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STUDY

Identification and evaluation of economic activities related to cultural and creative industries at the level of the eligible area from Romania
The Cross-Border Cooperation Program Romania Bulgaria 2014-2020

- final version -
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Content

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Acronyms List:

NACE- Classification of Economic Activities; EC- European Comission; ECIA - European Creative Industries Alliance; IMF- International Monetary Fund; CCI- Cultural and Creative Industries; EIR- European Institute of Romania; NIRCT- National Institute for Research and Cultural Training; NIS- National Institute of Statistics; OECD- Organisation for Economic Co-operation and Development; NTRO- National Trade Register Office; GDP- Gross domestic product; SOPHRD- Sectoral Operational Programme Human Resources Development 2007-2013; CCS- The cultural and creative sector; USA- United States of America; EU- European Union; UNCTAD- United Nations Conference on Trade and Development; UNESCO- United Nations Educational, Scientific and Cultural Organisation; GVA- Gross value added

1. Introduction

In general terms, the cultural and creative industries refer to a series of economic activities that rely on generating and capitalizing of creativity, ideas, knowledge and information. According to the UNESCO definition, cultural and creative industries "are economic activities that combine the creation, production and marketing of creative contents that are intangible and of a cultural nature.These contents are usually copyrighted and can take the form of a good or service. In addition to all artistic and cultural productions, cultural and creative industries include architecture and advertising."

There are thirteen sub-sectors of the economy that can be framed in the definition of "cultural and creative industries" and these are: visual arts (painting, sculpture, photography), perfomative arts (theater, dance, circus), literary and musical creation, television, video games, music, books and the press, heritage (museums, libraries, archaeological sites, archives), design (clothing design and accessories, grapic design, interior design, product design), architecture, advertising, software development original - ICT. All these activities have created the creative economy sector, in which value is based more on the use of imagination and produced results, to the detriment of using traditional land, labor and capital resourECs.

Globally, according to UNCTAD, creative industries are one of the fastest growing sectors in OECD economies, employing an average of 3-5% of the active workforce.

The potential of the cultural and creative industries (CCI) to generate economic growth has also been made aware of at European Union level since 2007 under the "European Agenda for Culture" where the second general objective was defined as “promoting culture as a catalyst for creativity in the context of implementing the Lisbon Strategy for growth and jobs." [1] The concept has been developed gradually over the years, being a widely discussed topic at the level of EU management and coordination structures to define the development policy implemented during the 2014-2020 programming period. To this end, in 2012 the European Commission issued a Communication to the European Parliament, the European Council, the European Economic and Social Committee and the Committee of the Regions[2] on the CCI in the context of the evolution of the EU economy, given the limited use of CCI within the Europe 2020 strategy. This Communication explains why economic activities within the scope of the CCI should be a focal point of development policy interest within

INTERPRET TRADUCĂTOR Limba ENGLEZĂ SANDU ALINA-DANA AUTORIZAT MINISTERUL JUSTIȚIEI 2010 the EU, showing both the current contribution of the sector to GDP and employment, and development prospects.

Thus, in 2010, it was estimated that the CCI generated about 3.3% of EU GDP and provided employment for 6.7 million people (about 3% of the total EU labor force). According to Eurostat statistics, between 2008-2011, employment in the cultural and creative sectors proved to be more stable in terms of maintaining or increasing employment compared to other "traditional" economic sectors, but the rates of growth has varied among CCI sub-sectors. This development is all the more important as some CCI sub-sectors had a higher percentage of young people than the average in the EU economy. It has also been pointed out that, in some cases at local and regional level, strategic investment in the CCI sector has produced spectacular results. In particular, the European Capitals and Festivals have produced important economic benefits, with the potential to generate up to 10 higher incomes compared to the investments made for organizing and conducting events. The Communication describes both the challenges faced by the CCI sector and the importance of defining a multilevel governance strategy and the key role of the EU in building the framework and context for the development of the CCI.

The statement described above has been a key document for recognizing the contribution and potential for economic growth of the cultural and creative sector in all EU Member States and for defining specific actions to support the development of this economic branch.

[1] http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?url=ECLEX:52007DC0242&from=EN

[2] COM (2012) 537, 26.9.2012 - Promoting cultural and creative sectors for growth and jobs in the EU

Another important event of 2012 with a medium and long-term positive impact on the evolution of the CCI sector was the establishment of the European Creative Industries Alliance (ECIA) as an initiative of the EC's General Directorate for Enterprise and Industry. ECIA is an open platform, currently active at the level of 2017, which combines the analysis of policies applicable to this sector with the management of concrete actions to support the CCI sector (promoting pilot projects) to ensure better access to finance, while at the same time the framework for cooperation to develop and test policies and instruments applicable to the creative and cultural industries. Currently, ECIA brings together policy makers and representatives of CCI contractors from 28 partner organizations and 12 Member States. In 2013, the European Parliament resolution of September 12th, 2013 *on the promotion of European cultural and creative industries as sources of growth and jobs (2012/2302 (INI))* was published in which the conditions to be met for the development of the CCI , recommendations for improvement of the status and working conditions of employees in the CCI sector are provided, funding needs and support for this sector are identified by defining specific instruments and funds, opportunities and threats for the evolution of the CCI in the EU context are described.

All these steps taken at European level have highlighted the economic benefits that can be generated by supporting the operation and development of the CCI sector. If by 2014, EU funding programs addressed in a relatively dissociated way projects targeting culture and those targeting economic activities based on creativity (two programs were distinct in the period 2007-2013: the Culture Program - support for cultural cooperation in the EU and the Media Program - support for the EU audiovisual industry), the Creative Europe (Creative Europe) program - adopted in December 2013, which can be accesed by applicants from all EU Member States is the main integrated framework for the development and financing of cultural and creative actions.

Industrial and creative industries operate in a complex business environment defined by both standard business regulations and issues such as intellectual property rights and taxation. Both in Romania and Bulgaria, economic activities in the creative and cultural sphere are perceived as a less essential sector for the economy of the territory. The goods and services generated by them are considered important only from the perspective of the consumer education and recreation potential, and not as a real economic activity. In this context, the present study aims to analyze the potential for development of creative and cultural economic activities at the level of Mehedinți, Dolj, Olt, Teleorman and Giurgiu counties in Romania. In this respect, the study includes an analysis of the current context at the level of the territory concerned from the point of view of the demographic and economic factors; identifies areas of concentration of cultural and creative economic activities; analyzes the strengths, weaknesses, opportunities and threats specific to this sector; assesses the development potential of CCI subsectors; identifies the main sources of funding at national / community level, including the economic sector of the creative and cultural industry.

The methodology used in the development of the study is based on a mix of methods to ensure cross-check and holistic character for the findings from the analysis of available data. Thus, both office research (documentary research and statistical analysis) and field research were used. The field research was organized at the level of all five counties targeted by the survey and implied the use of questionnaires among economic agents and project beneficiaries operating in the CCI sector as well as the holding of interviews with county key stakeholders or the request for data (the Trade Register Office, the Chamber of Commerce and Industry, representative organizations for the economic environment). The results of field research completed and integrated the information gathered through documentary research, confirming the relevance of the findings in relation to the reality in the territory.

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2. Contextual analysis

The subject of the CCI is a topic frequently addressed at European level and increasingly present in the political and strategic context at national level.

