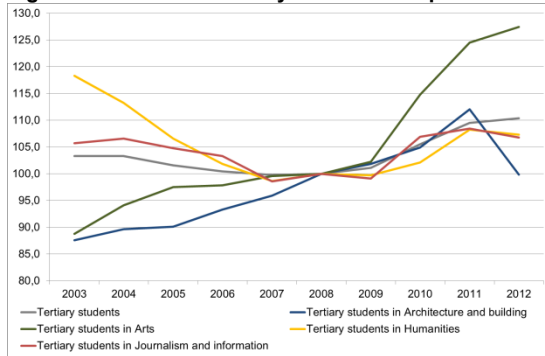
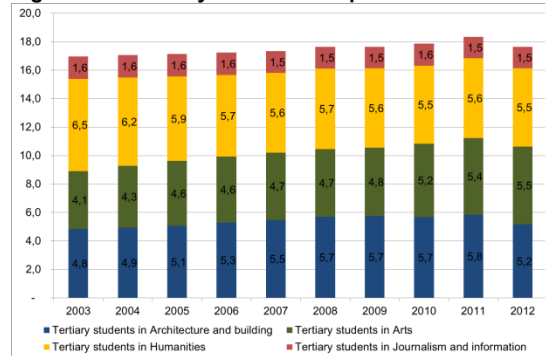


Figure 711. Tertiary students in Spain



Source: Eurostat

Employment and Young employment

The employment in CCSs in Spain is 1,3% of total employment and has been quite stable for the last 6 years. The general trend is weak, but the evolution in the CCSs is worse than in the other sectors.

Figure 712. Employment and young employment in Spain (Total and in CCSs)

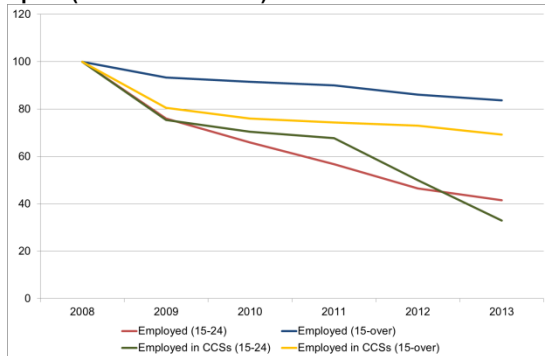
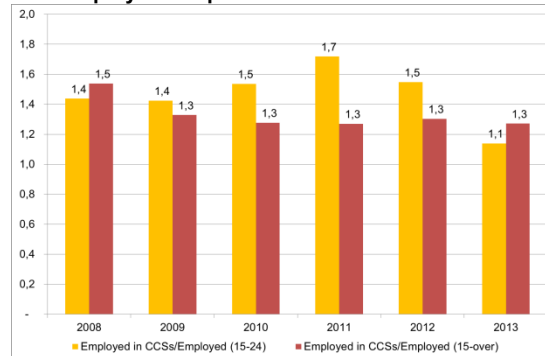


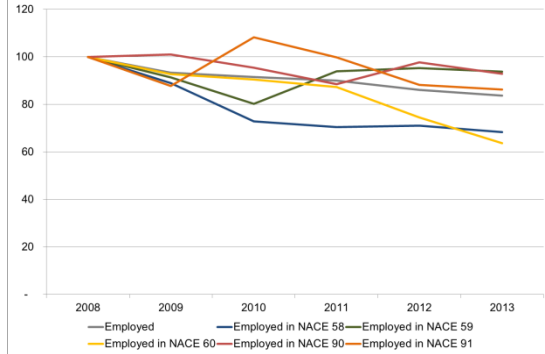
Figure 713. Composition of Employed in CCSs on total employed in Spain



Source: Eurostat

This negative trend is due to the development of the main sectors of activity: “Publishing activities” (NACE 58) and “Programming and broadcasting activities” (NACE 60) are the two sectors which have lost the largest number of employed, while “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59), “Creative, arts and entertainment activities” (NACE 90) and “Libraries, archives, museums and other cultural activities” (NACE 91) have decreased less than the general trend.

Figure 714. Trend in Employment in CCSs for sector of activity in Spain



Source: Eurostat

A similar tendency can be observed in young employment: a negative balance is registered for every sector of activity, but “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) and “Libraries, archives, museums and other cultural activities” (NACE 91) seem to register a better development if compared to other disciplines.

Figure 715. Composition of employed in CCSs in Spain

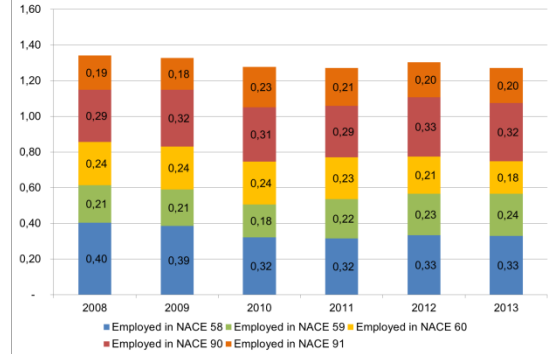
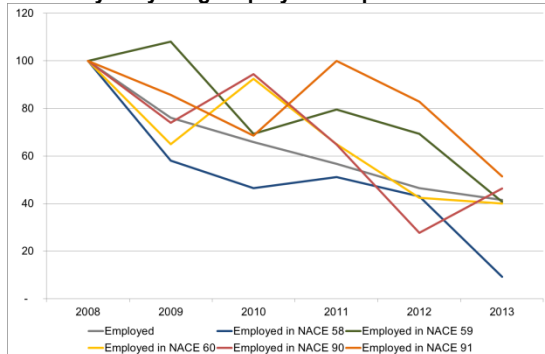
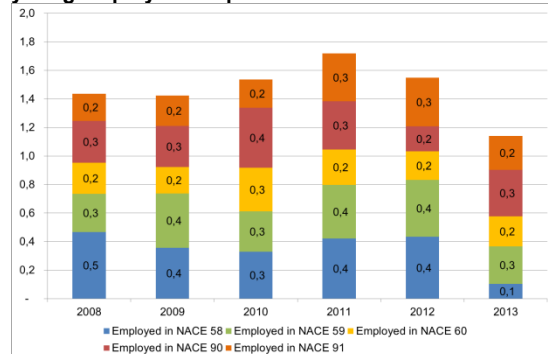


Figure 716. Trend in Employment in CCSs for sector of activity for young employed in Spain



Source: Eurostat

Figure 717. Composition of employed in CCSs for young employed in Spain



ICT

The following charts show the trend in the ICT sector. 70% of Spaniards have access to the Internet (40% in 2003) and the broadband reaches 25% of inhabitants in 2013. Mobile subscriptions grew from 2003 to 2011, but they are starting to decrease, while fixed telephone subscriptions are stable, with a loss of 2% in 11 years.

Figure 718. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Spain

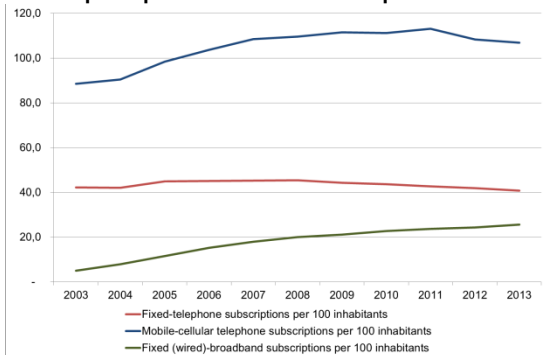
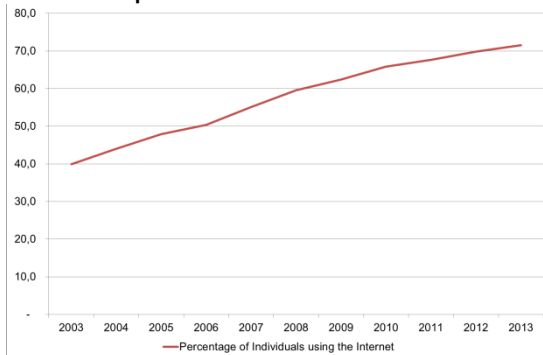


Figure 719. Percentage of Individuals using the Internet in Spain



Source: Eurostat

Those employed in the ICT sector are 2,3% of the total employed in 2013. The trend in ICT employment is displayed in the following charts: the “Computer programming, consultancy and related activities” (NACE 62) is the only sector that despite the economic crisis has kept growing in the last years, while “Telecommunications” (NACE 61) and “Information service activities” (NACE 63) have decreased since 2008, although there is a slightly inverse trend in the last biennium.

Figure 720. Trend in ICT Employment in Spain

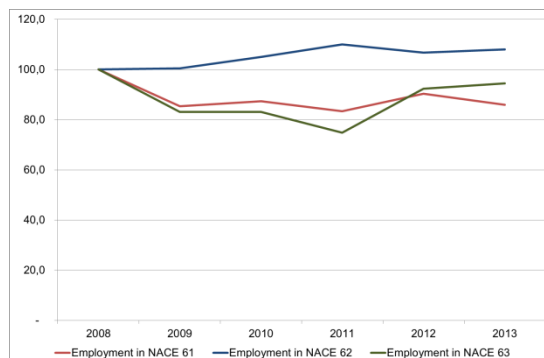
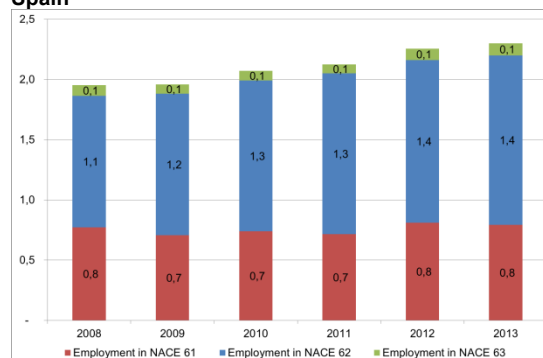


Figure 721. Composition of ICT Employment in Spain



Source: Eurostat

SWEDEN

Sweden became a member of the European Union in 1995 and is part of the Schengen Area since 1996. It has a population of 9,2 million and the trend, shown in the following tables, is positive both for adults and young people; also, the labour force is increasing.

