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Transnational status quo report of creative industry (ceramics and related areas)

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Content

1. Introduction

According to the [Green paper – Unlocking the potential of cultural and creative industries] (European Commission, 2010): "Cultural industries are those industries producing and distributing goods or services which at the time they are developed are considered to have a specific attribute, use or purpose which embodies or conveys cultural expressions, irrespective of the commercial value they may have. Besides the traditional arts sectors (performing arts, visual arts, cultural heritage – including the public sector), they include film, DVD and video, television and radio, video games, new media, music, books and press. This concept is defined in relation to cultural expressions in the context of the 2005 UNESCO Convention on the protection and promotion of the diversity of cultural expressions. Creative industries are such industries, which use culture as an input and have a cultural dimension, although their outputs are mainly functional. They include architecture and design, which integrate creative elements into wider processes, as well as subsectors such as graphic design, fashion design or advertising."

„With revenues of €535.9b, the creative and cultural industries (CCIs) contribute to 4.2% of Europe's GDP. The sector is its third-largest employer, after construction, food and beverage service activities, such as bars and restaurants. More than 7m Europeans are directly or indirectly employed in creative and cultural activities — 3.3% of the EU's active population. Performing arts (1,234,500), visual arts (1,231,500) and music (1,168,000) employ more than 1m people each, followed by advertising (818,000), books (646,000) and film (641,000)." (EY, 2014)

Ceramic and porcelain sector is part of creative and cultural industries, especially in its designing and small-scale production. In some regions, this sector is part of regional cultural heritage. Thus, we are providing desk research information about both ceramic and design sector in this analysis. Some CerDee project partners (museums) are naturally part of cultural industry.

1.1. Current situation in Austria

Austria had its Creative Industries Strategy for Austria (The creative industries – a key economic factor and driving force for Austria as a place of innovation) developed already in 2016. Federal Ministry of Science, Research and Economy (BMWFW) in co-operation with Kreativwirtschaft Austria (KAT) and other stakeholders developed it.

Table 1 CCIs in Austria (2013)

	Enterprises	Total of jobholders	Employed persons	Turnover in million Euros	Gross value added at factor in mil. Euro
All CCI's	41 900	149 670	106 280	21 360	8 660

Source: SME Research Austria, Statistics Austria, 2016 (based on data from 2013) in Creative Industries Strategy for Austria

Within the above-mentioned strategy ceramic or porcelain are not mentioned directly, design on the other is. Instruments mentioned in the strategy are though in line with the ideas and planned actions of the project CerDee.

In the field of ceramics, Austria is famous for Vienna porcelain, which was made in Austria at the Vienna factory between 1719 and 1864. Traditionally many producers of porcelain and ceramics existed in Austria, Lilienporzellan from Wilhelmsburg and Gmunden Ceramics Manufactory are some of them.

Detailed information can be found in country report Austria available at: https://www.interreg-central.eu/Content.Node/2020-08-31-Status-quo-country-report-Austria-final-v1.pdf

1.2. Current situation in Czechia

"The estimates concerning the participation of the sector of creative industries in the economy are conducted by a lot of organizations. According to calculations of the European Commission the sector of cultural industries and creative industries in countries as, among others, Poland, the Czech Republic, Hungary or Slovakia produces on average 2% GDP altogether." (PROMAN, 2016)

In 2012, CCI's contributed to 1.49 % of the Czech Republic's GDP. (Žáková, Bednář et al., 2015a). In the same year worked in CCI's about 162 thousand workers. (Žáková, Bednář et al., 2015b). It was 3.19 % of total workforce (economically active population) of the Czech Republic. (ČSÚ, 2012)

Detailed information can be found in country report Czechia available at: https://www.interreg-central.eu/Content.Node/2020-08-31-Status-quo-country-report-Czechia-final-v1.pdf

1.3. Current situation in Germany

According to Federal Ministry for Economic Affairs and Energy (BMWi) (2018) contributed CCIs in 2017, CCI's contribute to 3.1 % of Germany's GDP. In the same year, approximately 7.7% of all companies operated in CCI's. In Bavaria, which is the seat of the CerDee Lead Partner creative and culture industries gave work to 4.3 % of workforce and it contributed to GDP with 3.6 % in 2018 according to Bayerisches Staatsministerium für Wirtschaft, Landesentwicklung und Energie (2020).