2.1. Public policy documents on the Cultural and Creative Industries at European level

In 2010, the EC published the "Green Book - Delivering the potential of cultural and creative industries", which provided a holistic description of the political and strategic context of the CCI, the main levers and conditions for the development of this sector, the importance of systematic approach on several levels of governance of actions dedicated to capitalizing on the potential of the CCI and the potential results that can be achieved by implementing an appropriate set of development measures. This document highlights the fact that the CCI is confronted with a constantly changing context, characterized in particular by the speed of ICT development and deployment on a global scale. This is the result of expanding the coverage of broadband infrastructure, which reduces physical and geographical constraints on access to information for entrepreneurs and, in particular, for consumers. However, economic operators in the CCI sector need to find solutions and support to adapt to this new business environment, which is a challenge to the traditional production and consumption patterns previously characterized by the CCI sector. The transition to new production systems can be achieved by creating new opportunities for experimentation, innovation and entrepreneurship development in the CCI sector by correctly identifying the skills needs of CCI staff and by providing access to finance (creating tools and informing economic operators functioning in the CCI sector). Sector development can only be achieved through an integrated approach of relevant initiatives at different levels of governance, starting from local and regional ones (policies for cultural and creative industries are primarily local, as favorable conditions for the development of different CCI sectors varies strongly between territories). Also a key element is the provision of mobility and circulation of products generated by CCIs. Last but not least, the transfer of information, cultural exchanges and international trade are fundamental pillars for the formation of a distinctive and dynamic image of Europe, promoting its

INTERPRET-TRADUCĂTOR Limba ENGLEZĂ SANDU ALINA-DANA AUTORIZAT cultural heritage and opening up to other cultures. The document has been endorsed by the EU institutions and has been the basis for defining European support initiatives for the CCI sector for the current programming period.

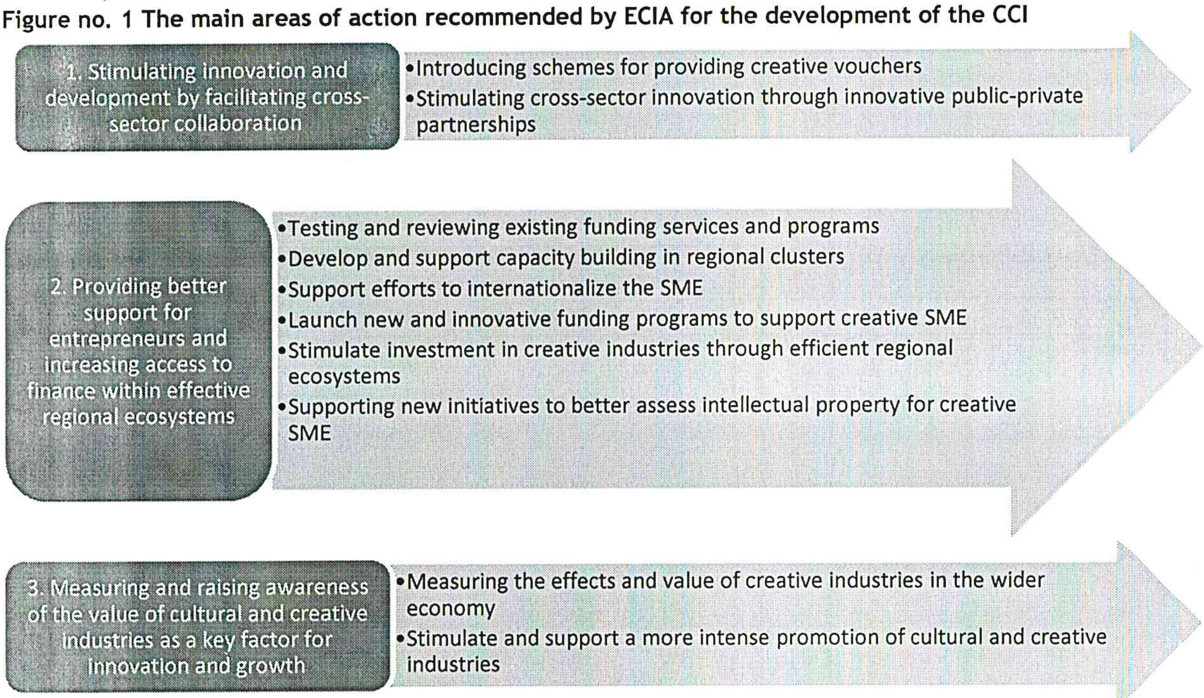
The relative advantage or disadvantage of a particular country in a given class of goods or services, as evidenced by the trade balance, is calculated annually on the basis of data provided by the OECD and the IMF. The index of competitive advantage[3] in the services industry - the cultural and recreational sector, calculated for 2012 at the level of the EU Competitiveness Report (2014), places firstly the EU in relation to the other global industries (USA, Japan, China, Russia, India, Brazil) the index being 1.38. Thus, the EU has a competitive advantage in terms of cultural and recreational services provided, which once again confirms the opportunity to implement policies and instruments to support the CCI, given the existing growth potential. At the level of Romania and Bulgaria, the calculated value of the index was 0.75, respectively 0.77, the economies of the two countries being characterized by disadvantages in relation to this type of services. This determines the need to adopt strategic measures for the development of the CCI at MS level, leading to an increase in the sector's contribution to the national trade balance.

In 2014, ECIA published a policy agenda relevant to supporting the CCI sector, integrating the contributions of key actors in the Platform, including policy makers and CCI entrepreneurs from 28 partner organizations and 12 Member States.

[3] A comparative advantage is confirmed if the index value is bigger than 1. If the index value is smaller than 1, the country has a comparative disadvantage in that industry.

The proposals contained in this Agenda are based on examples of good practice across the EU and a benchmarking analysis of the most feasible support tools for the CCI sector. The recommendations provided for a new CCI policy agenda relate to three main areas of action, each of which includes several specific measures as follows:

Figure no. 1 The main areas of action recommended by ECIA for the development of the CCI



Source: Data Processing within the document Create, Innovate, Grow - A new policy agenda to maximise the innovative contributions of Europe's creative industries, 2014

According to a study conducted in 2015[4] at European level, the number of medium-sized enterprises active in the cultural and creative industries sector is reduced due to the lack of financial resources of small companies to expand. In a study published in 2013, the European Commission estimated that the financing gap for European businesses operating in the CCI sector was USD 8.7 - 14.5 billion and requested new financial instruments to support industry growth and stimulate the development of small businesses. International competition and accessibility of products delivered by the CCI from the foreign market (imports) slowed the pace of development of this sector at European level.

2.2. Public policy documents on the Cultural and Creative Industries at national level

In Romania, the concept of creative and cultural industries has been analyzed and promoted since 2009 through projects funded by EU funds[5] and studies developed by various institutions such as the National Institute for Research and Cultural Training (NIRCT) or the European Institute of Romania (EIR). Until now in Romania, no public policy or regulatory framework dedicated exclusively to the valorisation of the CCI sector has been defined, but there are a number of specific milestones integrated in the The Sectoral Strategy for Culture and National Patrimony for 2014-2020, the National Competitiveness Strategy 2014 -2020 and the 2014-2020 Partnership Agreement signed

[4] http://unesdoc.unesco.org/images/0023/002357/235710E.pdf, "Culturral times - The first global map of cultural and creative industries

[5] For example, the project "Promotion of Entrepreneurship in Creative Industries" funded by Priority Axis 3 "Increasing adaptability of workers and enterprises", Major Field of Intervention 3.1 "Promotion of Entrepreneurial Culture" of SOPHRD 2007 - 2013 - http://oricum.ro/promovarea-antreprenoriatului-in-industrii-creative/130/

between Romania and the EU.