Figure 722. Trend in population in Sweden

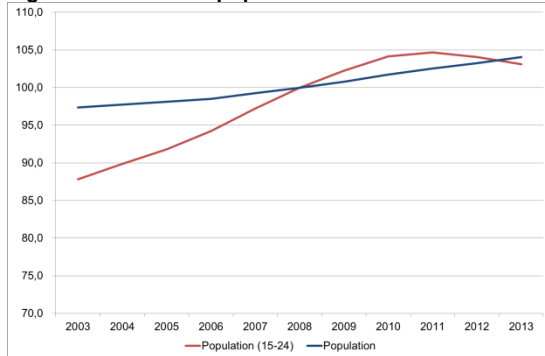
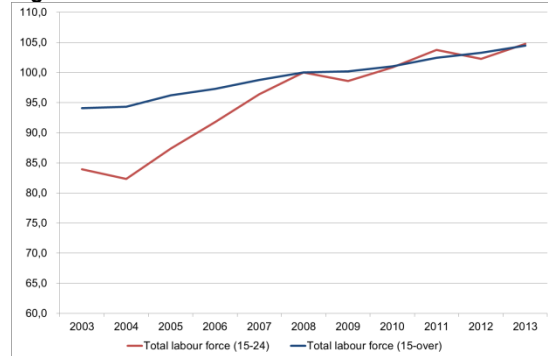


Figure 723. Trend in labour force in Sweden



Source: Eurostat

The crisis in Sweden was especially strong from 2008, with a negative peak registered in 2009. After this period, GDP is growing at a fast rate and the public expenditure is accompanying this trend.

Figure 724. Trend in GDP in Sweden

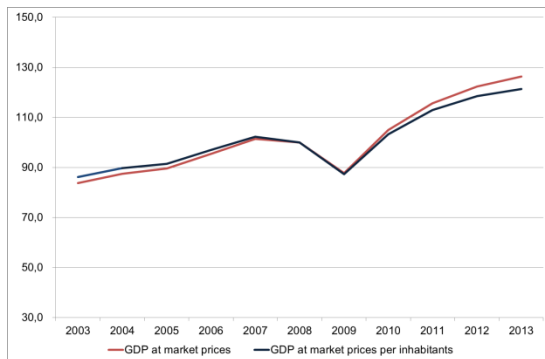
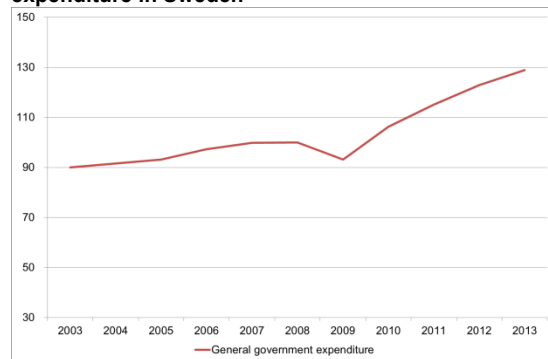


Figure 725. Trend in general government expenditure in Sweden



Source: Eurostat

Employment has increased in the last decade, both for young and adults, and so is self-employment, although a more positive trend is registered among the young.

Figure 726. Trend in employment in Sweden

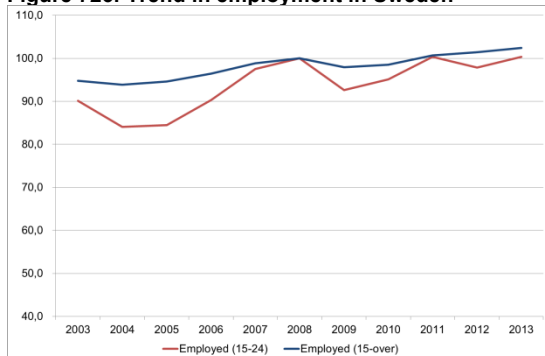
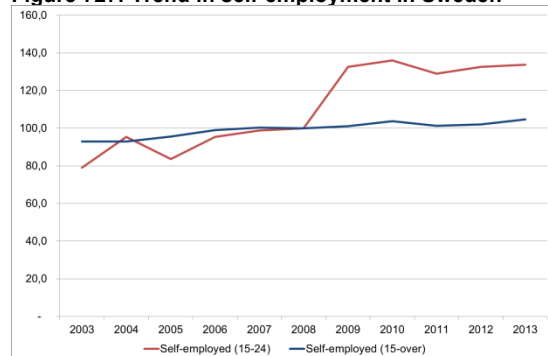


Figure 727. Trend in self-employment in Sweden



Source: Eurostat

Social environment

The participation of women in the labour market is 47,6% in 2012 but is slightly decreasing from 2003. The number of females employed is growing slower than the general trend, but in 2013 the number of young women in the labour market is the same as for men.

Figure 728. Trend in Female employment in Sweden

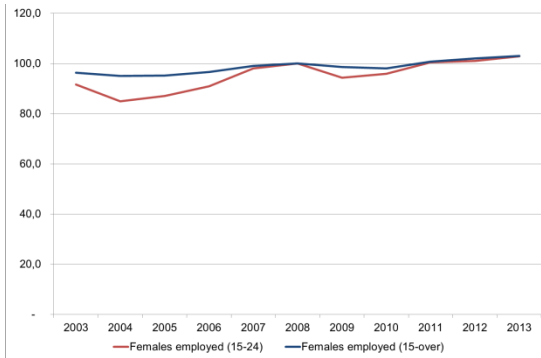
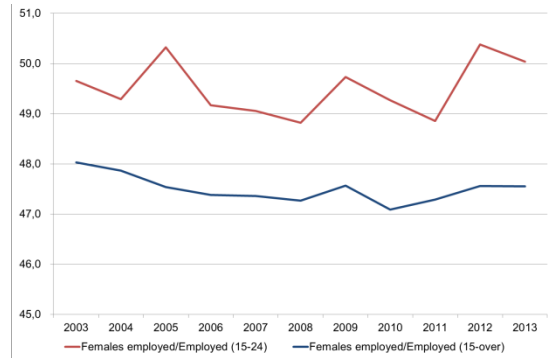


Figure 729. Female participation to labour market in Sweden



Source: Eurostat

In the last decade, the number of new acquired citizenships in Sweden followed a fluctuating trend: it decreased after 2007 and has progressively grown reaching a 64,7% in 2013. From 2007, the crime records are growing, becoming one of the highest in Europe.

Figure 730. Acquisition of Citizenship in Sweden

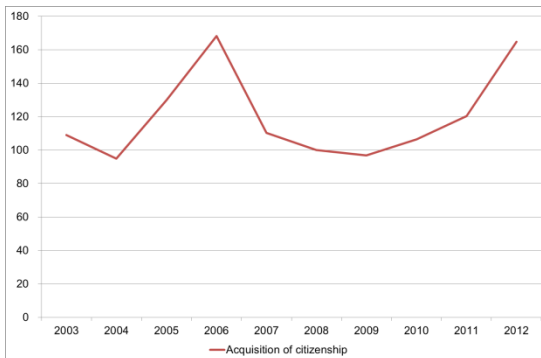
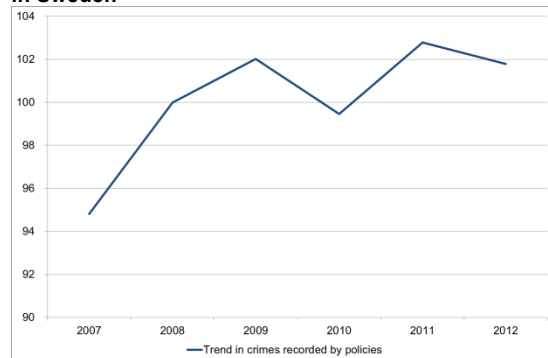


Figure 731. Trend in crimes recorded by the police in Sweden



Source: Eurostat

The risk of poverty between young people is decreasing since 2010 and so it is the number of students dropping early out of the educational system.

Figure 732. Young people at risk of poverty or exclusion in Sweden

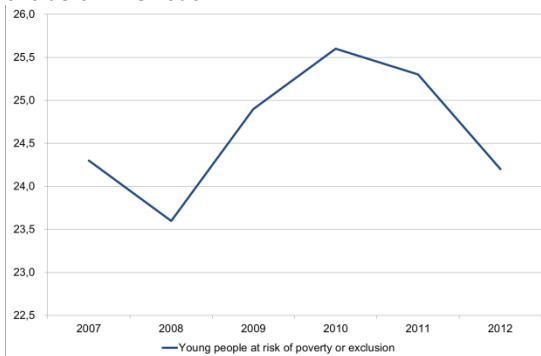
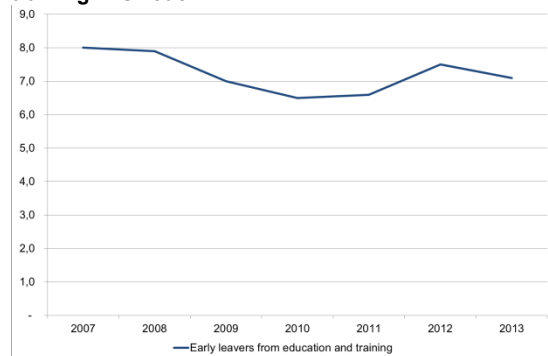


Figure 733. Early leavers from education and training in Sweden



Source: Eurostat

The trust in family and closer friends is high: 96,6% of individuals declare to have a strong trust in close relationships; trust in the private institutions is also high: 36,3% of adults are

involved in voluntary activities (34,8% among young) and 11,7% participate in charitable organizations activities.

