EUROPEAN CAPITAL OF CULTURE

THEME 2
GOVERNANCE & FINANCE

EVALUATION & MONITORING
Research Findings 2015

CONTENTS

INTRODUCTORY NOTE

The Valletta 2018 Evaluation & Monitoring process is a means through which the Valletta 2018 Foundation gains a deeper insight into the various impacts of the European Capital of Culture (ECoC) title on different spheres of cultural, social and economic life. The goal of this process is twofold (i) To understand the changes brought about by the ECoC title, and (ii) To address any shortcomings and challenges faced by the Valletta 2018 Cultural Programme throughout its implementation.

This process comprises a series of longitudinal studies commencing in January 2015, three full years before the European Capital of Culture year, and running through the ECoC, with results preented in 2019, thereby capturing data before, during, and in the immediate aftermath of Valletta holding the ECoC title.

This process is divided into five themes:

1. **Cultural & Territorial Vibrancy**
2. **Governance & Finance**
3. **Community Inclusion & Space**
4. **The Tourist Experience**
5. **The Valletta Brand**

This research is a collaborative, mixed-methods process, involving a number of public entities, collecting and analysing data primarily of a quantitative nature, together with independent researchers working with data that is predominantly qualitative. These entities and researchers constitute the Valletta 2018 Evaluation & Monitoring Steering Committee, that was set up to manage and implement this research process.

The public entities forming part of the Steering Committee are:

- National Statistics Office
- Malta Tourism Authority
- Employment & Training Corporation
- Economic Policy Department within the Ministry of Finance

The independent researchers participating within this process were selected according to their area of expertise. The areas covered are:

- Cultural Programme
- Branding
- Sociology
- Built Environment
- European Identity

Although each of these researchers, and their respective teams, are carrying out data collection and analysis specifically within their respective fields, various points of intersection and collaboration across the various areas have been established so far. The data being collected throughout each study is being shared with the Steering Committee in order to create synergies between the different fields being analysed.

The research methods adopted throughout the various studies that comprise this process vary greatly, ranging from quantitative surveys to in-depth interviews, focus groups and real-time experience tracking.

GOVERNANCE & FINANCE
THEME 2

Issues related to governance and economic impacts of culture represent a central consideration in the development of the cultural sector, shaping policy decisions and ensuring the sustainable growth of the sector. The research carried out under this theme attempts to address these issues by identifying the broader impact of cultural activity through an analysis of its return on financial investment, and by understanding changes in employment and educational opportunities within the creative industries.

The first of the studies within this theme is carried out by the Economic Policy Department (EPD) within the Ministry for Finance. This consists of a quantitative analysis of the cultural and creative industries in Malta, investigating the economic impact of various cultural activities and identifying the obstacles that hamper further growth within the sector. This study places particular emphasis on the design sector and the relationship between creative design and manufacturing.

Supplementing this analysis is the research carried out by the Employment and Training Corporation (ETC), which looks into changes in employment statistics within the cultural and creative industries, identifying relevant trends and employment patterns in the private and public sectors alike. This study intends to provide a detailed understanding of how employment opportunities are changing in the light of the significant developments taking place within the cultural sector, foremost amongst them the European Capital of Culture.

THE ECONOMICS OF THE CULTURAL & CREATIVE INDUSTRIES

ECONOMIC POLICY DEPARTMENT,
MINISTRY OF FINANCE

INTRODUCTION

The main objective of the Annual Report on Cultural & Creative Industries (CCIs) is to assess, on a continuous basis, the current situation of these industries in Malta. By means of empirical data, EPD sought to continue the research in order to grasp a better picture of such industries' contribution to the local economy in terms of both Gross Domestic Product (GDP) & Gross Value Added (GVA) as well as employment created.

CCIs have already been identified as one of the growth potential industries within the Maltese economy. To this end, the study could serve as a reference point/recommendation for policy makers to take better-informed decisions, based upon economic justifications.

This year the sector-specific analysis focused on the area of design, and the approach to such research was multifaceted. Firstly, recourse was made to the Community Innovation Survey (CIS) where the main aim was to illustrate the current situation in Malta in relation to the level of design and type of innovation activity being undertaken and compare it with other EU Member States.