In the Sectoral Strategy in the field of Culture and National Heritage for the period 2014-2020, two strategic sectoral objectives were defined, namely "1. Protecting the National Cultural Heritage "and" 2. Supporting and promoting European cultural and artistic creation ". Within the document, the cultural and creative sector is analyzed in particular through its cultural activities, with particular attention paid to public institutions and its specific infrastructure. The specific objectives defined in the strategy include the development of entrepreneurial culture in the cultural and creative industries, the identification of potential tax incentives and the facilitation of access to credit and other funding instruments for cultural SME.

In the National Competitiveness Strategy, a vision has been defined to "develop competitive businesses in an ecosystem capable of supporting global excellence, openness and favorable to free initiative and innovation, stimulating productivity growth and geared towards integrated and sustainable transformation of the Romanian economy ". The specific objectives of this relevant strategy in relation to the evolution of CCI are: industrial revitalization through smart specialization and transformation of knowledge into a competitive feed-forward; training of production and technological development centers of regional and international competence; redefining industrial policies by moving towards innovation and strengthening the functioning of the market.

The 2014-2020 Partnership Agreement highlights the importance of supporting creative industries, given their potential contribution to increasing the competitiveness of the economy. This should be integrated with investments in cultural and human resources for cultural infrastructure restoration.

Last but not least, the development potential of the CCI was indirectly analyzed at regional level through the Smart Specialization Strategies developed in 2013-2016, the ICT sector (subscribed to the CCI sector) being identified in most cases as a transversal development domain and the main pillar of regional innovation and the revitalization of the local economy.

In 2016, NIRCT published the first strategic document focused exclusively on the CCI sector, which is the first important step towards adopting a specific national policy that capitalizes on the potential of the cultural and creative industries. Thus, the White Charter for Enabling the Economic Potential of the Cultural and Creative Sector in Romania had as purpose the defining guidelines to serve as a basis for future policies applicable to the CCI sector. The document defines the cultural and creative sectors, presents their stage of development and highlights their economic and social potential. The document identifies transversal policies that influence the evolution of the CCI, such as those applicable in the field of education and training, territorial development and social cohesion. As a result of the analysis, it was possible to formulate the main objectives and directions for action to activate the economic potential of the CCI sector, these being[6]:

[6] The White Charter for Enablig the Economic Potential of the Cultural and Creative Sector in Romania , chapter 7. Guidelines

Figure no. 2. The main objectives and directions of action for capitalizing on the economic potential of the CCI

1. Ensuring the institutional framework necessary to support CCS by aligning the agendas of various relevant public institutions and organizations on the initiative of the Government, including those relating to the protection of intellectual property, cultural and natural heritage, public procurement, taxation etc.
2. Taking policies and strategies with reference to the cultural and creative sectors at central level and promoting the responsibilities of local public authorities
3. Optimizing and facilitating access to finance, banking and non-bank financing for CCS economic operators
4. Catalyzing the propagation effects of CCS in as many economic and social contexts as possible
5. Creating a participatory organizational culture of public decision in favor of entrepreneurship in CCS

Source: Data processing included in the White Charter on Enabling the Economic Potential of the Cultural and Creative Sectors in Romania, 2016

In order to set up a specific consultation and governance mechanism, the White Charter proposes that the first step of setting up an inter-ministerial working group to support the CCI sector is to be consulted regularly with representatives of public and private operators (profit and non-profit) who are active in the CCI sector. This proposal was adopted by an Executive Memorandum of the Government in May 2017, thus creating an inter-ministerial working group to ensure the institutional framework necessary to support the cultural and creative sectors by protecting intellectual property, tax incentives for economic operators active in this area and monitoring public procurement provisions.

2.3. Analysis of the Cultural and Creative Industries sector evolution at national level

In 2012, the share of CCI in GDP was around 7%, with the national economic contribution to this sector reaching similar values to those of the period before the economic crisis. The most important branch of CCI in terms of number of employees and labor productivity was the software and ICT industry (accounting for about 4% of GDP). However, there are large territorial disparities in terms of the distribution of CCI subscribed activities, Bucharest being a polarizing center employing more than half of the workforce in this sector and accounting for about 70% of the total turnover of the sector CCI. In 2013, according to Eurostat data, the gross value added by the CCI was EUR 8,214.7 million, registering an increase of over 80% compared to 2009[7]. However, the increase in GVA was mainly determined by only two sub-branches of the CCI economy, namely (1) Computer programming activities, consultancy and information services, and (2) Creative, artistic and entertainment activities ; libraries, archives, museums and other cultural activities; betting and

7 The data analyzed below are broadly presented in the Study "Creative and Cultural Sectors in Romania, Economic Importance and Competitive Context", INCFN, 2015 http://www.culturadata.ro/wp-content/uploads/2016/03/Sectoarele-Culturale-si-Creative.pdf

gambling activities. Analyzing the GVA at national level it is noticed that the share of CCI generated by CCIs is increasing from 4.2% in 2009 to 6.5% in 2013 (EU average in 2012 was around 5%). From the perspective of the number of companies operating in the CCI sector (these being 6.62% of the total Romanian companies), 3 sub-branches focused on the level of 2013 about half of the total number of active units: advertising, ICT and architecture . With regard to the number of employees in the CCI sector (accounting for 3,85% of the total number of employees at national level), about 40% were in the ICT sector. Turnover generated by the CCI sector accounted for 2.69% of the total national indicator in 2013, with the main sub-branch of the CCI also being the ICT sector (accounting for about 40% of the CCI's turnover).

Figure no. 3 Change in the number of firms, employees and turnover for the CCI sector between 2009 and 2014: *Source: NTRU Data Processing, 2015; Study "The creative and cultural sectors in Romania. The economic importance and the competitive context "*

Number of companies within the CCI sector in Romania | **Number of employees within the CCI sector in Romania** | **The turnover within the CCI sector in Romania**

According to the data provided by NTRU, in 2014, there is a slight increase in the number of companies and employees in the CCI compared to 2009 (+ 0.26% and +0.38 respectively). However, the turnover increased significantly over the same period, being over 17% higher in 2014 compared to 2009. Most newly established companies in the CCI sector in the period 2009-2014 carried out software on order (over 1,000 new establishments), and most of the companies radiated during the same period underwent architectural activities (more than 750 radiated units). Over the period 2009-2014, more than 18,000 jobs were created in the custom-made software development business, and more than 5,000 employees lost the architecture industry. However, the largest decrease in absolute terms of turnover was recorded by the activities of the advertising agencies in the period 2009-2014, and the largest increase was recorded for the units carrying out software development activities.

2.4. Analysis of the Cultural and Creative Industries sector evolution at the level of Mehedinţi, Dolj, Olt, Teleorman, Giurgiu counties

Out of the 5 counties concerned by the present study (Mehedinţi, Dolj, Olt, Teleorman, Giurgiu), only Dolj county has registered among the first 20 counties with significant contribution to the CCI in 2014 considering 3 dimensions analyzed: the number of active local units, the number of employees and the turnover. Thus, in 2014, Dolj County accumulated 1.98% of all companies and 1.71% of all employees working in the CCI sector, producing 0.9% of the turnover. There is a slight decrease in these shares for County Dolj compared to the values registered in 2009. Dolj County is ranked the 8th at national level in terms of contribution to the number of companies, employees and turnover for custom software development activities .