Table 77. Other trust indicators in Sweden

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		96,6
Participation in informal voluntary activities	Adult	36,3
Participation in informal voluntary activities	Young	34,8
Participation in activities of charitable organisations		11,7

Source: Eurostat

Culture and Creativity

The contribution of CCSs in the Swedish economy is decreasing from 2011, but the lack of data makes it difficult to identify the evolution in the last biennium.

Figure 734. Trend of GDP in CCSs in Sweden

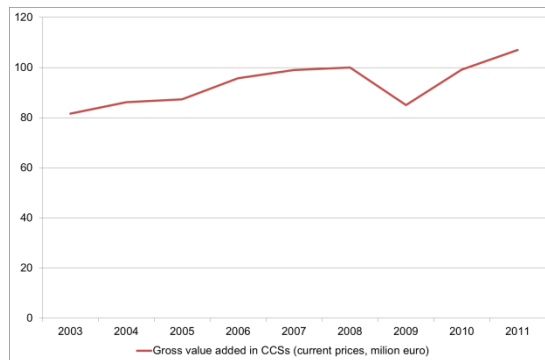
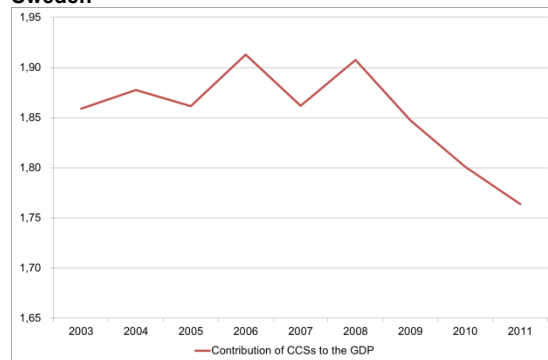


Figure 735. Contribution of CCSs to the GDP in Sweden



Source: Eurostat

The crisis also affected the cultural sector regarding public expenditure. The budget dedicated to culture has decreased since 2008: total budget for culture was 3,25% in 2013.

Figure 736. Trend in public expenditure in Culture in Sweden

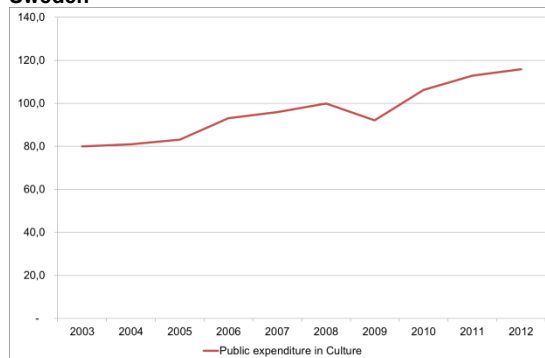
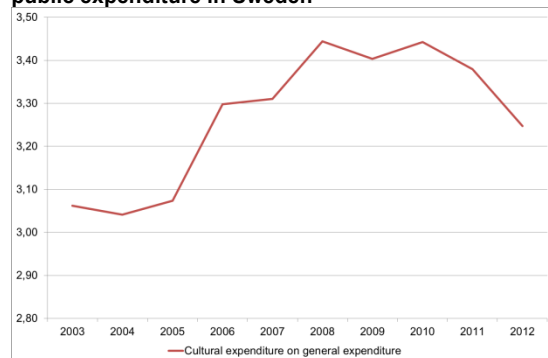


Figure 737. Public cultural expenditure on total public expenditure in Sweden



Source: Eurostat

Demand and Supply of Culture and Creativity

In Sweden there are 14 UNESCO cultural sites and 164 museums (1,5 per 100.000 inhabitants).

Table 78. Number of UNESCO cultural sites and museums in Sweden

Description	Year	Number
UNESCO cultural sites	2013	14
Museums	2011	164

Source: Eurostat, EGMUS

Participation in the cultural life is high: 58,3% attends live performances (19,0% more than 4 times a year); 52,1% goes to the cinema (18,2% does it more than 4 times per year) and 58,3% visits cultural sites (25,6% does it frequently)

Table 79. Cultural behaviours in Sweden

Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	41,7	39,3	11,4	4,8	2,8
Times going to the cinema	47,9	33,9	12,1	4,2	1,9
Visits to cultural sites	41,7	32,7	13,2	7,6	4,8

Source: Eurostat

Education

Students in culture-related areas are growing faster than students in other areas: the largest groups in 2013 are registered in the Humanities (9,1%) and in the Arts (4,3%). The first group increases and the second follows the general trend. The number of students in Architecture and building is growing from 2,6% in 2003 to 3,6% in 2013 and a similar direction is followed by those in Journalism and information, although they are the smallest group (2,1% in 2013).

Figure 738. Trend in tertiary students in Sweden

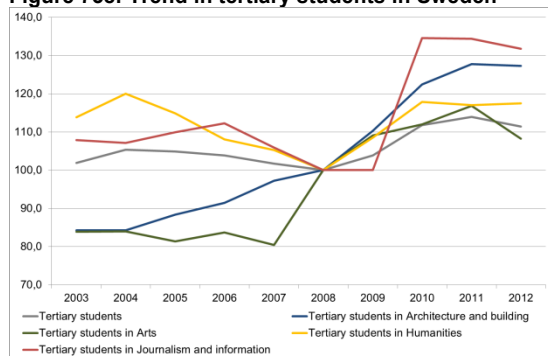
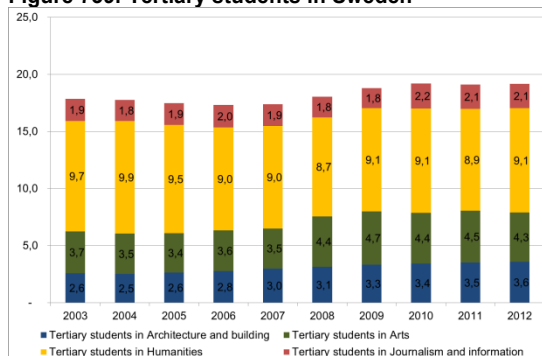


Figure 739. Tertiary students in Sweden



Source: Eurostat

Employment and Young employment

The employed in the CCSs were 2,3% of the total employed in 2013 (2% among the young) and are decreasing faster than in the total labour market. Unfortunately, both for adults and young, the trend is lower than in other sectors.

Figure 740. Employment and young employment in Sweden (Total and in CCSs)

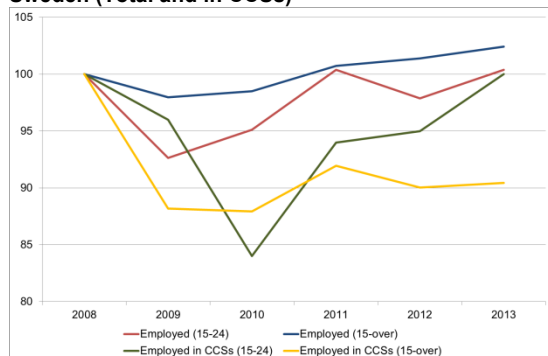
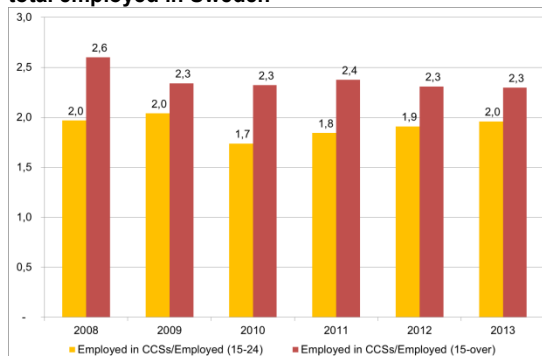


Figure 741. Composition of Employed in CCSs on total employed in Sweden



Source: Eurostat

The situation in the different sectors is displayed in the following charts: those employed in “Motion picture, video and television program production, sound recording and music publishing activities” (NACE 59) represent 0,31% of the population, but numbers are growing faster than in the other sectors; “Creative, arts and entertainment activities” (NACE 90) represent 0,65% and show a better evolution than the national average; “Programming and broadcasting activities” (NACE 60) are a minority (0,16%) but have a positive trend from 2008. On the other hand, most of the employed in the CCSs belong to the “Publishing activities” (NACE 58) but this sector shows a negative evolution (from 0,89% in 2008 to 0,74% in 2013), and the “Libraries, archives, museums and other cultural activities” (NACE 91) which also decreases at a faster rate than the average.

Figure 742. Trend in Employment in CCSs for sector of activity in Sweden

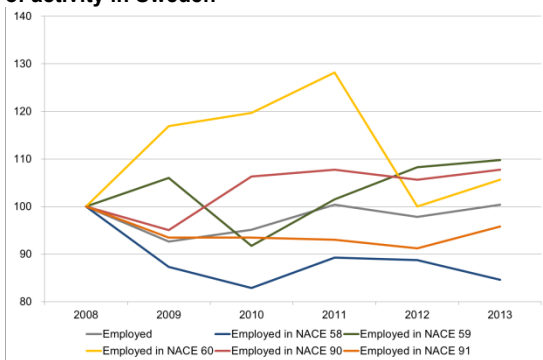
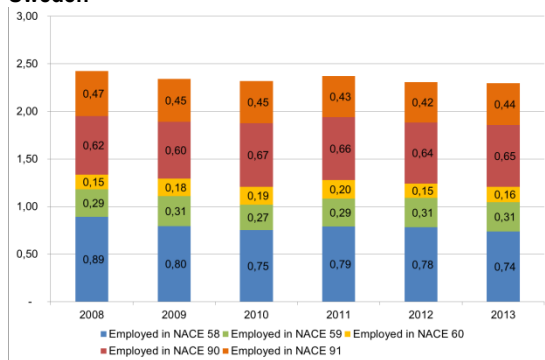


Figure 743. Composition of employed in CCSs in Sweden



Source: Eurostat

The statistical sample of young employees gives an unclear vision of the general trend among the young. The only sector that seems to have a negative trend is the “Publishing activities” sector (NACE 58), while the other show a fluctuating trend in the past 6 years due to lack of available data.