To further enrich the study, EPD also conducted an input-output analysis of the design sector in Malta to evaluate the inter-industry linkages and multiplier effects[1] of the sector, through the evaluation of multiplier effects on the sector. The latter were compared with those of other industries in Malta. Thus, through the use of input-output modelling an estimation of the direct, indirect and induced impacts of the design sector to the Maltese economy was carried out. The following types of multipliers were included in the analysis: Output, Value Added, Income and Employment Multipliers. The multipliers have shown that the design sector is positioned quite strongly in relation to the rest of the sectors in the Maltese economy.

Additionally, EPD performed a similar detailed input-output analysis of all CCIs in the Maltese economy as follows:

- Creative, arts and entrainment activities, libraries, archives, museums and other cultural activities, gambling and betting activities[2]*;
- Publishing activities;
- Motion picture, video and television programme production, sound recording and music publishing activities, programming and broadcasting activities;
- Computer programming, consultancy and related activities; information service activities;
- Architectural and engineering activities (the sector representative of design in Malta);
- Scientific research and development;
- Advertising and market research;
- Other professional, scientific and technical activities;

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[1] Multipliers show the effect on economic variables of a change in expenditure after taking into account both the direct effect on the industry concerned and also the indirect effects on other industries in the rest of the economy. These are typically referred to as Type I multipliers. Type II multipliers include induced effects resulting from the spending of labour income generated as a result of the initial shock in expenditure. By way of example a value added multiplier of 0.7 for design means that for every €1 increase in expenditure on design increases the total value added (directly and indirectly) in the economy by 70c.

[2] Unfortunately it is not possible to separate the gambling and betting sector from the creative sector and consequently this significant limitation has to be kept in mind.

EPD has also been meeting regularly with the Ministry for Justice, Culture and Local Government (MJCL) in view of its involvement in the Cost-Benefit Analysis (CBA) study related to the Valletta Design Cluster. Moreover, EPD has identified design in the Maltese Economy as a Target of Enquiry (TOE), a line for extending study beyond CCIs and Valletta 2018. In view of this, EPD has agreed with the National Statistics Office (NSO) for a questionnaire-based survey to be run, entirely focusing on design across the Maltese Economy. The latter will be linked to the Structural Business Survey (SBS) and, together, the two will constitute empirical qualitative and quantitative cross-sector research. The design questionnaire is currently at an advanced draft stage. A specific question was included in the SBS in order to establish a sample of companies active in design.

ANALYSIS

Design Activity in Malta: A Macro-Economic Analysis

Special emphasis was devoted to the Design sub-sector throughout 2015, in view of the Valletta Design Cluster, which is one of the Valletta 2018 Foundation's infrastructural projects. This analysis will be included as a new case study in the update to the report on The Economics of the Cultural and Creative Industries in Malta (EPD, 2014 Update). This paper on design activity in Malta will evaluate the economics of design, carrying out a comparison of design activity in Malta with that undertaken in a selected number of European economies based on the Community Innovation Survey. The paper will also contain an input-output analysis of the design sector in Malta identifying the interlinkages with the rest of the economy and the multiplier effects involved. This study will continue over the coming years.

Initial findings show that 'in design size matters'; fixed costs may hamper smaller firms in engaging in design activity in Malta. As companies grow, variable costs make design activity more profitable as the more competitive variable costs become more relevant. However at some point larger Maltese enterprises encounter a different kind of constraint; foreign ownership of larger firms may hinder the technology transfer which may be required in design activity.

The input-output analysis shows a moderate output multiplier but a relatively strong value added multiplier suggesting that leakages are weaker than other economic sectors within the economy. Furthermore, the multiplier analysis indicates both moderate income and employment multipliers within the Maltese economy.

The input-output analysis also suggests that services such as financial, auditing, IT, and consultancy constitute major inputs in the design process which services should be incorporated as appropriate in the concept of design cluster.

At the same time, a cluster should provide easy access to the main users of design, namely construction and real estate. However, of notable absence is the link between manufacturing and design activity, the absence of which is deemed detrimental to both the design sector and manufacturing itself.

The Economics of Cultural and the Creative Industries in Malta

CCIs are one of the more dynamic industries in Malta and their contribution has been growing in recent years. The aim of this section is to update the report on The Economics of Cultural and Creative Industries in Malta (EPD, 2014 Update) by making use of more up to date statistical information and hence be able to monitor the progress of the creative industries in Malta. Unfortunately, the collection of most of the disaggregated statistical data required to update the report has been discontinued by NSO.