In the field of ceramic sector, Germany is known, for example, for art pottery, which is typical of the western part of this country. In Bavaria and Saxony, porcelain production has been an important part of economy since the end of 19th century. However, this sector is declining from year to year.

Detailed information can be found in country report Germany available at: https://www.interreg-central.eu/Content.Node/2020-08-31-Status-quo-country-report-Germany-final-v1.pdf

1.4. Current situation in Italy

The most exact and recent data collected on the creative industries in Italy refer to 2018. They testify a growing Italian situation both for the economic value brought by these industries, 96 billion Euros, and equal to about 16% of the "internal product", and for the number of people involved 1.55 million workers (6% of Italian workers). The Italian present situation shows a great development of the creative industries, in particular the sector linked to ceramics and design, mainly in the regions of northern Italy including Emilia Romagna (Lombardy in first place).

The cultural and creative industry of the Emilia-Romagna Region is showing signs of good results: in 2018, the sector is worth more than 7 billion and employs 80 thousand people.

An extremely important element for the development of the creative industries, which has to be taken into account, is the MULTIPLICATOR equal to 1.77: it means that for one Euro of value produced by one of the activities in this segment, another 1.77 on average is activated on the rest of the economy. Faenza was able to verify this richness brought by the cultural system, through a specific study carried out on Argillà 2018. The event dedicated to ceramic art and handicraft, has brought a gain not only on ceramists and artists, but also on the tourist and entrepreneurial activities of the territory, in fact multiplying every Euro spent on culture.

Detailed information can be found in country report Italy available at: https://www.interreg-central.eu/Content.Node/2020-08-31-Status-quo-country-report-Italy-final-v1.pdf

1.5. Current situation in Poland

"The estimates concerning the participation of the sector of creative industries in the economy are conducted by a lot of organizations. According to calculations of the European Commission the sector of cultural industries and creative industries in countries as, among others, Poland, the Czech Republic, Hungary or Slovakia produces on average 2% GDP altogether." (PROMAN, 2016)

"Polish pottery is fascinating in its decorations that are based upon traditional design motifs that are hundreds of years old. This specialty pottery is made in only one location in the world, namely the area around the small historic town of Boleslawiec (pronounced Bol-e-swa-vee-ec), Poland which was first settled in 1202. The town is located in southwestern Poland just 50 miles from the border with Germany. Boleslawiec has been a centre for ceramics for over 200 years and many of the pottery shops have been in the same family for generations. When you acquire today's Polish pottery, you are also getting a unique piece of history and Old World heritage." (Polish Pottery, n.d.)

Detailed information can be found in country report Poland available at: https://www.interreg-central.eu/Content.Node/2020-08-31-Status-quo-country-report-Poland-final-v1.pdf

1.6. Current situation in Slovenia

Hojnik and Rebernic (2014) argue that in Slovenia up to 7 % of active workforce works in creative and cultural industries. Within the Interreg Europe project CRE:HUB (https://www.interregeurope.eu/crehub/) a Roadmap: Culture and Creative Industry Strategy in Slovenia has been suggested - https://www.interregeurope.eu/fileadmin/user_upload/tx_tevprojects/library/file_1513869646.pdf. Regional Development Agency of the Ljubljana Urban Region developed an Action plan for development of CCIs in its region - https://www.interregeurope.eu/crehub/news/news-article/8044/action-plan-ljubljana-urban-region/.

Detailed information can be found in country report Slovenia available at: https://www.interreg-central.eu/Content.Node/2020-08-31-Status-quo-country-report-Slovenia--final-v1.pdf

This report is structured into chapters, where chapter 2 describes the methodology; chapter 3 provides an analysis of the sector based on the secondary data and outputs of our own stakeholder desk research analysis. Chapter 4 uses the primary data from the survey and informs about the results. Chapter 5 summarizes the highlights and defines strengths and weaknesses of the ceramic sector. At first, each of these chapters describes its particular aspects in all CerDee countries separately. Second part includes summary of all CerDee countries together.