Figure 744. Trend in Employment in CCSs for sector of activity for young employed in Sweden

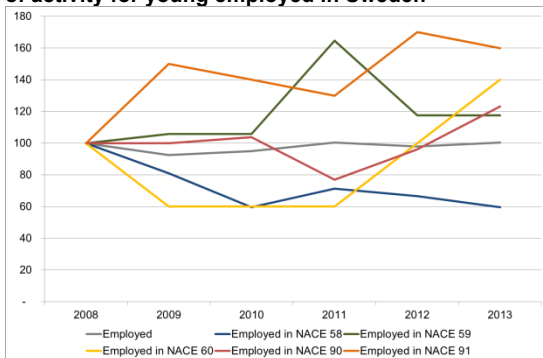
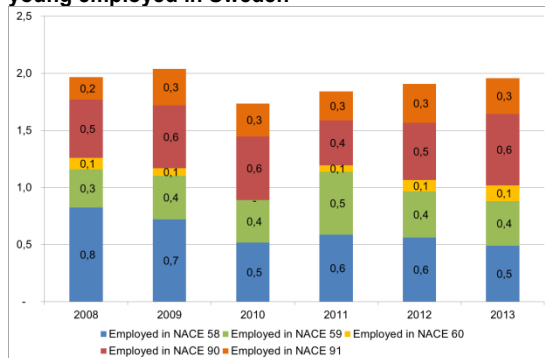


Figure 745. Composition of employed in CCSs for young employed in Sweden



Source: Eurostat

ICT

Around 95% of Swedish people use the Internet and 32% of inhabitants have access to broadband. The mobile subscriptions are increasing (124,4 every 100 inhabitants) whereas fixed telephone subscriptions are decreasing (from 64,6% in 2003 to 40,4% in 2013).

Figure 746. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in Sweden

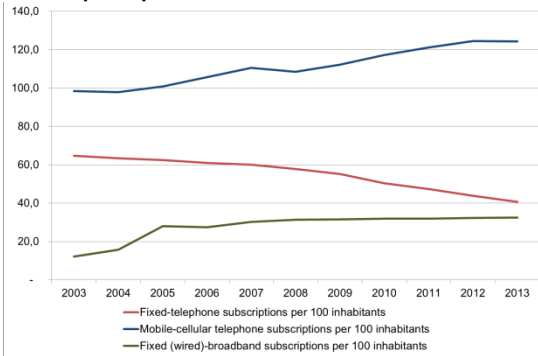
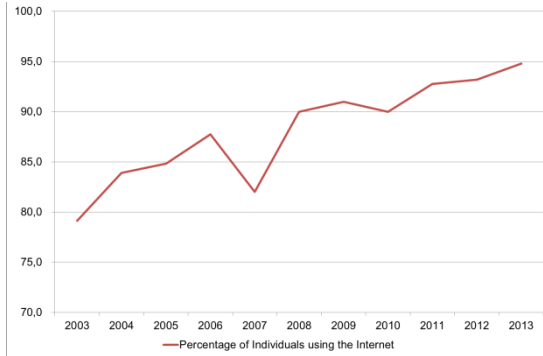


Figure 747. Percentage of Individuals using the Internet in Sweden



Source: Eurostat

The employment in ICT is growing faster than in other sectors: this is caused by the growth of employment in “Computer programming, consultancy and related activities” (NACE 62), which was at 2,2% in 2013 (it was at 1,9% in 2008). The employees in “Telecommunications” (NACE 61) and in “Information service activities” (NACE 63) are a minority but have remained stable in the last years.

Figure 748. Trend in ICT Employment in Sweden

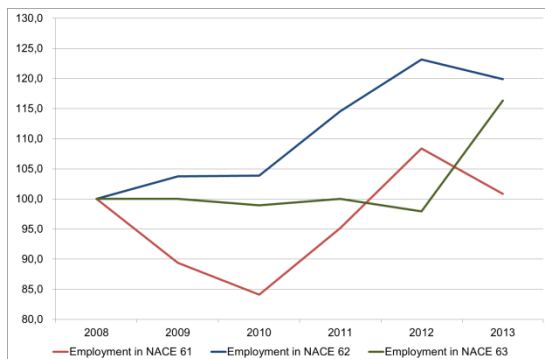
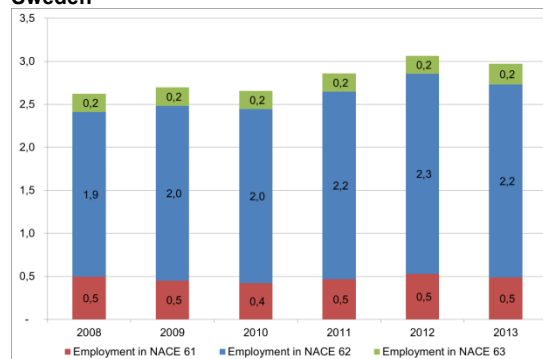


Figure 749. Composition of ICT Employment in Sweden



Source: Eurostat

UNITED KINGDOM

The United Kingdom has been member of European Union since 1973 but is neither in the Schengen Area nor in the Euro area.

The population in 2013 was 61,7 million and, in the last decade, this number is growing, as well as it is the labour force. The number of young people is growing more slowly than the total population and in the labour market they are significantly decreasing from 2008.

Figure 750. Trend in population in the United Kingdom

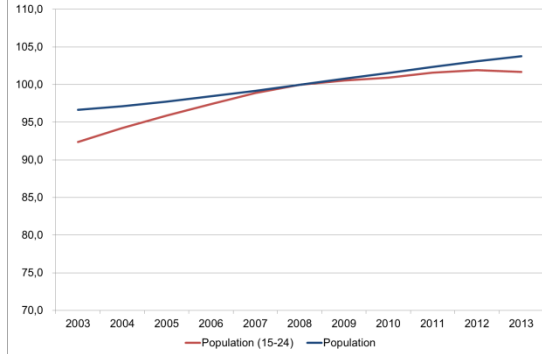
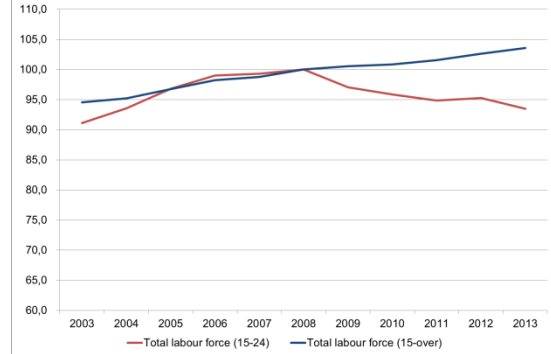


Figure 751. Trend in labour force in the United Kingdom



Source: Eurostat

The financial crisis has strongly affected the United Kingdom. From 2007 to 2009, there has been a negative trend in GDP and, in the following years, it came back to the same level of 2008. The negative effect on domestic product has influenced public expenditure, that has remained stable for the last 6 years.

Figure 752. Trend in GDP in the United Kingdom

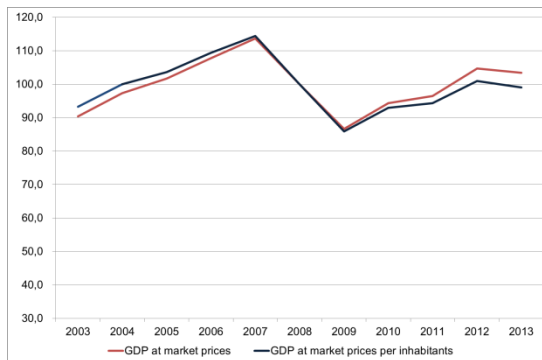
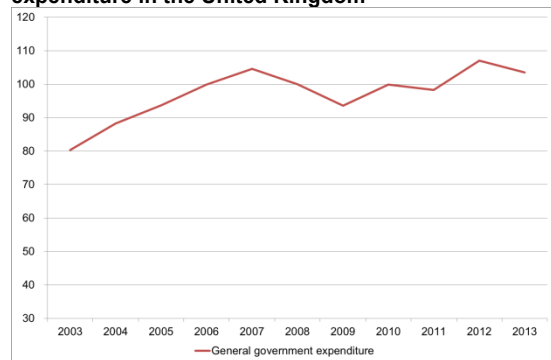


Figure 753. Trend in general government expenditure in the United Kingdom



Source: Eurostat

While the economy indicators are negative, the effect of the crisis seems not to affect employment, as along with self-employment, both have increased after 2008. A negative trend is only registered among young people.