At the same time, through research being undertaken by Dr. Ian Cassar from the Department of Economics at the University of Malta in collaboration with NSO and the Central Bank of Malta, the availability of more updated input-output tables for Malta present an opportunity to evaluate the interlinkages between CCIs in Malta and the rest of the economy.

This analysis will identify the main inputs required by CCIs, the major industrial consumers of the CCIs outputs, and the leakages involved in economic activity. Furthermore, this analysis will evaluate the multiplier effects in terms of output, value added, income and employment of selected components of CCIs. The evaluation will further distinguish between direct, indirect and induced effects in the context of input-output modelling. This study is currently at a mature draft stage and will continue over the coming years. Due to statistical constraints the analysis excludes the Arts and Heritage Sector.

The selected CCIs display relatively strong output linkages with the rest of the economy and consequently relatively strong Type I multipliers. They are generally ranked among the top 20 industries (out of 59 industries). In particular this applies to the audiovisual sector but also to the design, software services and creative services. On the other hand inter-industry linkages and hence output multipliers are relatively weaker for the printing sub-sector.

When excluding leakages, primarily the purchase of imported inputs in the production process, only Design activities, followed by the audiovisual sub-sector continue to display strong Type I value added multipliers. The other CCIs (namely creative services, software services, printing and publishing which rank between 32 and 42 out of 59 industries) display moderate to low Type I multiplier effects. When compared to the stronger output multiplier, the deterioration of the relative strength of the value added multipliers of the other CCIs reflect a relatively high import content involved in direct and/or indirect production.

The selected CCIs are also characterised by a relatively low labour intensity of production. Employment multipliers generally rank on the low end of the distribution of industries in Malta, particularly in software services, printing and publishing (rank between 42 and 49 out of 59). Design activities and creative services (rank 33 to 35 out of 59) display moderate labour intensity of production. Specialised design activities however display a stronger element of labour intensity. Only the audiovisual sub-sector displays a relatively high employment multiplier indicating that the sector is relatively labour intensive.

It is however interesting to note that the ranking of the income multiplier of those industries considered as capital intensive generally improves. This applies for the creative services, software services, printing and publishing suggesting that these sectors attract relatively high wages possibly reflecting the need of specialised and qualified personnel. In the design sub-sector the income multiplier ranks 27 (out of 59) suggesting a moderate income multiplier. It is also interesting to note that despite the strong labour intensity involved in audiovisual production, the income multiplier ranks relatively low (38 out of 59) suggesting that wages per capita in this sector are also relatively low.

A strategy to strengthen the economic contribution of the CCIs need not just look at the growth of the industry but also at the possibility of improving (backward and forward) linkages with the rest of the economy and the provision of domestically produced competitive inputs. This is the essence of the idea behind the creation of a cluster of activities.

The input-output analysis also suggest that services such as financial, legal and auditing, information technologies and consultancy constitute major inputs in the production process of most CCIs. Moreover, the CCIs supply their products mainly to the creative, arts and entertainment sector, and the wholesale and retail sector. Almost half of the CCIs are important providers of intermediate products for firms, companies and individuals engaged within that specific creative economy sector. Furthermore, substantial interlinkages exist amongst the various CCIs within the Maltese economy. Unfortunately the link with manufacturing industry is largely absent.

CONCLUSION

The absence of new SBS data at NACE 4-digit level, as mentioned previously, hindered the ability to update the CCI report as desired[3]. Instead, EPD focused on updating the report on CCIs by studying the input/output linkages and multipliers in CCIs and by adopting the design sector as a case study in its report update. In order to mitigate this issue, EPD is also considering making use of secondary data sources, which would allow for an interim update of the CCI report in 2016.

EPD is working closely with Arts Council Malta (ACM) and NSO in relation to future data gathering and data-sets that would allow enhanced understanding of spend and economic gain specifically in CCIs in Malta. ACM have, through their normal course of activity, collected valuable information on artists and artistic activity in Malta. Data sources currently being considered include administrative data and registers, survey data and national accounts data. Such data is vital to the monitoring of CCIs in Malta and the impact of policies in this area.

The realisation is there, within ACM, NSO and EPD that a concerted data collection activity in this area may well start with an understanding of what is available, amassed during normal activity and then extended as a formal survey among artists.

No firm decisions have been taken on any artist/artistic activity survey addressed to artists, but it would appear that such systematic data collection would enable more informed CCI work. EPD would make itself available to provide input in any such initiative and related questionnaire design, jointly with ACM and NSO.