The evolution of the CCI sector in the period 2014-2016 at the level of the study area (Mehedinţi, Dolj, Olt, Teleorman, Giurgiu counties) is presented below based on the statistical data provided by NIS and NTRU. The indicators analyzed are:

- Active local units by size classes by number of employees[8]
- Average number of employees[9]
- Number of newly created enterprises
- Number of radiated enterprises
- Gross average annual earnings[10]

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8 There are analyzed the total annual values and on NACE 18,23,32,58,59.62,63,73,74,90,91

9 There are analyzed the total annual values and on NACE 18,23,32 and total annual values and NACE Rev. 2 - M: Professional, scientific and technical activities; R: Arts, entertainment and recreation

10 There are analyzed the total annual values and NACE Rev. 2 - M: Professional, scientific and technical activities; R: Arts, entertainment and recreation

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Figure no. 4 Total number of active local units operating in the CCI sector at county level in the period 2014-2016
Source: Data Processing NIS, 2017

As regards the total number of active units registered in the CCI sector, it increased by over 16% over 3 years. In fact, all the counties analyzed had an increase in this indicator, Olt County reporting the best performance in this respect (+ 31%). Dolj County occupies the first position in relation to the number of local units active in the CCI sector throughout the analysis period, being followed by Olt County. Mehedinti County records the lowest number of local units active in all the analyzed years. The Giurgiu and Teleorman counties record similar values of the indicator analyzed during the whole analysis period, but these are 5 times smaller compared to the reported values in Dolj County.

Figure no. 5 Number of active local units operating in the CCI sector, at NACE division level Rev. 2. 2, by counties in 2014-2016
Source: Data processing NIS, 2017
18- Printing and reproduction of recorded media
23 - Manufacture of other non-metallic mineral products
32 - Other manufacturing
58 - Publishing activities
59 - Motion picture, video and television programme production, sound recording and music publishing activities
62 - Computer programming, consultancy and related activities
63 - Information service activities
73 - Advertising and market research
74 - Other professional, scientific and technical activities
90 - Creative, arts and entertainment activities
91 - Libraries, archives, museums and other cultural activities

Most local units active in the CCI sector at the level of the analyzed territory (Mehedinţi, Dolj, Olt, Teleorman, Giurgiu counties) during the period 2014-2016 worked in the IT sector (NACE 62, 63), advertising (NACE 73) and other professional, scientific and technical activities (NACE 72). From the perspective of absolute variation, most units were established between 2014 and 2016 in the field of other scientific and technical activities (+83) and in the information technology services sector (+61), while editing activities recorded the highest pronounced decrease (-16).

In relation to the percentage change, artistic creation and production activities registered the largest increase in the period 2014-2016, at the level of the analyzed territory, the number of units increasing by more than 250% (from 37 units in 2014 to 85 units in 2016) . In the same period of analysis, the most significant percentage reduction was attributed to editing activities (-8.21%, 128 units in 2016 compared to 135 units in 2014). It is noted that the number of local units operating in the CCI sector had an increasing trend during 2014-2016, only 3 NACE Rev. 2 with slight decreases (NACE 18, 58, 73).

Figure no. 6 Relative evolution 2014/2016 of the number of local active units subscribed to the CCI sector at the analyzed territory level compared to the national average
Source: Data processing NIS, 2017

By comparing the number of local units active in the CCI sector at the level of the surveyed territory with the evolution of the national indicator, a synergistic evolution is observed for the majority of analyzed NACE Diseases. Nevertheless, the five counties in comparison with the national average compared to the artistic creation and production activities, respectively the video and music production activities. In order to analyze the number of newly created enterprises and radiated enterprises operating in the CCI sector in 2014-2016, the data provided by ORC at the county level were used.

Figure no. 7 Number of enterprises created in the period 2014-2016 operating in the CCI sector by counties
Source: Data processing ORC from county level, 2017

Figure no. 8 Number of enterprises banned during the period 2014-2016 operating in the CCI sector by counties
Source: Data processing ORC from county level, 2017

Most companies operating in the CCI sector were created in 2015 at the level of the analyzed territory, while in 2014 and 2016 the most radiated companies were registered (46 units in each of the two years). In Olt County, the largest number of companies set up in the CCI sector were registered in 2014-2016, respectively 208 units, the lowest value of the indicator in the same period of analysis being attributed to Mehedinţi County (90 units). Mehedinţi County also records the largest number of businesses banned during the 2014-2016 period in the CCI sector (76 radiated companies). For Dolj, cumulative information was provided only at the level of the entire analysis period and only in relation to the number of radiated enterprises operating in the CCI sector (69 companies radiated in 2014-2016).

Figure no. 9 Number of companies created in 2014-2016, active in the CCI sector and not emitted until October 2017

Source: Data processing ORC from county level, 2017

Red- Companies set up during 2014 - 2016, operating in the CCI sector and which were not radiated until October 2017 set up

Blue - Total of companies in 2014-2016 operating in the CCI sector

Of the total number of enterprises created in the 2014-2016 period in the CCI sector, most of them maintained their activity and were not radiated until the end of October 2017. The worst performing county in this respect is Giurgiu, which was in October 2017 only 78% of the CCI enterprises set up in 2014-2016 and Teleorman County have the best performance with over 95% of companies set up in 2014-2016 remaining active until October 2017. Most companies in the CCI sector set up in 2014-2016, which closed the activity until October 2017, were in Olt County (38).Most companies active in the CCI sector in 2014-2016 were registered in Dolj County (511), followed by Teleorman County (482) and, to a considerable extent, by Mehedinţi County (246)[12].

Figure no. 10 Total number of employees in the industrial sector related to CCI, by counties, during 2014-2016

Source: Data processing NIS, 2017

Figure no. 11 Average number of employees at the level of the NACE Rev.2 division (in the industrial sector) related to the CCI, by counties, during 2014-2016

Source: Data processing NIS, 2017

In terms of the number of employees in the industrial sector related to the CCI, Dolj County records the highest values, with about 1,400 employees in 2016 (+ 40% compared to 2014), most of them being included in units of manufacturing other non-metallic mineral products . A significant increase in the number of employees was also recorded in Giurgiu County (+ 23%), due mainly to the establishment of 3 new companies in the other industrial activities sector (NACE 32). Mehedinti County records the largest number of employees in other industrial activities at the level of the analyzed territory. In Teleorman County, the number of employees in the industrial sector related to CCI decreased significantly by almost 25% over 3 years, although the number of local active units remained almost constant. Olt County recorded a slight decrease in the number of employees (-8%) even though the number of local units increased during the analyzed period. This fact shows that the companies belonging to the CCI industrial sector in the counties of Teleorman and Olt reduced their average number of employees during 2014-2016.

Figure no. 12 Relative evolution 2014/2016 of the average number of employees in the industrial sector related to the CCI at the level of the territory analyzed compared to the average recorded at national level

Source: Data processing NIS, 2017

18- Printing and reproduction of recorded media

23 - Manufacture of other non-metallic mineral products

32 - Other manufacturing

Analyzing the evolution of the average number of employees at the level of the target territory as compared to the national evolution, one can notice the impressive performance of the five counties in relation to the average number of employees in the NACE 18 and 32. However, the average number of employees in the industrial sector related to the CCI in the 5 counties represent only 4% of the total national.

In order to form an image of the number of employees in the services sector related to the CCI, given the unavailability of data at the level[13] of NACE Rev. 2, the values of the indicator related to the NACE Rev. 2 sections[14] were analyzed. 2 - J. Information and communications; M. Professional, scientific and technical activities; R. Arts, entertainment and recreation[15].