Figure 754. Trend in employment in the United Kingdom

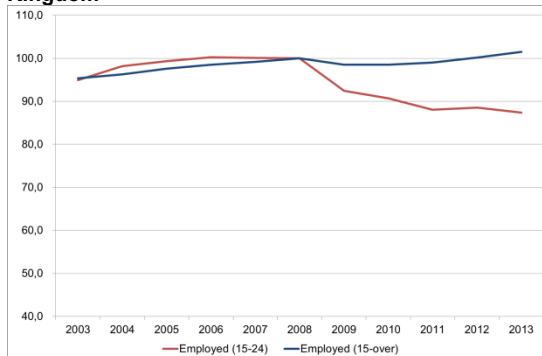
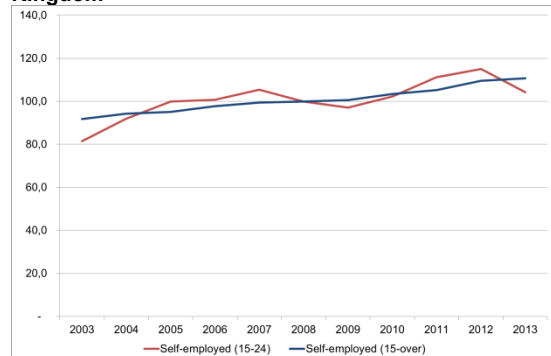


Figure 755. Trend in self-employment in the United Kingdom



Source: Eurostat

Social environment

The position of women in the labour market has improved over the last decade: the tendency in employment is positive and the percentage of women employed is 46,5% (among the young it is 49%).

Figure 756. Trend in Female employment in the United Kingdom

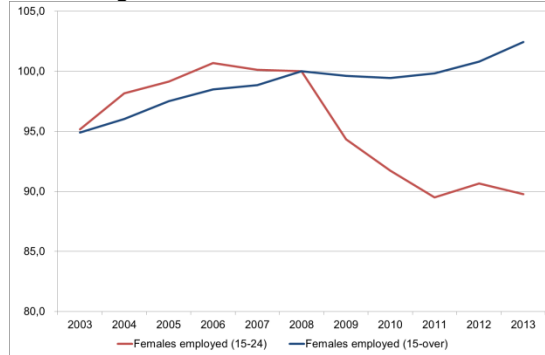
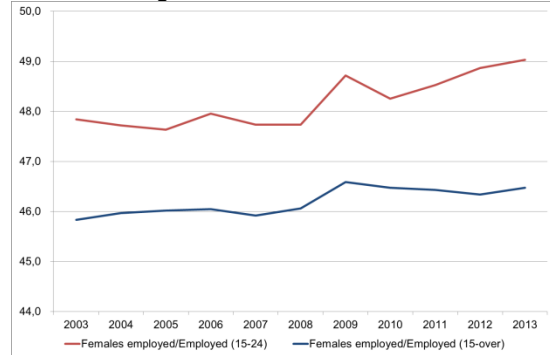


Figure 757. Female participation to labour market in the United Kingdom



Source: Eurostat

The number of new acquired citizenships has risen from 2008, while the crime has decreased in the last 6 years.

Figure 758. Acquisition of Citizenship in the United Kingdom

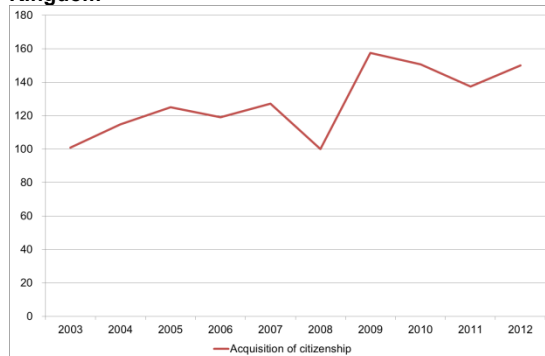
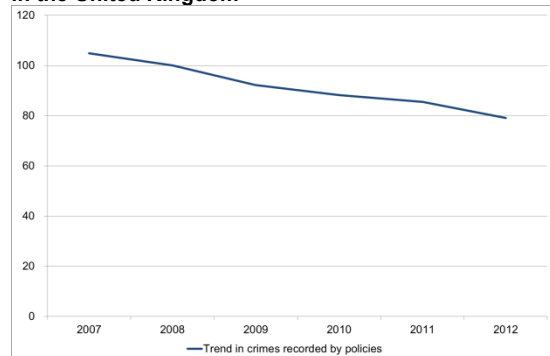


Figure 759. Trend in crimes recorded by the police in the United Kingdom



Source: Eurostat

The risk of poverty for the young has increased but social policies aiming to include them in the education system seem to be effective, as the number of early school leavers is going down remarkably.

Figure 760. Young people at risk of poverty or exclusion in the United Kingdom

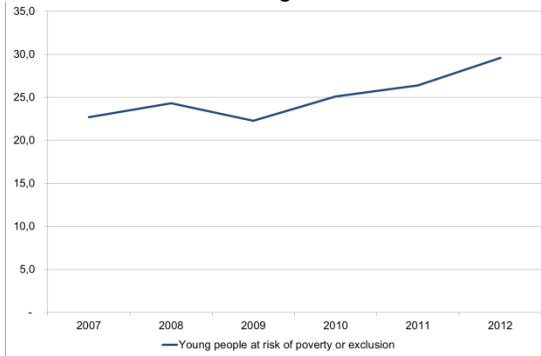
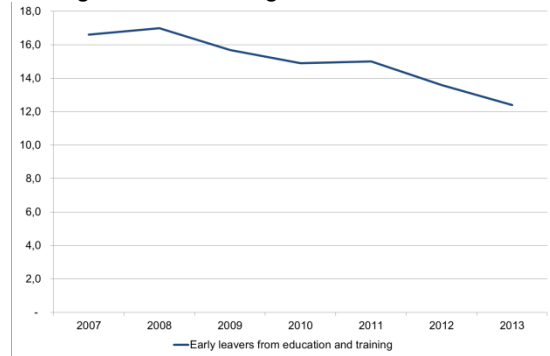


Figure 761. Early leavers from education and training in the United Kingdom



Source: Eurostat

There are no available data on voluntary activities in the United Kingdom, and in general terms there is not a strong family trust. The United Kingdom has the lower rate in Europe for this indicator and the trust in institutions is also low, with only a 8,2%.

Table 80. Other trust indicators in the United Kingdom

Description	Age	2006
Ability to ask any relative, friend or neighbour for help		43,9
Participation in activities of charitable organisations		8,2

Source: Eurostat

Culture and Creativity

The CCSs registered a negative trend in the last years: while the contribution to GDP has decreased, reaching 2,5% in 2011 from 2,95% in 2003, the GDP in the CCSs remains stable from 2010.

Figure 762. Trend of GDP in CCSs in the United Kingdom

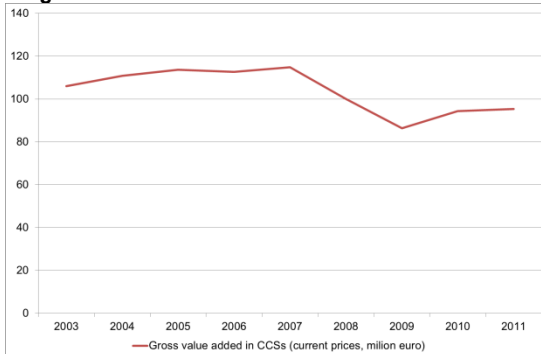
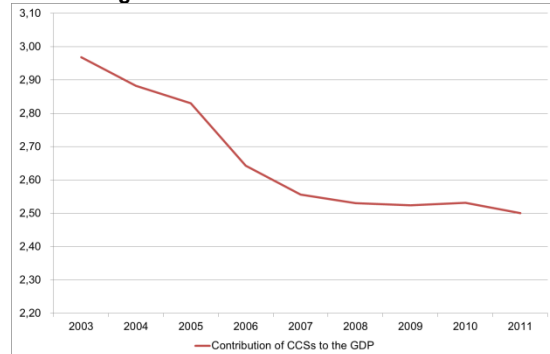


Figure 763. Contribution of CCSs to the GDP in the United Kingdom



Source: Eurostat

The negative trend is confirmed by the following data: public expenditure in culture from 2007 has fallen in comparison with the total budget.

Figure 764. Trend in public expenditure in Culture in the United Kingdom

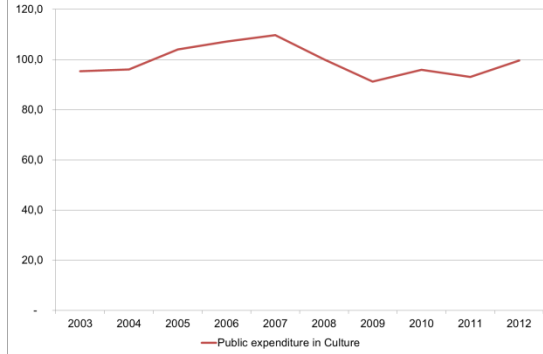
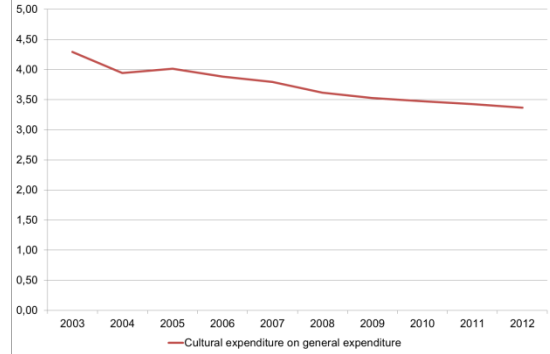


Figure 765. Public cultural expenditure on total public expenditure in the United Kingdom



Source: Eurostat

Demand and Supply of Culture and Creativity

In the United Kingdom there are 24 UNESCO cultural sites and 1732 museums: 2,4 per 100.000 inhabitants.

Table 81. Number of UNESCO cultural sites and museums in the United Kingdom

Description	Year	Number
UNESCO cultural sites	2013	24
Museums	2012	1732

Source: Eurostat, EGMUS

51,7% of the population attends live performances (18,6% more than 4 times per year); 52,2% goes to the cinema (25,7% more than 4 times) and 52,4% visits cultural sites (24,2% frequently).