Furthermore, EPD will be undertaking further training in Cost-Benefit Analysis work in order to carry out a substantial economic project analyses at a micro level for future deliverables in relation to its work with the Valletta 2018 Foundation.

Refinement and data analysis on the studies discussed throughout this report will continue throughout the upcoming years.

[3] Following discussions with NSO, it has been agreed that detailed 4-digit NACE data will be available as from the next SBS.

CREATING A CAREER IN CULTURAL AND CREATIVE INDUSTRIES

Adonia Sammut (on behalf of ETC)

INTRODUCTION

The main objective of this research is to analyse the impact of the investment and management in Valletta 2018 on employment within Malta's Cultural and Creative Industries. Such analysis will be based on statistical indicators in an effort to derive any changes in the employment structure in CCIs pre- and during Valletta 2018 [2014 – 2018].

METHODOLOGY

The methodology that has been adopted during this research is primarily based on quantitative techniques. A statistical analysis of a number of employment indicators has been carried out. Such indicators include:

- Full-time employment in CCIs
- Part-time employment in CCIs
- Total employment in CCIs
- Notified vacancies to ETC (relating to CCIs)
- Registered jobseekers (searching for jobs relating to CCIs).

Employment statistics have also been segregated by gender in an effort to capture any changes in employment structure pre- and during Valletta 2018. For the purpose of this research, the pre-Valletta 2018 period will cover from 2014 to 2016 whilst the Valletta 2018 period will incorporate data from 2017 to 2018. Due to the number of events, (both on a large and small scale) involved in the years leading up to the Valletta 2018, a priori it is expected that employment in CCIs should experience gradual increases over the time period under observation.

All data relating to employment, vacancies and registered jobseekers has been extracted from the ETC database. It is being intended that all statistical figures are first analysed on a quarterly basis; subsequently an analysis on an annual basis should be conducted when the necessary observations become available. Since the research is aimed at analysing the impact on employment pre- and post Valletta 2018, the statistical analysis will run from 2014 up to 2018. In order to determine the NACE[4] codes which should be classified under the Cultural and Creative Industries, feedback was gathered from other public entities such as the National Statistics Office (NSO) and the Ministry for Finance (MFIN). Furthermore, reference was made to a number of reports which included guidelines on the NACEs and ISCO[5] codes which should be included under CCIs. A full list of NACE codes included under CCIs for the purpose of this research in included in Appendix A.

[4] NACE or Nomenclature statistique des activités économiques dans la Communauté européennes is the statistical classification of Economic Activities in the EU.
[5] The International Standard Classification of Occupations (ISCO) is one of the main international classifications for which the International Labour Organisation is responsible. ISCO is a tool for organizing jobs into a clearly defined set of groups according to the tasks and duties undertaken in the job (ILO web portal).

Furthermore, ETC has been carrying out the development of an Employability Index. During 2015, an Employability Index Report was launched aimed at facilitating the transition from further and higher education to employment. The results relating to CCIs will also be extracted from this report so as to determine whether pre-Valletta 2018 period students furthering their education in the Creative Sector manage to find a job which requires the individual's level of education and one that matches the relevant area of study. The Employability Index Report launched in 2015 covered students who graduated in 2012 and 2013 from 3 main educational institutions; the University of Malta, the Malta College of Arts, Science and Technology and the Institute of Tourism Studies. Their individual areas of study where compared with their respective employment in the subsequent years 2012, 2013 and 2014 following their graduation year. Hopefully the Index Report will be updated in the near future in order to allow an inter-temporal comparison of results tied to CCIs. Such results could be further examined to determine whether Valletta being the European Capital of Culture has any impact on the type of jobs students pursuing studies in the Creative Sector find after completing higher education.