[12]For Olt and Giugiu counties no data on this indicator was provided by ORC.

[13] The second qualification level of NACE code, consisting of titles identified by a two-figure numeric code

[14] The first qualification level of NACE code, consisting of titles identified by an alphabetical code

[15] The list of NACE codes included in the three sections can be found in Annex 1 of the study or on the website www.coduricaen.info

Figure no. 13 Average number of employees per section CANE Rev. 2 - J. Information and communications, by gender, by counties, 2014-2016

Source: Data processing NIS, 2017

Total; Male; Female

Figure no. 14 Average number of employees per section CANE Rev. 2 - M. Professional, scientific and technical activities, by gender, by counties, 2014-2016

Source: Data processing NIS, 2017

Total; Male; Female

Figure no. 15 Average number of employees per section NACE Rev. 2 - R. Arts, entertainment and recreation, by gender, by counties, during 2014-2016

Source: Data processing NIS, 2017

The average number of employees in the field of information and communication increased in Dolj (+ 15%), Olt (+ 13%) and Teleorman (+ 11%) in the period 2014-2016 and decreased in Mehedinţi (-21%). and Giurgiu (-24%). The proportion of female employees remained constant at the level of the five counties in the analyzed period, around 33% of the total number of employees. Regarding the average number of employees classified at section M according to NACE Rev. 2, the values recorded at county level show a significant positive evolution for Olt County (+ 40% in 2016 as compared to 2014),Giurgiu and Teleorman counties also registering positive evolutions (+ 14% and + 10% respectively). In County Dolj there was a slight decrease (-1%) but it provides most of the employees included in this section NACE Rev. 2 during the analyzed period (about half of the total number of employees). The most significant decrease of the average number of employees classified at section M according to NACE Rev. 2 in the period 2014-2016 was reported by Mehedinţi County (-24%). The proportion of female employees remained constant at the level of the five counties during the analyzed period, around 42% of the total number of employees. Referred to section R according to NACE Rev. 2, the average number of employees decreased in the period 2014-2016 by about 4.5%. The most significant decreases were in the counties of Teleorman and Mehedinţi (-23% and 15% respectively), followed by Giurgiu county (-4.6%). Dolj and Olt counties reported slight increases (+ 1.6% and 1.9% respectively) of the average number of employees classified at section level according to NACE Rev. 2 in 2014-2016. If in 2014 the average number of female employees was 59% of the total number of employees in the territory of the five counties, in 2016 the percentage fell below 55%.

Figure no. 16 Relative evolution 2014/2016 of the average number of employees on the NACE Rev. 2 J, M and R

Source: Data processing NIS, 2017

J - Information and communication
M - Professional, scientific and technical activities
R - Arts, entertainment and recreation
Blue - Average of the analyzed territory
Red - National

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At national level, the average number of employees increased in 2016 compared to 2014 for all analyzed NACE sections (J, M and R). However, the variation calculated for the five counties concerned was lower than the national variations for NACE sections J and R, which was even negative - the average number of employees in 2016 was lower than in 2014. Given that the total number of local units active in the CCI services sector in the five counties had a similar evolution to the one calculated at national level, at least in the case of the NACE Rev. 2 R, it can be concluded that the local economic environment encountered financial difficulties during the period 2014-2016 which led to staff redundancies.

Figure no. 17 Gross monthly nominal earnings per section NACE Rev. 2 - J. Information and communications, by gender, by counties, 2014-2016

Source: Data processing NIS, 2017

Total; Male; Female

Figure no. 18 Gross monthly nominal earnings per section NACE Rev. 2 - M. Professional, scientific and technical activities, by gender, by counties, 2014-2016

Source: Data processing NIS, 2017

Total; Male; Female

Figure no. 19 Gross monthly nominal earnings per section NACE Rev. 2 - R. Arts, entertainment and recreation, by gender, by counties, during 2014-2016
Source: Data processing NIS, 2017
Total; Male; Female

Gross average monthly salary in case of NACE Rev. 2 J had a spectacular growth in Olt County in 2014-2016 (+ 61%). All counties registered salary increases, but in the case of Teleorman County this was insignificant (+ 3%). In 2016, the highest average gross salaries are reported in Dolj (3,699 lei) and Olt counties (3,631 lei), and the lowest in Teleorman County (1,931 lei). In general, with the exception of Mehedinţi County, the average wage for men is higher than that of women employed in this sector of the economy.From the perspective of gross nominal earnings at the level of NACE Rev. 2 M it increased in the period 2014-2016 in all counties analyzed. The most important increase was registered by Olt County (+ 62%) - the highest value of the gross average salary in the year 2016 (3,491 lei), and the lowest in Dolj county (+ 4%) - the lowest value of the gross average salary in 2016 (2,350 lei); the average growth in the five counties is + 30% and the average salary is 2,978 lei. As regards gross nominal earnings at the level of NACE Rev. 2 R, the evolution of its average in the five counties is similar (an increase of + 32%), but the individual situations at the county level evolved differently. In this case, Dolj County occupies the first position, with an increase of + 58% in the 3 years of the analysis, and the last place is the Giurgiu and Olt counties with a + 20% increase. There is a significant difference between the county wage earners in the case of employees carrying out activities related to the NACE Rev. 2 R: In 2016, Dolj County is ranked first, with 2.484 lei, all other counties registering values in the range 1.710 lei - 1.783 lei. Analyzing the evolution of the earnings in terms of gender distribution, in the case of NACE Rev. 2 M, the salaries of female employees are slightly higher compared to male employees, but the situation is reversed for NAEC Rev. 2 R. For both NACE sections analyzed, the average wage growth over the 2014-2016 period was higher for male employees.

The monthly gross average wage increased at national level in 2014-2016 by 23% in the case of employees with activities at the NACE Rev. 2 M and 27% respectively for NACE Rev. 2 J and R. The average variation of the indicator in the five counties analyzed exceeded the average national growth in the period 2014-2016 for both NACE sections (+ 31%).

Figure no. 20 Relative evolution 2014/2016 of gross nominal average monthly earnings per NACE Rev. 2 J, M and R
Source: Data processing NIS, 2017
J - Information and communication
M - Professional, scientific and technical activities
R - Arts, entertainment and recreation
Blue - Average of the analyzed territory
Red - National

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Thus, although the number of employees in the counties of Mehedinţi, Dolj, Olt, Teleorman, Giurgiu fluctuated differently compared to the national average, the employees from the NACE M and R sections received salary increases higher than the average national average increases. Nevertheless, from an absolute perspective, wages in the five counties remained lower in 2016 compared to the nationally calculated value (5,678 lei - national, 2,866 lei - territorial for the J section, 4,154 lei - national, 2,978 lei - Territorial for Section M; 2.179 lei - national, 1.899 lei - Territorial for Section R). In order to complete the analysis of the documentary analysis, extensive fieldwork was carried out by applying questionnaires to the companies operating in the CCI sector and to the beneficiaries of projects that focused on the development of the CCI activities component, so that the relevance of the conclusions drawn would be confirmed by the reality of the local economic environment. Interviews with key actors from each county were also conducted.

The questionnaires were applied at the level of the five counties concerned, namely Mehedinţi, Dolj, Olt, Teleorman, Giurgiu. Most of the responses were received from businesses operating in the CCI sector located in Dolj county (43% of respondents). Most respondents have a working place where they work (94%), one respondent (established in 2006) reporting two active work points.