2. Methodology

This Transnational report was created based on the information and data from Country reports of Austria, Czechia, Germany, Italy, Poland and Slovenia. These reports were fused together and contained data were compared across this Transnational report.

The first decisive step was to analyse current situation of ceramic and design sector in all CerDee countries. This information gave us an overview how the ceramic industry works on country level and how to make exact suggestions to boost entrepreneurial and creative skills to optimize the economic performance, competitiveness and market position of the creative players.

Second step was to work out situational analysis based on secondary data gained from Eurostat statistics. This analysis focuses on indicators such as Number of enterprises, Production value, Persons employed, Employees and Persons employed per enterprise. The data shows the sector of “Manufacture of other porcelain and ceramic products” (NACE C234), which consists of manufacturing ceramic for household and ornamental articles (NACE C2341), manufacturing ceramic sanitary fixtures (NACE C2342), manufacturing ceramic insulators and insulating fittings (NACE C2343), manufacturing other technical ceramic products (NACE C2344), and manufacturing other technical ceramic products (NACE C2349). Following part shows the status and development of Design sector in CerDee countries (NACE M741 - Specialized design activities). However, it is necessary to mention that not only the designers for ceramics and porcelain industry are included in following statistics.

The third step consisted of classification stakeholder sectors in ceramic industry that took part in our research. We defined five sectors such as Private sector, Professional associations, Educational sector, Cultural institutions, Public and public private sector.

The fourth step includes collecting and analysing primary data from responses of stakeholders from interviews and questionnaires. This chapter shows the answers on several questions describing the entrepreneurial capacities, students as potential future entrepreneurs, expectations and needs of stakeholders and marketing activities.

Based on the questions for enterprises we were able to work out an analysis of entrepreneurial capacities and needs for their successful business development (e.g. education, marketing/sales skills, entrepreneurial skills, technology knowledge).

Questions for enterprises were focused on:

- a situation of ceramic sector within the whole creative sector in your country;
- general trend in terms of the ceramic sector/market size;
- the cooperation between private and public sector and other institutions;
- a membership in an association or organization;

- the history of their business;
- position and stability of their business;
- a cooperation with educational institutions;
- employee (self) training;
- further education and training;
- a need of an international portal about history of ceramics;
- marketing activities of the overall craft development in the city/region/country;
- financial situation of their business;
- subsidies use.

Students as a part of educational sector play a big role in the future of ceramic industry as a whole. Their opinion gives an overview of current situation of educational sector and the most important strengths and weaknesses of the system.

Questions for students were focused on:

- their study direction;
- what are they intending to do after you finish school university;
- lack in knowledge/skills you might be facing during your work life;
- knowledge/skills they gained at school/university;
- what would help them with starting their own business / finding an appropriate job.

Analysis of expectations and needs of each stakeholder sector is based mainly on the method of benchmarking. Acquired data from respondent's answers were mainly sort out by different criteria such as intensity and importance of current cooperation with other stakeholder sector and influence level of each stakeholder sector. Given overview may show the opportunities how to connect all stakeholders from ceramic sector.

The last part of primary data analysis involves analysing the knowledge of marketing that entrepreneurs have and how do they use marketing to achieve goals of the organization in an effective way.

The fifth step to make Transnational report decisive involves studying analysed data and classifying it either as a strength or as weakness to make an overview of a ceramic industry as a whole on country level using gained data.

3. Ceramic and design – secondary data overview

The situational analyses were worked out using the Eurostat statistical data on a country levels. First, the Manufacture of porcelain and ceramic products is described. Second, design sector in particular CerDee country is introduced. However, it is necessary to mention that not only the designers for ceramics and porcelain industry are included in following statistics.