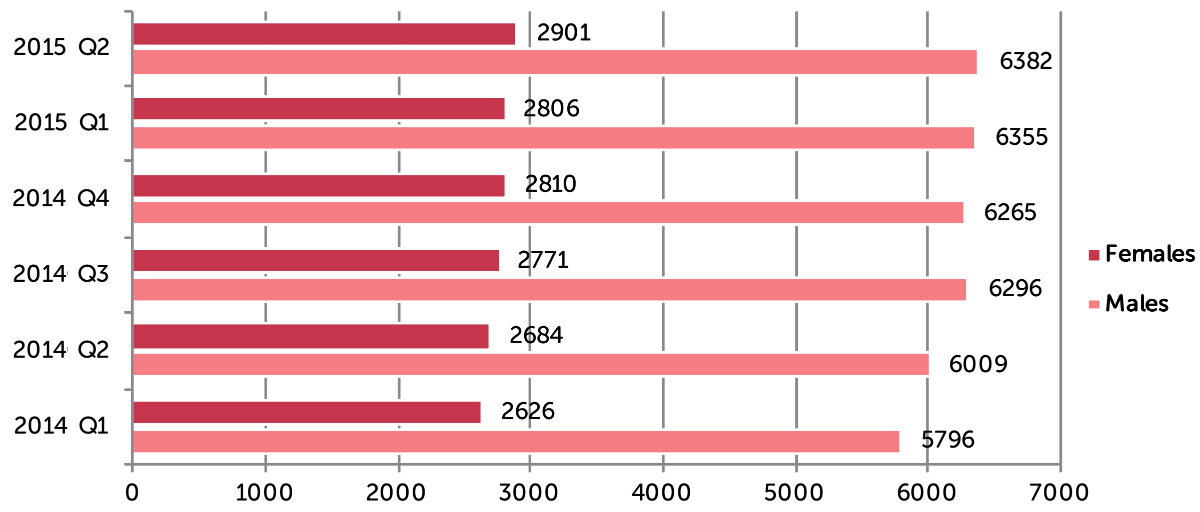
FINDINGS

The main results of the research conducted during 2015 is displayed and described in detail below.

- Full-time Employment in CCIs

As can be viewed in Figure 1 below, total full-time employment in the Cultural and Creative Industries has increased from 8,422 in Quarter 1 of 2014 to 9,283 in Quarter 2 of 2015, equivalent to a 10.2% increase. This increase is equally reflected in both gender cohorts such that an additional 586 males and 275 females were engaged in gainful employment within the creative sector. Although the number of males employed in CCIs decreased slightly at the end of 2014, it gained pace once again during 2015. Similarly female employment in CCIs decreased marginally by 0.1% during the first quarter of 2015 however this fall did not overturn the positive changes that were experienced during the previous quarters under review. The majority of full-time employment in CCIs as at 2015 Q2 was in the private sector (93%) whilst the remaining 7% were employed in the public sector.

Figure 1: Full-time employment in CCIs



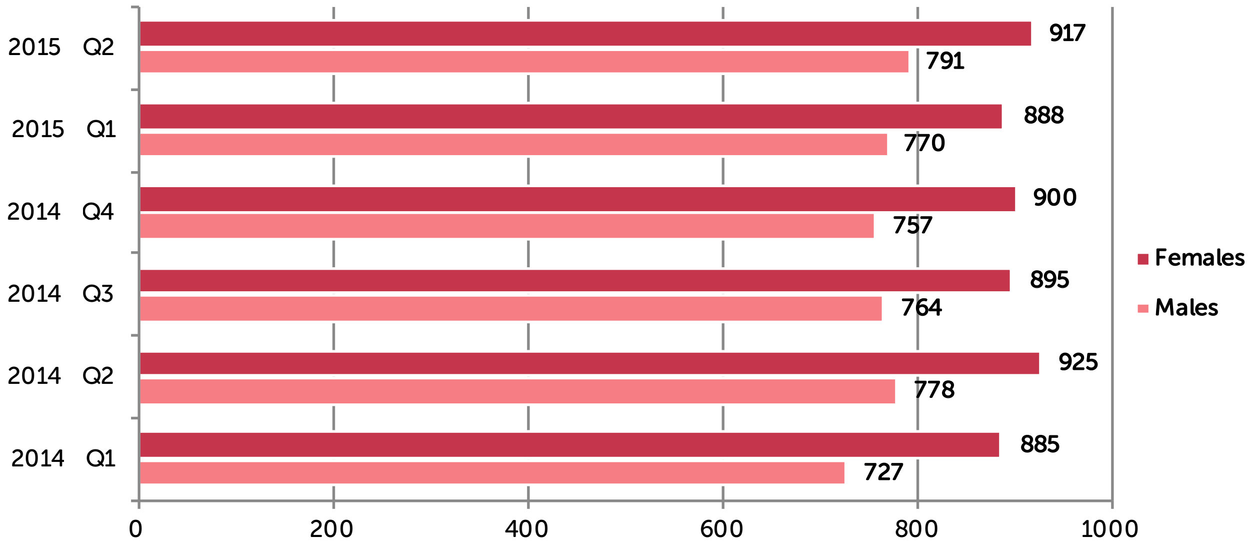
The top 5 NACEs contributing to Full-time employment in CCIs as at end of June 2015 (i.e. 2015 Q2), were:

1. 91.02 - Museums activities (19.36%)
2. 73.11 - Advertising agencies (12.68%)
3. 93.20 - Amusement and recreation services (10.68%)
4. 60.10 - Radio broadcasting (7.47%)
5. 18.10 - Printing and services activities related to printing (6.08%)

Part-time Employment (as a primary job) in CCIs

Figure 2 below displays part-time employment in CCIs between 2014 Q1 and 2015 Q2. In general, total part-time employment in CCIs increased from 1,612 in 2014 Q1 to 1,708 in 2015 Q2, equivalent to a 5.96% increase. Part-time employment in CCIs was more volatile during the period in review as it increased significantly in the second quarter of 2014, decreased in 2014 Q3, and increased marginally in 2014 Q4 and 2015 Q1.

Figure 2:



Total Employment in CCIs

Table 1 below provides an overview of the share of employment in CCIs as a percentage to total employment as at end of June 2015 (i.e. 2015 Q2). Full-time employment in CCIs amounts to 5.45% of total full-time employment, whilst part-time employment in CCIs contributes to 4.86% of total part-time (as a primary job) employment. Moreover, total employment (full-time + primary part-time employment) in CCIs as at end of June 2015 amounted to 10,991 pertaining to approximately 5.35% of employment in the total economy.

	CCIs	Total Economy	% of CCIs
Full-time Employment	9,283	170,322	5.45%
Part-time Employment	1,708	35,175	4.86%
Total Employment	10,991	205,497	5.35%

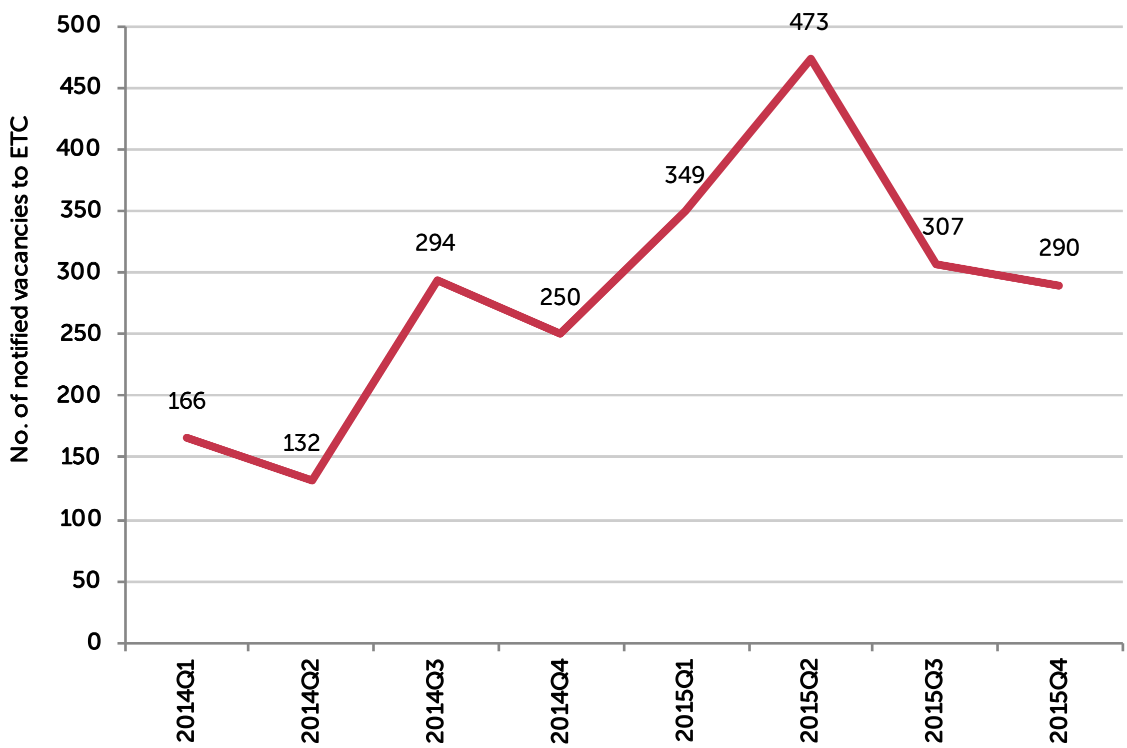
Notified Vacancies to ETC (relating to CCIs)