Table 82. Cultural behaviours in the United Kingdom

Description/Times	none	1-3	4-6	7-12	more than 12
Times going to live performances	48,2	33,1	10,7	4,6	3,3
Times going to the cinema	47,7	26,5	13,3	6,9	5,5
Visits to cultural sites	47,6	28,2	12,2	6,3	5,7

Source: Eurostat

Education

Students in culture-related subjects are 21,7% of the total with rates growing. Those enrolled in the Arts grow faster than the general trend; students in the Humanities are decreasing whereas those in Architecture and building and in Journalism and information are increasing.

Figure 766. Trend in tertiary students in the United Kingdom

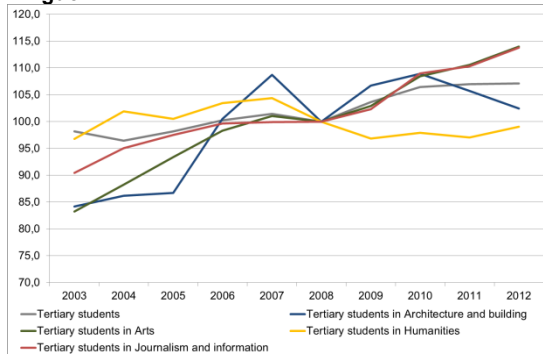
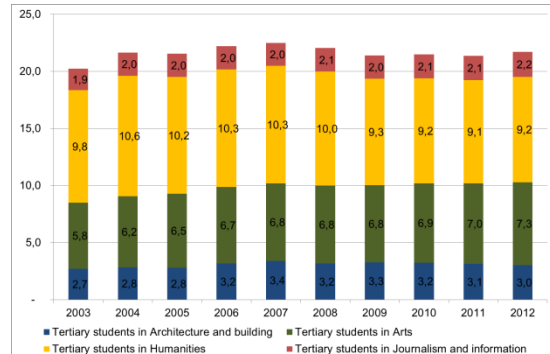


Figure 767. Tertiary students in the United Kingdom



Source: Eurostat

Employment and Young employment

The trend in employment in the CCSs is described by the following data: the percentage of employees in CCSs is 2,1% (2% among young). As shown by the charts, the evolution is positive for the young but negative for adults.

Figure 768. Employment and young employment in the United Kingdom (Total and in CCSs)

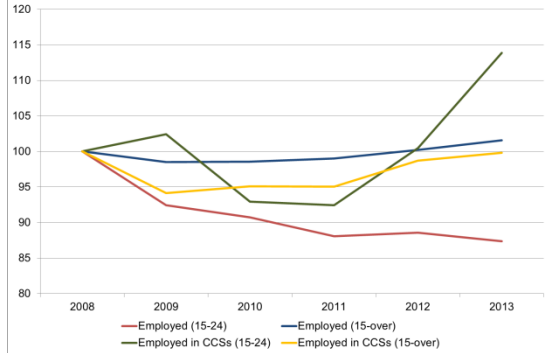
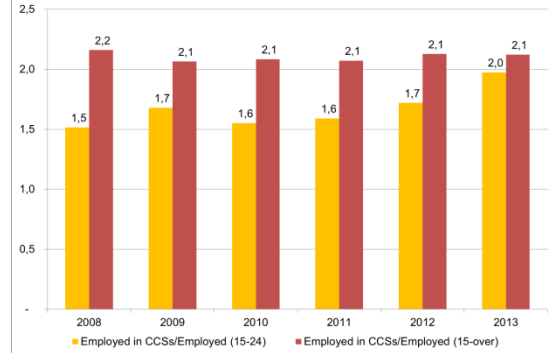


Figure 769. Composition of Employed in CCSs on total employed in the United Kingdom



Source: Eurostat

Looking at the sectorial data, the only sector that registers a positive trend is the “Programming and broadcasting activities” sector (NACE 60) (0,26% of total employment), while the other sectors decrease at a faster rate than the general trend. From 2011, the direction seems to be inverted especially for those employed in the “Creative, arts and entertainment activities” sector (NACE 90) and in the “Motion picture, video and television program production, sound recording and music publishing activities” sector (NACE 59). On the other hand, a negative trend is registered by the “Publishing activities” sector (NACE 58) and the “Libraries, archives, museums and other cultural activities” sector (NACE 91).

Figure 770. Trend in Employment in CCSs for sector of activity in the United Kingdom

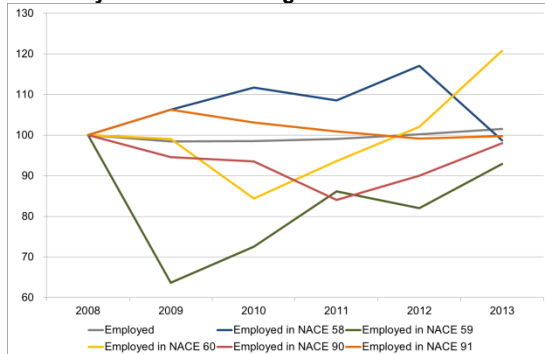
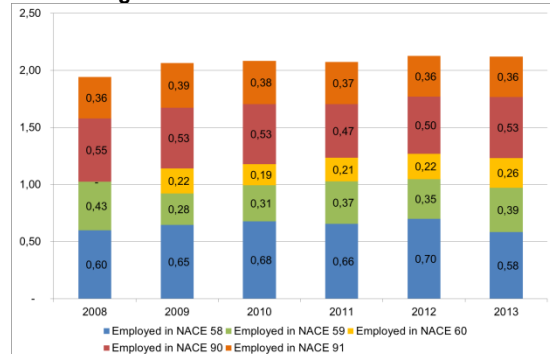


Figure 771. Composition of employed in CCSs in the United Kingdom



Source: Eurostat

*NACE 60 in 2008 is estimated

The charts below show the trend in employment per sector among the young population: the only sector which shows a decrease is the “Creative, arts and entertainment activities” sector (NACE 90), while the other sectors grow at a faster rate than the general trend.

Figure 772. Trend in Employment in CCSs for sector of activity for young employed in the United Kingdom

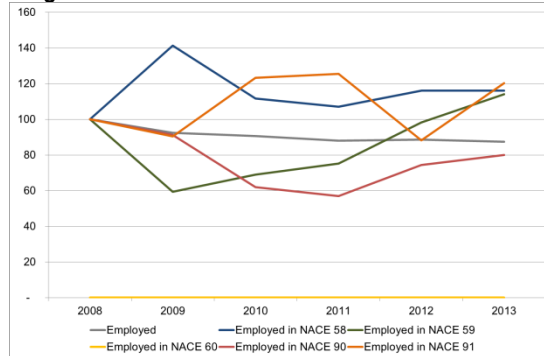
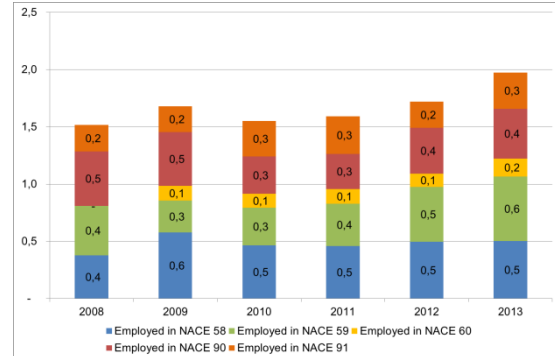


Figure 773. Composition of employed in CCSs for young employed in the United Kingdom



Source: Eurostat

ICT

In United Kingdom 90% of the inhabitants use the Internet (they were 65,6% in 2003); mobile subscriptions are 123,8 every 100 inhabitants and the broadband reaches almost 36% of the population. The fixed telephone subscriptions are decreasing: in 2013, only 52,9% of inhabitants had a fixed telephone contract.

Figure 774. Fixed telephone, Mobile and broadband subscription per 100 inhabitants in the United Kingdom

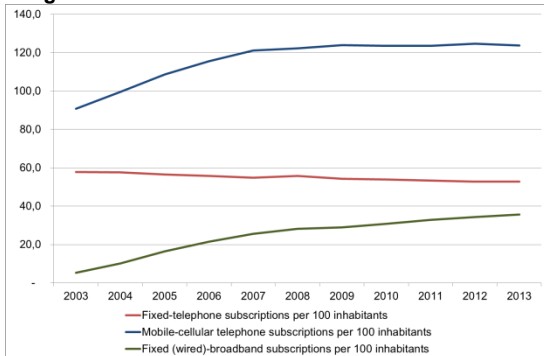
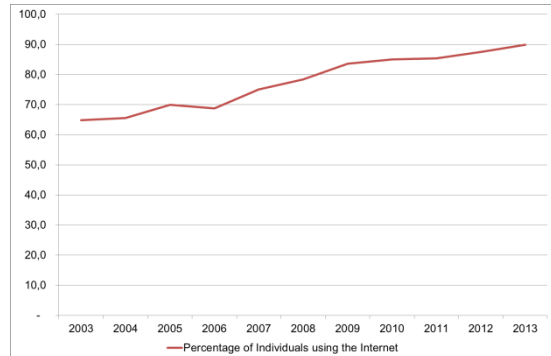


Figure 775. Percentage of Individuals using the Internet in the United Kingdom



Source: Eurostat

The ICT sector faced the impact of the crisis from 2008 to 2012. The following data show the trend in employment in the United Kingdom: only the “Computer programming, consultancy and related activities” sector (NACE 62) shows an improvement, with a 2% of the total population employed in 2013. Within the same period the other sectors are decreasing. In the last two years the “Telecommunications” sector (NACE 61) seems to be inverting the negative trend, but it represents only 0,6% of the total employed in the country.