Figure no. 21 Principal NACE Rev 2. codes attributed to economic activities in the CCI sector of the respondents to the questionnaire
Source: Own processing of questionnaire replies, 2017
Red=Number of respondent companies

Approximately 50% of respondents fall into one of the five NACE codes included in the chart below. The most frequently encountered economic activity among respondents is the execution of custom software (NACE 6201), followed by photographic activity (NACE 7420). Other economic activities frequently reported by respondents include other printing activities (NACE 1812), retail of newspapers and stationery in specialized stores (NACE 4762) and fabrication of other manufactures (NACE 3299). In field research, respondents were involved on 26 distinct NACE Rev.2 codes.

Figure no. 22 Types of activities in the field of cultural and creative industries conducted at the level of the respondent companies
Source: Own processing of questionnaire replies, 2017

The highest percentage of respondents reported that the economic activity of the printing, binding and publishing of the publications (39%) was reported. The second position is occupied with the editing and / or realization of software products, PC games or web portals (18%), while photographic activities and the manufacture of toys / jewelry / musical instruments / ceramic products occupy the third position, each involving 11-12% of respondents. In terms of the year of establishment, most respondents to the surveyed CCI sector are recently established in the 2010-2017 period (58%). There are also respondents who have been active in the CCI sector since 1992-1999 but a much lower share (15%). According to the information gathered, the main reasons indicated by the respondents that triggered the activities in the CCI are the desire to self-manage the time and financial resources invested in the professional activity (61%), the transformation of the hobby into a professional occupation (15%), increased demand for products on the market (14%) and the implementation of concepts studied in various educational institutions (10%). Among the benefits of conducting an activity in the CCI sector respondents to the interviews listed: the possibility of accessing non-reimbursable funding sources, the existing human resource, the tax incentives at the start of activity (reduced taxes in the first years of activity), the freedom to create and design products and services which can facilitate customer loyalty and the concrete identification of a target consumer group or sales outlet with certain characteristics. Although most respondents invested their own capital resources in starting up their business, over 60% of them did not conduct a market survey earlier to determine potential supply and demand.

Figure no. 23 Evolution of turnover at the enterprise level since the commencement of activities in the CCI to date
Source: Own processing of questionnaire replies, 2017
Turnover increased significantly (by over 75%)
Turnover increased sentiently (between 25-75%)
Turnover increased slightly (between 0-25%)
Turnover remained constant
Turnover decreased slightly (between 0-25%)
Turnover decreased sentiently (between 25-75%)
Turnover decreased significantly (by over 75%)

Figure no. 24 Evolution of the number of employees at the level of the enterprise since the commencement of activities in the CCI to date
Source: Own processing of questionnaire replies, 2017
The number of employees increased
The number of employees remained constant
The number of employees decreased

Although most of the respondents (60%) indicated that turnover is on an upward trend, only a third of them used the extra income generated by this activity to create new jobs. Revenues or profits are reinvested in the firm's activity by more than 80% of respondents to support current activity; only 9% of respondents use bank services (such as credit lines with refinancing) to cover current expenses. However, it is important that in the case of three-quarters of the respondents, the number of jobs at the enterprise level has been at least maintained since the beginning of the CCI activities. Also, most companies have indicated that senior employees retain their jobs, with no policy of hiring specialized staff to the detriment of older, less specialized or non-relevant academic staff. Specializing in human resources and employing qualified staff in the field is one of the conditions for the development of CCI activities, according to information gathered through interviews. Other key elements for ensuring the sustainability of activities are innovation in production, product promotion and marketing, knowledge and information on potential sources of funding (non-reimbursable funds, lending banking instruments, private investors, etc.)

Figure no. 25 Difficulties faced by CCI operators
Source: Own processing of questionnaire replies, 2017

In order to assess the main difficulties encountered by operators operating in the CCI sector, a scoring scale for a list of items was used. National legislation and market competition generate the greatest difficulties for CCI operators, with an average score of 3.5 (1 - creates very few difficulties, 5 - creates many difficulties).

According to the answers received in the interviews, there are no specific legal rules applicable to the CCI sector, so that the difficulties reported by the questionnaire response can be considered to characterize the economic environment in general. Existing demand has achieved the lowest score, which means that operators are satisfied and meet the needs of consumers. According to the information gathered through interviews, other difficulties faced by CCI active operators are: inconstant cash-flow that largely depends on the consumer's response time; high risk in the case of the placing on the market of new untested products which are not known by consumers and require intensive promotion; difficult financial funds to support or develop activities (high costs involved in obtaining a credit, impossibility to provide the guarantees required by the banking institution, cumbersome and lengthy proECdure for obtaining grants. It is notiECd that the activity of CCP-related operators is not predominantly local but at least regional (over 60% of respondents provide products / services at regional or national level). In this context, information technology and product marketing have played a key role in promoting the services and goods produced by the CCI sector. One third of respondents mostly work locally. Only 4% of the surveyed economic operators provide products / services outside the country, all of whom are part of the IT service profile.

Figure no. 26 Main market for products / services provided by operators operating in the CCI
Source: Own processing of questionnaire replies, 2017
Market at local level
Market at national level
Market at international level
Market at regional level
Market at european level

Regarding the perception of market operators in the CCI sector, 37% of them consider that market supply has increased since the start of specific activities, and 36% consider supply to remain constant. The demand was estimated to have an upward trend of over half of respondents, and 22% reported a steady demand in the market. A drop in demand and / or supply was felt by less than 7% of respondents.

Figure no. 27 Types of investments made to develop activities in the CCI sector
Source: Own processing of questionnaire replies, 2017
Purchase of new equipment
Replacement of used equipment
Arranging workspace
Investments are to be accomplished
Insufficient financial resources for making investments
No investment required
No of answers

The main types of investments for CCI operators are the purchase of new equipment or the fitting out of workspaces. It is noted that some operators have made investments. Approximately 15% of respondents said they have not yet made investments to develop CCI-specific activities, but have planned this approach in the near future. From the perspective of accessing non-reimbursable funding sources, only 37% of respondents said they had implemented a project so far, while 45% of respondents would like to fund such a project.In this regard, particular attention should be paid to informing the economic environment and CCI operators about various calls for projects, given the relatively low rating given by respondents to the level of information on existing funding opportunities (average rating is 4, on a scale from 1 to 10 where 1 = very little information, 10 = very much information). According to the information gathered through interviews, the information needs of operators operating in the CCI sector are related to the possibilities of obtaining financial resources to support the business, the tax benefits that can be capitalized when starting a business or creating new jobs. Another subject of interest is represented by the opportunities for promotion and marketing of the business such as participation in fairs, exhibitions or cooperation projects.

At the level of the five counties analyzed, among the respondents to the questionnaire, there are very few active economic operators in the CCI sector involved in a partnership like associations / federations or groups of economic operators (6%), but most are open to the establishment and operationalization of cooperation relations with other companies and companies (almost 60%). The development of partner culture was also indicated in the interviews as a direction of interest, especially in the cross-border profile, given the technological context and the specific characteristics of the sector. However, to date there have been no significant steps in this direction. The development of the CCI sector could be supported by responding to interviews and by actively involving institutions and organizations representing the economic environment through:

- Constantly informing agents of legislative changes of interest, existing funding opportunities, existing tax incentives, etc. (eg by setting up one-stop-shops for informing the local economic environment).
- Organizing actions to promote products and services provided by local economic agents, including CCI specific products and services (fairs and exhibitions, festivals, cooperation projects, promotion of local brands, organization of competitions, etc.)
- Organize training courses for employees working in the CCI sector
- Facilitating the establishment of partnerships at local, county, cross-border level, etc. between interested economic operators (mediation of communication between parties, etc.).