The number of vacancies notified to ETC relating to CCIs has also been analysed. Overall the number of vacancies pertaining to occupations within the culture and creative sector has increased from 166 in 2014 Q1 to 290 in 2015 Q4. Notwithstanding this noticeable rise, vacancies relating to CCIs have been quite unstable as evidenced by fluctuations in Figure 3 overleaf. As at the end of December 2015, the number of vacancies notified to ETC relating to CCIs accounted for 5.58% of total vacancies notified to ETC. The top 5 occupations relating to CCIs which registered the highest number of vacancies between January and December of 2015, where:

1. Printers (ISCO – 7322)
2. Software Developers (ISCO – 2512)
3. Blacksmiths, hammer smiths and forging press workers (ISCO – 7221)
4. Web & Multimedia Developers (ISCO – 2513)
5. Draught persons (ISCO – 3118)

A word of caution is warranted: these statistics emanate from the ETC database which means that the figures do not capture the total vacancies across the Maltese labour market but rather only vacancies notified to ETC which to some degree represent a subset of the former. Furthermore, a double counting problem may also be at work, since if an unfilled vacancy is reissued at a point in time after the initial closing date by the same employer, this is classified as an entirely new vacancy as opposed to a recurrent one.

Figure 3: Vacancies notified to ETC, relating to CCIs



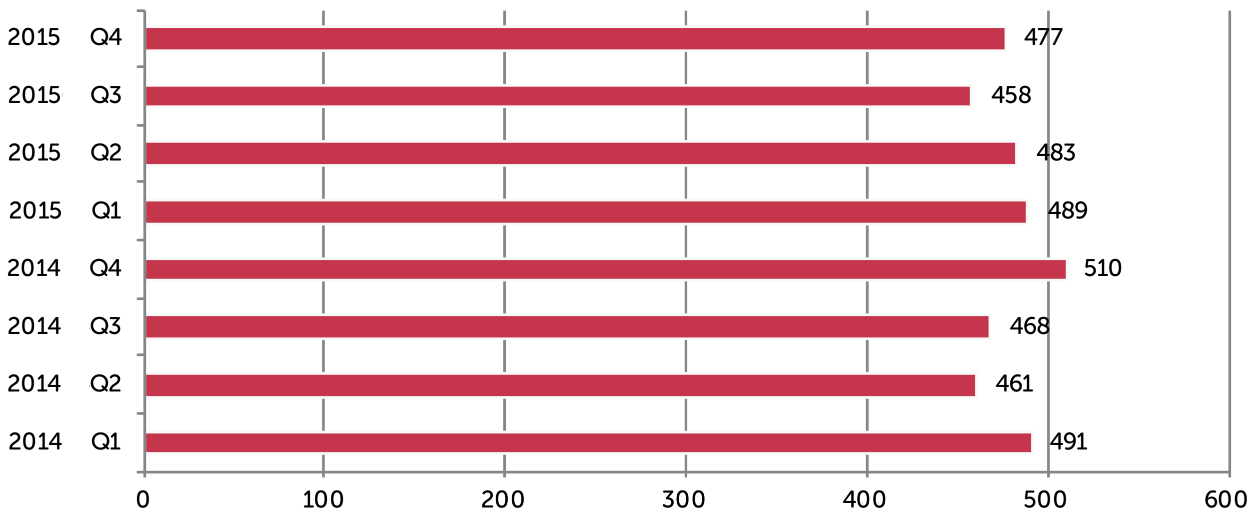
Registered jobseekers (searching for jobs relating to CCIs)

The number of jobseekers looking for jobs in the creative sector remained more or less the same during the period analysed in figure 4 below. The most noticeable increase can be observed in 2014 Q4 where the number of jobseekers registering for jobs relating to CCIs increased to 510 compared to a (simple) mean of 473 in the previous 3 quarters. This increase was mainly pertinent to occupation "2654 – Film, stage related directors and producers", since a number of jobseekers started showing interest in occupations classified under this ISCO code.

