

European
Cultural
and Creative
Industries
Alliance

European Cultural and Creative Industries Alliance

The European Cultural and Creative Industries Alliance (ECCIA) is composed of the five national European luxury goods and creative industries organizations:

Collectively the ECCIA and the national member organisations represent the interests of over 300 European luxury & creative businesses and cultural institutions.

Circulo Fortuny | SPAIN



Comité Colbert | FRANCE



Fondazione Altagamma | ITALY



Meisterkreis | GERMANY



Walpole British Luxury | UK



Representatives from each national
organisation sit on the Executive
Team of ECCIA including

ITALY

Armando Branchini

Fondazione Altagamma

President of the Executive Team



SPAIN

Almudena Arpón de Mendivil

Circulo Fortuny

Member of the Executive Team



FRANCE

Elisabeth Ponsolle des Portes

Comité Colbert

Member of the Executive Team



GERMANY

Clemens Pflanz

Meisterkreis

Member of the Executive Team



UK

Julia Carrick

Walpole British Luxury

Member of the Executive Team



LVMH

Paloma Castro Martinez

LVMH Corporate Affairs

Member of the Executive Team



The work of ECCIA falls into three main areas of activities:

**→ PROTECTION OF INTELLECTUAL PROPERTY
RIGHTS AND GOVERNANCE OF THE INTERNET**

→ MARKET ACCESS & TOURISM

**→ HIGHLIGHTING THE ROLE OF THE CULTURAL
AND CREATIVE INDUSTRIES AS A KEY DRIVER
OF EUROPE OVERALL ECONOMIC HEALTH,
COMPETITIVENESS, INNOVATION AND
EMPLOYMENT**

The study commissioned by ECCIA, carried out by Frontier Economics and presented on June 5 at the European Parliament has revealed the importance of the cultural and creative industry as a key driver for European jobs and competitiveness

The luxury market
has recorded **double digit**
in the last **growth**
two years.

The output of the
sector in 2010

is estimated to be

over **€440 billion**,
approximately 3%
of European GDP.

The sector employs approximately
1 million workers directly,
and at least a
further **500,000**
workers indirectly.

Europe dominates
the global **luxury market.**
Collectively, **European brands**
account for over 70%
of the global luxury
goods market.

Total
exports for the luxury market
are approximately **€260 billion** in 2010,
representing **over 10%**
of all exports from Europe.

The sector contributes over €110 billion to the exchequer.

Medium term forecasts
will continue to suggest the luxury sector
to grow at between 7%
9% and 7%
per year

ECCIA in 2012

→ ECCIA is the official voice of 1,5 million jobs in the European high-end industries, that build on

- Aura of luxury
- Selective Distribution
- Intellectual Property
- Strong exports
- Creativity and craftsmanship

→ The EU considers our business model as growth driver for Europe with presence worldwide

→ The EU is considering governance of the internet, visa facilitation, market access, and fight against counterfeiting as a competitiveness factor

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN
PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL
COMMITTEE AND THE COMMITTEE OF THE REGIONS

Promoting cultural and creative sectors for growth and jobs in the EU

1. A LARGELY UNTAPPED RESOURCE FOR THE EU 2020 STRATEGY

At the heart of our social fabric, culture shapes our identities, aspirations and relations to others and the world. It also shapes the places and landscapes where we live, the lifestyles we develop. Heritage, visual and performing arts, cinema, music, publishing, fashion or design manifest themselves strongly in daily life but the contribution that cultural and creative sectors¹ can bring to social and economic development in the EU is still not fully recognised. Furthermore, major challenges are brought about by globalisation and the digital shift but the necessary adaptations are yet to be promoted to allow these sectors to realise their full potential and Europe's long-standing excellence to be better valorised as a comparative advantage on the world scene. This Communication proposes a strategy to exploit further the potential of these sectors in the EU to contribute to growth and jobs.

High growth sectors

The economic performance of the cultural and creative sectors is recognised: in the EU they account for 3.3% of GDP and employ 6.7 million people (3 % of total employment)².

Figures are also important if one considers the fashion³ and high-end⁴ industries, which rely on a strong cultural and creative input. They account for 3% of the EU GDP each and employ respectively 5 and 1 million people, with employment in the high-end industries expected to reach 2 million by 2020⁵.

Between 2008 and 2011, employment in the cultural and creative sectors proved more resilient than in the EU economy as a whole⁶ with growth rates varying however between sub-sectors. This tendency is all the more interesting because some sectors have a higher percentage of youth employment than the rest of the economy.

¹ Covering in particular architecture, archives and libraries, artistic crafts, audio-visual (including film, television, video games and multimedia), cultural heritage, design (including fashion design), festivals, music, performing and visual arts, publishing and radio

² 2010 European Competitiveness Report. Other sources have estimated it higher at 4.5% of GDP and 8.5 million people employed (TERA Consultants, 2010).

³ Including design, manufacturing of fashion materials and goods, and their distribution

⁴ Covering in particular high-end fashion, jewellery and watches, accessories, leather goods, perfumes and cosmetics, furniture and household appliances, cars, boats, as well as gastronomy, hotels and leisure

⁵ Competitiveness of the EU fashion industries, Idea Consult, 2012; The value of the cultural and creative industries to the European economy, Frontier Economics, 2012

⁶ Source: Eurostat (EU-LFS)



EUROPEAN COMMISSION

Brussels, 26.9.2012
SWD(2012) 286 final

COMMISSION STAFF WORKING DOCUMENT
COMPETITIVENESS OF THE EUROPEAN HIGH-END INDUSTRIES

On September 26th, the European Commission adopted its

Communication on Cultural and Creative sectors, in which it

→ defines our sector as relying on culture and creativity

→ recognises our horizontal high-end business model vs vertical sectors

→ recognises the strategic importance of our sector as growth driver

On October 10th, the European Commission adopted its

Communication on Industrial Policy, in which it:

→ Recognises that **cultural and creative industries** are important drivers of economic and social innovation

In the same package, the Commission also adopted two staff working papers: one on the competitiveness of the fashion sector and one on the competitiveness of the high-end sector.

In the high-end paper, the Commission outlines the fundamentals of our business model, our economic importance, our challenges and related policy needs, and concludes that

"Considering the significant impact of the high-end industries on the Eu economy and their contribution to EU employment and innovation, it is important to ensure that adequate policies are in place at EU level that take into account the high-end business model and help the sector to continue to grow and create jobs".

Commitment for 2013

→ Build on EU recognition to highlight strategic role of the sector for national economies

→ Ensuring correct framework conditions for further steady development of our industry (IP / Free Trade / Visa facilitation / Internet Governance)

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