3. The SWOT analysis

The above analysis reflects a fluctuating dynamic in the CCI sector in Mehedinţi, Dolj, Olt, Teleorman, Giurgiu. The overall picture of the evolution of this sector results, however, from the correlated analysis of the strengths and weaknesses identified and the development perspectives need to be aware of the existing opportunities and threats. The SWOT analysis is the tool used in this respect, as outlined below.

STRONG POINTS	WEAK POINTS
County Dolj made a significant contribution to the CCI sector in 2014, ranked the 8th at national level with a view to contributing to the number of firms, employees, and turnover for custom-made software development activities. The total number of active units registered in the CCI sector in the five counties analyzed increased by 16% in the period 2014-2016 (Olt County reported the best growth and Dolj County the largest number of units) The better performance of the five counties compared to the national average in relation to the evolution of the number of active local units performing artistic creation and production activities, namely video and music production activities, during 2014-2016 In Teleorman County, more than 95% of companies established in 2014-2016 operating in the CCI sector remained active in 2017. Increasing the number of active local units in the period 2014-2016 in the field of other scientific and technical activities (+83) and in the information technology services sector (+61) on the territory of the five counties. Significant increase of the average number of employees in the industrial sector of the CCI at	Development discrepancies of the county economic environment related to the CCI in the five counties targeted by the study (Dolj and Olt counties present a more developed CCI sector in terms of the number of active and employees units, respectively the average salary compared to the Mehedinţi, Teleorman and Giurgiu counties) Reducing the number of active local units falling under the NACE Code Rev. 2 18 (printing and reproduction of registrations), 58 (editing), 73 (advertising and market study) during 2014-2016 in the 5 counties In Giurgiu County, at the level of 2017, only 78% of the CCI sector companies set up in 2014-2016 High instability of the CCI economic environment in Mehedinţi County in the period 2014-2016 (90 created companies, 76 radiated companies) Reducing the average number of employees in the industrial companies of the CCI (NACE 18, 23, 32) during the period 2014-2016, in the counties of Teleorman and Olt Significant reduction of the average number of employees in the companies included in the NACE Rev. 2 M Professional, scientific and technical activities, in 2014-2016 in Mehedinţi

STRONG POINTS	WEAK POINTS
the level of Dolj and Giurgiu County in the period 2014-2016 Gender-balanced distribution of employees in the CCI sector considering local units active in the territory of the five counties The significant increase in the average number of employees and the average salary in the companies classified on the NACE Rev. 2 M Professional, scientific and technical activities, in the period 2014-2016 in Olt County (+ 40%, respectively + 62%) The significant increase of the average salary in the companies classified on the NACE Rev. 2 R Arts, entertainment and recreation in 2014-2016 in Dolj county (+ 68%). The significant increase of the average salary in the companies classified on the NACE Rev. 2 J. Information and Communication, in 2014-2016 in Olt County (+ 61%).	County (-24%) Significant reduction of the average number of employees in the companies included in the NACE Rev. 2 R Arts, entertainment and recreation in the period 2014-2016 in the counties of Teleorman and Mehedinti. In 2016, average wages for employees in the NACE Rev. 2 M (professional, scientific, technical) activities in the five counties were 30% lower compared to the national average. In 2016, average wages for employees in the NACE Rev. 2 J (information and communications) from the five counties were 50% lower compared to the national average. Poor degree of development of partnerships between economic agents in the CCI sector

OPORTUNITIES	THREATS
European Creative Industry Alliance (ECIA) Initiatives and the implementation of ECIA's relevant CCI sector policy agenda Implementation of the Creative Europe program 2014-2020, funded by EU funds, for cultural and creative actions Implementation of White Charter for activating the economic potential of cultural and creative sectors in Romania Formation of the Inter-ministerial Working Group to Support the CCI Sector at National Level Financing Opportunities for CCI Sector Entrepreneurs through the 2014-2020 Regional Operational Program, NRDP 2014-2020, Human Capital Operational Program 2014-2020 - Romania Start-Up Plus and Romania Start-Up Nation Program Cross-border cooperation initiatives to ensure knowledge transfer and promotion of the CCI sector	International competition and accessibility of products supplied by CCI coming from the foreign market (imports). At national level, no public policy or regulatory framework dedicated solely to capitalizing on the CCI sector has been defined Bucharest is acting as a polarizing center that employs more than half of the workforce in the CCI sector and produces about 70% of the total turnover of the CCI sector Unstable fiscal framework at national level The relocation of young people and labor force specialized in different urban centers at national or European level. The rigidity of the credit system and the insufficiency of facilities and support instruments to guarantee credits or other forms of financing to economic operators in the CCI sector The CCI sector is not approached in a unitary way from the point of view of collecting and publishing relevant statistical data

4. Assessment of the potential for the development of creative and cultural economic activities

In order to analyze the economic development potential, a forecast for the next 5 years of the evolution of the economic environment was made in terms of turnover and number of employees in the five counties (Mehedinţi, Dolj, Olt, Teleorman, Giurgiu) for one of the main NACE sections of the CCI Sector: J. Information and Communications[16].

Figure no. 28 Estimated Evolution of Turnover in **Figure no. 29 Estimated Evolution of the Number of**

Active Local Units - NACE Rev. 2 J - Information and Communication
Source: Own processing of statistical data provided by NIS, 2017

Employees in Active Local Units - NACE Rev. 2 J - Information and Communication
Source: Own processing of statistical data provided by NIS, 2017

The prospects for the evolution of the turnover and the number of employees were calculated on the basis of the trend, taking into account the statistical data provided by the NIS for the period 2008-2016. Thus, from the perspective of turnover, it is estimated that it will register growth in all counties analyzed. The most significant increase in relative terms could be recorded between 2018-2023 by Mehedinţi County (+ 144%), and in absolute terms by Dolj County (+400 million lei). Dolj County produces more than 60% of the cumulated turnover of the area of information and communication of the territory targeted by the study and employs over 70% of the employed population in this field. The development perspectives of the information and communication sector in Dolj County are supported by the functioning of the Faculty of Automation, Computers and Electronics at the University of Craiova (Dolj County), which annually supplies approximately 400 IT graduates, who can be easily fit into the labor market at the county level in the information and communication sector.

[16] There was no data available at the NIS level to perform a similar analysis

Although an increase in turnover is estimated in all counties analyzed, from the perspective of the number of employees, an increase is expected in the period 2018-2023 only in the county of Dolj. Thus, in the year 2023, Dolj county could employ more than 80% of the total number of employees in the information and communication field in the 5 counties, providing more than 1,500 additional jobs compared to 2016. The most important reductions in the number of employees Mehedinti (-24%) and Teleorman (-22%) counties are expected.

According to the above development perspectives, it is estimated that the Dolj County will become a polarizing center for the development of the information and communication industry in the period 2018-2023, representing the main production market for these services in the five analyzed counties Mehedinti, Dolj, Olt, Teleorman, Giurgiu).