Figure 776. Trend in ICT Employment in the United Kingdom

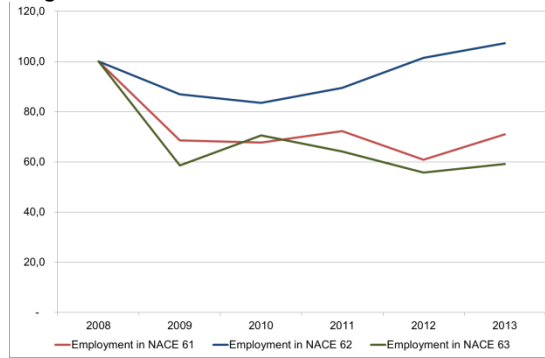
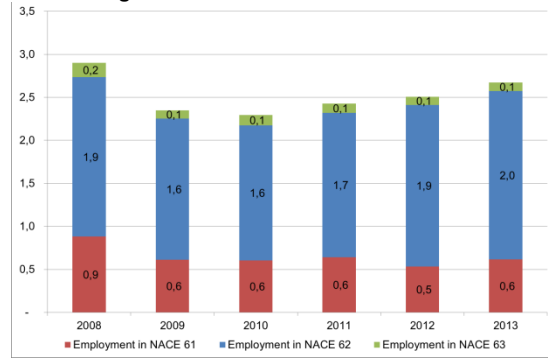


Figure 777. Composition of ICT Employment in the United Kingdom



Source: Eurostat

Opinions and interviews

To collect opinions among the OMC group a web interview was carried out. The interview is available at <http://www.eecom.it/limesurvey/index.php?sid=62975&lang=en> (Token: DGEAC)

Recipients: members of the OMC group on export strategies for the CCSs. Following the suggestions of DGEAC the interview has been sent to:

Michele Trimarchi, Emilio Cabasino, Michael Soendermann, Mike Coyne, Hassan Bakhshi, Cristina Da Milano.

The interview is divided in 3 parts, as follows:

- **Part one (Creative labour market)**
- The labour market in your country
- Flexibility of working contracts
- Training in cultural and creative sector
- Availability of cultural statistics
- **Part two (App economy)**
- Digital agenda in your country
- Priorities in digital policies
- Public and private investments in digital companies (R&D, etc.)
- **Part Three (Best and worst practice)**
- A list of best practice in cultural and creative sector
- A list of worst practice in cultural and creative sector
- A list of best practice in digital sector
- A list of worst practice in digital sector

Conclusion

This study has collected data from Eurostat in order to exploit comparable figures to understand the dynamics in the labour market and, in particular, in the Cultural and Creative sectors (CCSs) and the Information, Communication and Technology sectors (ICTs), in order to assess the resilience of employment in the CCSs.

The underlying assumption was, as stated in the introduction and first part of this report, that that employment in the CCSs is resilient and, in order to assess whether this assumption is correct, it was decided to analyse available data as regards the labour market and to complement it with further statistical information to provide for as comprehensive a scenario as possible.

Main issues which influenced this study:

- ***The “nature” of the cultural and creative sectors***

Culture and creativity are “labels” that encompass different realities depending on the country and the development of the CCSs and the ICTs can be the result of different national policies. Moreover, the statistical framework available is often shaped at national level while policies for the CCSs are mostly designed at local level. Whereas it can be quite difficult to demonstrate that at European and national level employment in the CCSs is resilient this can, on the contrary, be demonstrated quite easily at local level. The cultural and creative sector is often organized in clusters. An extensive analysis of the labour market at country level can only give a general trend which, moreover, might not be accurate since the cultural creative sector flourishes especially in smaller areas and has spill-over effects in many other areas (crime, health, etc.). Indeed, many case histories have been studied at small scale (neighbourhoods, small areas in a city, etc.) and many of the reports that try to underline the importance of the CCSs in the general economy of a country analyse, to this end, realities in towns or portions of cities.

- ***Change of lifestyle***

Another perspective that should be taken into account is the fact that in the last years our society is changing deeply its life-style. This is not the place where discuss this issue, but it is important to underline that this change in the behaviours of citizens has a strong impact on cultural and social aspects and has also a direct impact on the CCSs.

A change in cultural consumption, in production of new cultural products, in sharing the experiences of cultural and creative goods can have the effect of changing very strongly the CCSs. This kind of modification of our society can be evaluated in the long run and the data available for CCSs are now available only for a short term, spanning only a decade at the most.

- ***The Labour Force Survey (LFS)***

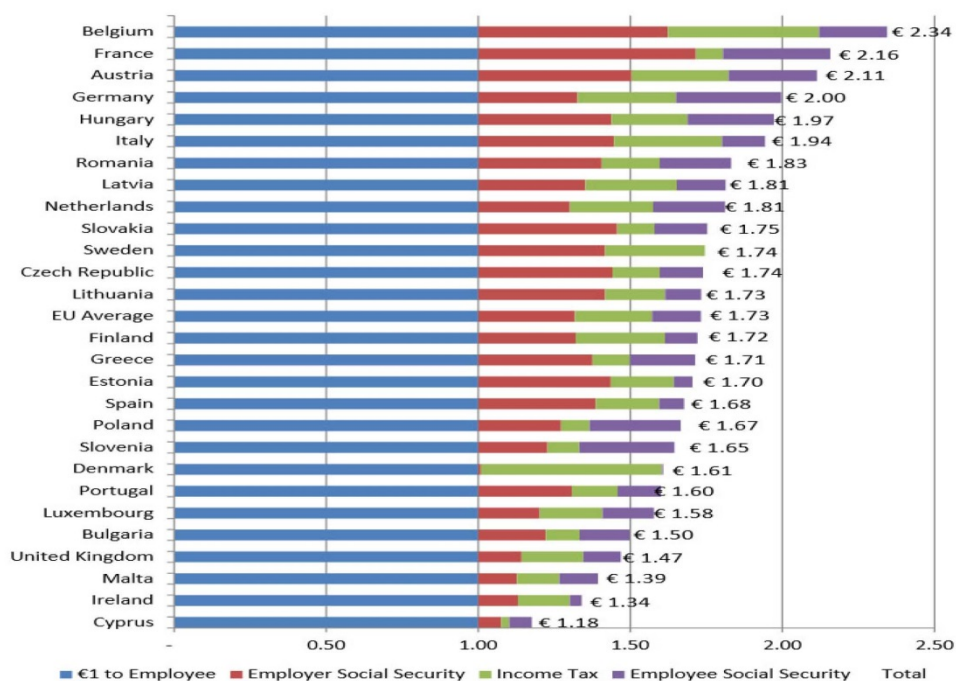
The labour force survey (LFS) can give a general trend at both national and international levels but suffers of the statistical limits proper of a survey. Another limit to the analysis carried out is that the sections of data available are small: the CCSs as the ICTs account for approximately only about 2% of the total population of a given country and, in the case of young people, the portion analysed often represents only a few thousands of units in a one given country. Indeed, there are only a very small number of cases on which to base initial considerations which in no way can be considered as final and comprehensive. In general terms, there is a strong risk of working with data which is incomplete and, in many countries, the small numbers available for the past years cannot provide for the identification of a

correct trend. Consequently, this study can be a first step in the analysis of the CCSs and ICTs in order to identify which are the most relevant areas in Europe on which to focus further research and structure different *ad-hoc* analyses. The present study provides an overview picture of the general situation of the labour market in the CCSs and this also in relation with the general environment (social, economic and cultural).

- **National labour markets and fiscal regulations**

Another factor that has to be taken into consideration is that Member States in the EU have different labour market and fiscal regulations. The following chart highlights the difference between gross and net salary in the different EU Member States. The total cost of work can indeed have a strong impact on the development of employment but, on the other hand, the level of public services for the labour market can be more or less effective in the different EU Member States.

Figure 778. Cost of 1 euro of net salary in the different European Countries



Source: Eurostat

The crisis has had a very strong effect in many Member States and this general trend implies that both in the CCSs and ICTs there have been different development paths that have depended upon many diverse factors.

Overall, the resilience of the labour market is the consequence of a range of public policies. In the present study the general environment and the specific context of the labour market in the different EU Member States has been described and this with the aim of having the highest number of factors that play a role in the development of the CCSs and the ICTs.

Conclusion

The diversity of the available data and the differing situations and the issues listed above do not allow to draw a single, general conclusion: in many Member States there is a strong tradition in the CCSs that can explain the reason why the sector is more resilient whereas in others it is only possible to say that policies in support of the cultural and creative sector are only at the beginning and that the effects will be visible in the future.

The following matrix presents a summary of the different aspects that can have a role in the development of the CCSs and ICTs and tries to characterize the different positions of the individual European Member States. It has been worked out on the basis of the rank orders of the indicators, taking the maximum level of each indicator and dividing it in 3 levels: the higher class is indicated with a “+” sign, the medium with a “=” sign and the lower with a “-” sign. The aggregated indicator (total) is calculated by adding the number of signs and weighing the different results with their relative importance: + equals 3 points; = equals 2 points and – equals 1 point while n/a equals 0 points.