As at end of December 2015, the top 5 occupations which registered jobseekers listed as their first preference of job, where:

1. Film, stage and related directors and producers (ISCO – 2654)
2. Printers (ISCO – 7322)
3. Visual artists (ISCO – 2651)
4. Graphic and Multimedia Designers (ISCO – 2166)
5. Translators, interpreters and other linguistics (ISCO – 2643)

Figure 4: Registered Jobseekers (searching for jobs in the CCIs)



CONCLUSION & WAY FORWARD

With the research aimed at determining the effects of Valletta as a European Capital of Culture on employment, it is still too early to derive any concrete conclusions at this point in time. Ideally, the impact is observed over a number of years where one could compare pre- and post – Valletta 2018 periods, to better establish the change (if any) in employment.

Moreover, ideally such analysis would be linked with concrete measures and initiatives directly related to Valletta 2018 (such as marketing, events, festivals) to determine the actual impact of Valletta 2018 on employment. This is due to the fact that an increase in employment in CCIs may be registered but might be explained through other factors that are not related to Valletta 2018, such as a number of foreign film productions being filmed in Malta during specific periods.

- During the coming years it is envisaged that a continuous statistical analysis will continue up to 2020 on a quarterly basis and subsequently on an annual basis as well.

- Data can also be segregated further by Nationality to distinguish between Nationals, EU Citizens and Third Country Nationals working in CCIs. Furthermore, data regarding applications for work permits related to CCIs can also be analysed in an effort to possibly identify any shortages that employers may be facing with respect to the Creative Sector.

- Results relating to CCIs from the Employability Index Report, published in October 2015, will be analysed in detail during the first quarter of 2016.

- The National Council for Further and Higher Education, ETC and Malta Enterprise are currently developing a Skill Survey which should be launched in February 2016. Once the survey is conducted, the results relating to CCIs will also be extracted accordingly.

APPENDIX

Classification of NACE Codes

NACE	Classification of NACE Codes
18.10	Printing and services activities related to printing
18.11	Printing of newspapers
18.12	Other printing
18.13	Pre-press and pre-media services
18.14	Binding and related services
18.20	Reproduction of recorded media
23.13	Manufacture of hollow glass
23.41	Manufacture of ceramic household & ornamental articles
47.61	Retail sale of books in specialised stores
47.62	Retail sale of newspapers and stationery in specialised stores
47.63	Retail sale of music and video recordings in specialised stores
58.10	Publishing of books, periodicals and other publishing activities
58.11	Book publishing
58.13	Publishing of newspapers
58.14	Publishing of journals and periodicals
58.19	Other publishing activities
58.20	Software publishing
58.21	Publishing of computer games
58.29	Other software publishing
59.00	Motion picture, video and television programme production, sound recording and music publishing activities
59.10	Motion picture, video and television programme activities
59.11	Motion picture, video and television programme production activities

59.12	Motion picture, video and television programme post-production activities
59.13	Motion picture, video and television programme distribution activities
59.14	Motion picture projection activities
59.20	Sound recording and music publishing activities
60.10	Radio broadcasting
60.20	Television programming and broadcasting activities
62.01	Computer programming activities
63.91	News agency activities
71.11	Architectural activities
71.12	Engineering activities and related technical consultancy
73.11	Advertising agencies
73.12	Media representation
74.10	Specialised design activities
74.20	Photographic activities
79.12	Tour operator activities
85.52	Cultural Education
90.00	Creative, arts and entertainment services
90.01	Performing arts
90.02	Support activities to performing arts
90.03	Artistic creation
90.04	Operation of arts facilities
91.00	Library, archive, museum and other cultural services
91.01	Library and archives activities
91.02	Museums activities

91.03	Operation of historical sites and buildings and similar visitor attractions
91.04	Botanical and zoological gardens and nature reserves activities
93.20	Amusement and recreation services
93.21	Activities of amusement parks and theme parks
93.29	Other amusement and recreation activities

CONCLUDING REMARKS

The studies within this theme shed new light on the economic bearing of the European Capital of Culture, both in terms of the direct impacts on employment and training within the cultural and creative industries, as well as the secondary effects of cultural activities upon related sectors through a detailed input-output analysis.

This research reveals the dynamic nature of the cultural sector, which both feeds into and benefits from the relative strength of other related sectors, including design, manufacturing and information technology, amongst others. The cultural and creative industries have the potential to shape decisions within these linked sectors by driving as-yet untapped opportunities for growth and collaboration.

The success or otherwise of these new linkages will be observed over the coming years, as previously disparate sectors seek to consolidate their connections in the run up to 2018 and beyond, creating new commercial and industrial prospects, and further feeding the demand for employment and training linking the fields of culture, creativity and design with the world of industry.

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