In order to support the activity of economic agents active in the cultural and creative industries sector, there are a number of funding opportunities that can be accessed according to specific ideas and development needs. The main funding programs relevant to the ICI sector are presented in the table below:

Program title	Institution managing funding	What is funded	PerECntage of non-repayable funding	Website with specific information
Human Capital Operational Program 2014-2020 - Romania Start-up Plus	Ministry of Regional Development, Public Administration and European Funds	Developing entrepreneurship and setting up new businesses in the urban environment	100% (maximum 40.000 euros)	http://www.fonduri-ue.ro/pocu-2014
Romania Start-up Nation	Ministry for Business Environment, Commerce and Entrepreneurship	Stimulate the establishment and development of small and medium-sized enterprises and improve economic performance	100% (maximum 200.000 lei)	http://www.aippimm.ro/articol/programe/start-up-nation-2017/start-up-nation-2017/
National Rural Development Program - Sub-measure 6.2	Ministry of Agriculture and Rural Development	Establishment and development of micro-enterprises and small enterprises in the non-agricultural sector in rural areas	100% (maximum 70.000 euros)	www.afir.info
National Rural Development Program - Sub-	Ministry of Agriculture and Rural	Support for micro-enterprises and small rural enterprises that	90% (maximum 200.000 euros)	www.afir.info

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Measure 6.4	Development	create or develop non-agricultural activities in rural areas		
Regional Operational Program 2014-2020 - Investment Priority 2.1.	Ministry of Regional Development, Public Administration and European Funds	Strengthening the market position of SME in competitive areas identified in the National Competitiveness Strategy and Regional Development Plans	90% (maximum 200.000 euros)	http://www.inforegio.ro/ro/por-2014-2020/ghiduri-specifiEC-2014-2020.html
Program of the National Cultural Fund Administration	Administration of the National Cultural Fund	Funding of cultural programs, projects and actions organized in the country and / or abroad	Minimum 75%	https://www.afcn.ro/finantari/proiecte-culturale.html
Creative Europe	Executive Agency for Education, Audiovisual and Culture - European Commission	The European Commission's Framework Program to support the cultural and audiovisual sectors	Variable depending on the selected project call	https://eaECa.ec.europa.eu/creative-europe/funding_en

In addition, the PREIMM Program can be mentioned through which SME have access to investment credits under very advantageous financial conditions for beneficiaries.[17]

[17] http://www.aippimm.ro/articol/preimm/programul-rom-no---elve-ian-pentru-imm-uri-preimm—2

The development perspectives of the CCI sector in the counties of Mehedinţi, Dolj, Olt, Giurgiu and Teleorman were also analyzed in the field research through specific questions included in the questionnaires applied to the economic agents participating in the survey. The main issues investigated related to the estimated evolution over the next 3 years of the activities carried out by the CCI respondents, the potential complementary activities that could be developed in the future and the elements that determine the sucECss of a fudge business of activities under the cultural and creative industries.

Figure no. 30 Evolution of activities in the CCI sector over the next 3 years
Source: Own processing of the response to the questionnaire, 2017
The activity will be maintained at the current level

The activity will be developed through additional investment and staffing
Activity will be stopped or replaced
The activity will be complemented by other services / products specific to the creative industry
I cannot appreciate it

There is a certain degree of uncertainty among economic operators over the maintenance of CCI specific activities over the next 3 years, with 32% of respondents saying they can not estimate the future evolution of economic activities. On the other hand, 40% of respondents believe that the activity will develop by supplementing existing jobs, making investments and / or extending to new areas of activity related to the CCI.

A quarter of respondents believe that activity will remain at the current level and only 3% want to abandon their specific CCI activities.

Figure no. 31 Potential investment areas for expanding CCI activities
Source: Own processing of the response to the questionnaire, 2017

The most interesting field of activity in terms of making new investments is considered to be IT, i.e. the making of software products, computer games or web portals. In the second position, the photographic activities and specialized visual design are at a short distance.

Manufacture of toys, jewelery, musical instruments, ceramic products is not a sector of interest for future investments for economic operators questioned.

Figure no. 32 Elements that ensure the success of starting an activity in the CCI sector
Source: Own processing of the response to the questionnaire, 2017
Using own resources and managing them efficiently
Patience, perseverance and ensuring effective risk management
Making investments in product marketing and performing equipment
Performing an analysis of the respective market of existing supply and demand
Paying attention to the skills of the involved staff

The most important factor in ensuring the success of a business in the CCI sector is the entrepreneur's desire to succeed, through patience, perseverance, and a constant analysis of the risks and problems encountered in order to identify and apply the right solutions. Other elements contributing to the stabilization of the market position are the use, at least in the first instanEC, of their own financial resources (without resorting to different forms of loan) and the analysis of the evolution of the relevant market in terms of consumer demand and competition.

Analyzing the prospects for the evolution of the economic context, the opportunities for financial support of economic operators operating in the CCI sector and the possible evolution of these activities at the level of the individual economic operators from the 5 analyzed counties can be selected the activities of the CCI that seem to have the best chanECs for sustainable development and correlated with the specific local business environment. These are presented below, in order of relevanEC:

1. Publishing and / or realization of software products / computer games / web portals
2. Specialized photographic and / or visual design activities
3. Cinematographic, video and / or television production and / or distribution activities
4. Audio production and / or distribution activities and musical editing activities

5. Conclusions

The economic environment at European level has not yet reached the level of development in the period before the economic crisis in 2008, with economic agents being constantly seeking solutions that will enable them to stabilize and prosper in an increasingly competitive market. Policy promoters addressing the economic environment have identified innovation as a key element for sustainable growth, and the cultural and creative industries sector embraces this concept in most of its specific activities. In this context, the CCI is perceived by all levels of governance, especially at European level, as one of the pillars of competitive growth that needs to be supported and promoted through direct action and measures.
The analysis of the CCI sector at the level of Mehedinţi, Dolj, Olt, Teleorman and Giurgiu counties led to the following specific conclusions:

- Dolj county is a focus area of CCI sector activities, especially for IT services; Dolj County also has the potential to become a polarizing center for the development of the information and communication industry in the next 5 years, both in terms of production and the number of employees
- There is a tendency to reorient economic agents towards the establishment of companies operating in the CCI sector within the five counties (the average variation in the number of local units active in the CCI sector in the five counties was better than the one recorded at national level during the period 2014-2016)
- The local units active in the CCI sector develop their activity and create new jobs, especially at the level of the counties Dolj, Olt and Giurgiu; in the counties of Teleorman and Mehedinti the number of jobs in the CCI sector is decreasing.

- The salaries of employees working in the CCI sector are increasing in all counties, especially at the level of Olt County, but they remain at least 30% lower than the national average (in the information and communications sector they are 50% lower than the national average
- The survival rate of newly established companies operating in the CCI sector is high in Teleorman County and is low in Mehedinţi and Giurgiu counties, which indicates the existence of a competitive economic environment or a local market for insufficient sales in Mehedinţi and Giurgiu counties and a potential development that can be capitalized at the level of Teleorman County.
- Artistic creation and production activities, namely video and music production, have discovered a sustained development in the last five years in the five counties, the performance of the analyzed territory being better than the national average compared to the number of local units active in these economic areas.
- The partnership culture is insufficiently developed at the level of the CCI sector in the five counties analyzed, but the economic operators have a positive attitude towards the potential cooperation between the societies provided they have information and an appropriate framework of activity in this respect.

The evolution of recent years, both from the perspective of applied sectoral policies and the performance of the economic environment, has increasingly highlighted the opportunities and favorable growth conditions for the cultural and creative industries sector.

By encouraging and adequately informing economic operators about financing, promotion and cooperation opportunities, including in the context of cross-border projects, the territories of Mehedinţi, Dolj, Olt, Teleorman and Giurgiu counties can make a significant contribution to increasing the competitiveness of the cultural and creative industries sector, in the national and European context.