	% of Employed in CCSs	% GDP in CCSs	% public expenditure in Culture	Voluntary activity	Cultural participation	Total	Young people	Adults
Austria	=	=	=	=	+	=	-	+
Belgium	=	=	-	-	+	-	+	+
Bulgaria	=	=	=	-	-	-	+	-
Croatia	=	n/a	n/a	n/a	n/a	-	-	+
Cyprus	=	=	=	+	=	=	-	+
Czech Republic	=	=	=	-	=	-	+	+
Denmark	+	+	=	-	+	+	-	-
Estonia	+	=	+	=	=	+	+	+
Finland	+	+	=	=	+	+	+	+
France	=	=	=	-	+	=	+	+
Germany	+	+	-	=	+	+	-	-
Greece	=	+	-	-	=	-	+	+
Hungary	=	+	=	-	=	+	+	-
Ireland	=	=	=	-	=	-	+	+
Italy	=	=	-	-	=	-	+	+
Latvia	+	n/a	+	=	=	=	+	=
Lithuania	=	=	=	-	=	-	X	+
Luxembourg	=	=	+	=	+	+	X	=
Malta	=	+	=	-	-	-	+	+
The Netherlands	+	=	=	+	+	+	-	-
Poland	=	=	=	+	=	=	+	-
Portugal	=	-	=	=	=	-	+	+
Romania	-	=	-	n/a	n/a	-	-	+
Slovakia	-	+	=	=	+	=	-	+
Slovenia	+	=	+	+	=	+	-	-
Spain	=	n/a	=	=	+	-	-	-
Sweden	+	=	=	=	+	+	-	-
United Kingdom	+	+	=	n/a	+	=	+	-

As the table above shows, in 16 countries there is a positive indicator as regards the resilience of adult employment in the CCSs labour market and in 15 countries there is a

positive indicator as regards the employment of young people⁵: consequently, **it is possible to affirm that, in the majority of the EU Member States, the labour market in the CCSs is indeed resilient.**

The table also clearly highlights that - focusing on the different results of the indicators - there is a very rich **variety of combinations**:

- There is a group of Member States in which a positive value for the total indicator is not followed by a positive indicator in the cultural and creative sector's labour market, and this for both young and adults. These Member States are Denmark, Germany, the Netherlands, Slovenia and Sweden.
- There is another group of Member States in which a negative value for the total indicator is connected to 2 positive indicators as regards the resilience in the labour market of the CCSs, both for adults and young. These Member States are the Czech Republic, Ireland, Italy, Malta and Portugal.
- In 10 Member States (Belgium, Czech Republic, Estonia, Finland, France, Greece, Ireland, Italy, Malta and Portugal) there is a positive result for the resilience in the labour market both for young and adults and in 6 Member States (Denmark, Germany, The Netherlands, Slovenia, Spain and Sweden) there is a negative result for both. It is important to underline that in these 6 Member States there is a high percentage of employed in CCSs and this might be the reason why employment in the sectors has not proven resilient.
- In 5 Member States (Austria, Croatia, Cyprus, Romania, Slovakia) there is a negative result for the young but a positive one for adults and in 4 Member States (Bulgaria, Hungary, Poland, United Kingdom) the inverse situation is present.
- As regards to other Member States, it has been impossible to achieve conclusive results: in Croatia or Romania the lack of data for many indicators cannot give a clear answer and in some other Member States there is no complete set of indicators available. This fact points on the importance of having quality data collected and harmonised in all the European Member States in order to enable for a correct analysis of the political, social and economic policies needed to develop a strategy to strengthen the CCSs and to multiply their impact in the economy.

On the basis of the analysis carried out so far and with the data available it is, nevertheless, possible to say that **the development of the CCSs follows different paths and that a positive or negative result at Member State level can be connected with other factors** like tradition, innovation, skills, technologies, etc.

The very wide range of Member States, the different situations registered in each in terms of development, public services, productive systems, etc. cannot give a clear cut answer to the initial question regarding the resilience of the labour market in the CCSs and cannot give evidence of the paths that need to be followed to reach the goal of a strong development of the CCSs.

Final considerations, remarks and guidelines

- As shown throughout the study, **the work force employed in the CCSs represents a very small part of the total work force: indeed, those employed in the CCSs represent approximately 2% of the total work force.** The Labour Force Survey (LFS) is carried out through a sample of the total work force and, although the resulting trends can be considered as general, when specific segments of data (be it per country or

⁵For Luxemburg and Lithuania it is, nevertheless, impossible to provide a definite answer.

sector) are analysed trends appear as less significant. Consequently, when alterations happen on small numbers and are applied to percentages, they appear to be more relevant than what they should.

- As most studies show, **women represent the highest percentage of those employed in the cultural sector, in general, but also in the CCSs.** When the “resilience” factor appears in employment the obvious question is whether it is the sector, be it the cultural sector of the CCSs, which is resilient or whether it is rather women that, in more general terms, are more resilient.
- **Most of those employed in the CCSs are either employed in small companies (SMEs) or self-employed.** When analysing self-employment it appears that it covers a very wide diversity of professions, ranging from culture and the arts to amusement activities, betting and gambling or sport. Therefore, available data does not allow for a correct identification of trends as regards in self-employment in the CCSs.
- The different European countries show diverse situations which make it difficult to compare larger countries such as Germany, France or Italy with smaller ones such as Estonia, Luxemburg, Malta, etc. Moreover, in some cases the overall population of a one given country is lower than that of regions or cities in another: for example, the total population of Croatia is equivalent to 50% of the population of London. Thus, **analysis should be eventually carried out at different territorial levels**, depending on the situation. In fact, in some cases the analysis of the CCSs appears to be better focused if carried out within smaller territories rather than at country level especially in the cases of larger countries where it is difficult to identify micro data and, consequently, identify development trends.
- **Public policies geared to foster culture and creativity appear to have a stronger impact at infra-state level**, in more limited territories (as is the case of the creative clusters). Although this study provides for a macro analysis it, nevertheless, enables for the identification of the criteria to determine what are the most relevant environments where culture and creativity can flourish.
- As stated on several occasions in the study, **culture and creativity flourish in territorial “clusters” albeit in specific countries.** Conversely, these clusters have direct or indirect spill-over effects on other sectors, industrial or not, and also beyond the specific territory where they are located. This shows that although this study has applied the “from general to particular” approach, the reverse approach might prove to provide interesting results.
- In a period when public and private budgets decrease, it is important that **public policies aim at fostering both cultural participation and consumption of cultural goods and services** in order to boost the development of the cultural and creative sectors through direct market revenue.
- Finally, **regulating the labour markets** could have a strong impact on the development of the cultural and creative sectors.

Therefore there is further scope to:

- Identify creative clusters where to carry out specific research in order to provide policy makers with a more detailed dimension of the phenomenon. In this sense, it might be interesting to focus research on medium-sized cities (or on specific areas of larger-sized cities).
- Include social indicators in the analysis of the cultural and creative sectors since they provide for a good approximation to the creative environment.

- Collect, in the coming years, a data set to track the development of the cultural and creative sectors and emphasize the different development trends at different territorial levels.
- Make available both quality open-data in the cultural and creative sectors as well as the existing research on the impact of cultural and creative policies since this provides very useful tools for all those professionals wanting to operate in the sector.
- Stimulate transparency as regards public funding, both at national and local levels, for the cultural and creative sectors not only as concerns its end-results but, rather, as regards the overall process leading to policies definition and the granting of funds. This enables for a sense of ownership built on trust from the cultural professionals as well as from civil society at large. Ultimately, it fosters the development of the sector itself.
- As a result of the data gathering process and of the cluster analysis, it would be possible to better define the parameters and categories that identify both cultural and creative professionals as well as the cultural and creative sectors.
- Carry out a deeper analysis should be carried out on the so-called “**Secondary resilience**”, i.e. the relations between the CCSs and the other economic sectors and the impact of cultural policies in the economic environment.

Bibliography and sources of information

The analysis is started with a mapping of the literature in the field of creative economy and statistics. From the suggestions of the DG EAC, the preliminary study started from the analysis of the literature in the field of Creativity and statistics. We have extended the number of studies to documents and analyses. The bibliography listed below contains the literature suggested by DGEAC and other texts we added:

- ✓ Creative industries for youth: unleashing potential and growth (UNIDO 2013);
- ✓ Cultural statistics pocket book (Eurostat 2011);
- ✓ ESSnet Culture – European Statistical System Network on Culture’s Final Report 2012
- ✓ The Economy of Culture in Europe (KEA 2006)
- ✓ Working Paper 40: London's creative workforce (Greater London Authority 2010)
- ✓ Communication from the European Commission on Promoting cultural and creative sectors for growth and jobs in the EU (EC 2012)
- ✓ Cultural statistics in the spotlight (Eurostat 2011)
- ✓ Special Eurobarometer 399 – Cultural Access and Participation Report 2013
- ✓ Hallegatte, Stephane, (2014), *Economic resilience: definition and measurement. Policy Research working paper*, no. WPS 6852, Washington, DC: World Bank Group
- ✓ La diversité des emplois créatifs: une richesse pour l'Île-de-France (IAU 2011)
- ✓ La spesa pubblica in Europa 2000-2013 (Ministero dell'Economia e delle Finanze – Ragioneria generale dello Stato, 2014)
- ✓ Promoting Investment in the Cultural and Creative Sector (KEA 2010)
- ✓ The Good practice report of the Open Method of Coordination Working Group on Cultural and Creative Sectors’ Export and Internationalization Support Strategies (2014)
- ✓ Un avenir plein de promesses dans le secteur des TIC pour une nouvelle génération de femmes (ITU 2012);
- ✓ Indicators of social capital in the European Union, Working Paper IAREG 2008/02
- ✓ Measuring the Information Society (ITU – International Telecommunication Union, 2013)
- ✓ Compendium on Cultural Policies and Trends in Europe” website
- ✓ DG EAC's website
- ✓ OMC members interviews
- ✓ “Review Essay on Labour Market Resilience” Working paper series 2013 no. 1 ISSN 22151605 http://www.inspires-research.eu/userfiles/D1_1%20Review%20Essay%20on%20Labour%20Market%20Resilience%281%29.pdf

Data collection

Data are mainly collected from official sources. The following list of sources summarizes the data used.

- RGS "La spesa pubblica in Europa: anni 2000-2012"
- Eurostat
- UNESCO
- EGMUS
- EU-SILC - ad hoc module 2006
- ITU - International Telecommunication Union