Note: For Italy, it is very difficult to have national correct data. For example in Emilia Romagna there are about 170 ceramic producers (part of Confindustria ceramic association) but other are free from associations. Then there are about 140 handicraft enterprises (in Faenza 35 workshops). Other data show up to 3500 enterprises. Eurostat shows other numbers.

3.1. Manufacture of porcelain and ceramic products

In this part of the report, we will describe each of the CerDee countries with secondary data overview. We will focus on the information about number of enterprises, production value, persons employed, employees and persons employed per enterprise. These pieces of information can give an overall overview of the sector in all CerDee countries. There will be summary of these results, at the end of each subchapter.

3.1.1. Number of enterprises

This subchapter gives an overview of secondary data focusing on number of enterprises in manufacture of porcelain and ceramic products. Each of CerDee countries will be described separately.

Table 2 Number of enterprises

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
Austria	153	146	148	156	153	142	137	144	132
Czechia	1 482	1 449	1 392	1 295	1 282	1 257	1 231	1 178	1 180
Germany	780	771	763	760	958	883	723	823	818
European Union	:	13 745	13 400	13 237	13 677	13 142	13 300	13 147	13 764
Italy	2 812	2 696	2 528	2 416	2 284	2 242	2 226	2 198	:
Poland	531	504	476	499	490	513	522	552	697
Slovenia	47	51	50	65	56	58	53	51	53

Source: Eurostat

Austria

There is the second lowest number of enterprises in the industry of Manufacturing porcelain and ceramic products in Austria in comparison with CerDee countries. The number of enterprises decreased from 153 enterprises (2010) to 132 enterprises (2018). In 2017, the biggest portion of businesses operates in manufacturing ceramic for household and ornamental articles (114), followed by other ceramic products (25).

Czechia

There is the second highest number of enterprises in the industry of Manufacturing porcelain and ceramic products in Czechia in comparison with CerDee countries. However, the number of enterprises decreased from 1,482 enterprises (2010) to 1,180 enterprises (2018). In 2017, the biggest portion of businesses operates in manufacturing ceramic for household and ornamental articles (983), other ceramic products (167) and other technical ceramic products (16).

Germany

The number of enterprises in the industry of Manufacturing porcelain and ceramic products reached the peak in 2014 (958 enterprises) in Germany. The number of enterprises increased significantly between 2013 and 2014 from 760 enterprises to 958 enterprises, but dropped again significantly in next two years to 723 in 2016. In 2017, the biggest portion of businesses operates in manufacturing ceramic for household and ornamental articles (552), followed by enterprises manufacturing other ceramic products (124), and other technical ceramic products (77).

Italy

There is highest number of enterprises in the industry of Manufacturing porcelain and ceramic products in Italy in comparison with CerDee countries. However, the number of enterprises has been decreasing year by year from 2010. In 2017, the biggest portion of businesses operates in manufacturing ceramic for household and ornamental articles (1,757), followed by enterprises manufacturing ceramic sanitary fixtures (204), other technical ceramic products (35), and ceramic insulators and insulating fittings (7). In comparison with other CerDee countries, the contribution of Italy to the whole industry is significant.

Poland

The number of enterprises in the industry of Manufacturing porcelain and ceramic products increases since 2014 in Poland. Generally, the number of enterprises increased from 531 enterprises (2010) to 697 enterprises (2018). In 2017, the biggest portion of businesses operates in manufacturing ceramic for household and ornamental articles (443), followed by enterprises manufacturing other ceramic products (55), other technical ceramic products (32), ceramic sanitary fixtures (19), and ceramic insulators and insulating fittings (13).

Slovenia

There is lowest number of enterprises in the industry of Manufacturing porcelain and ceramic products in Slovenia in comparison with CerDee countries. The peak was reached in 2013. In 2014, the development shows the decrease of the enterprise number. There were 42 enterprises manufacturing ceramic for household and ornamental articles in 2013, but 36 in 2014. Only 1 enterprise manufacturing ceramic sanitary fixtures was registered in 2014 and no has been registered since 2015. In comparison with other CerDee countries, the contribution of Slovenia to the whole industry is insignificant.

3.1.2. Production value

This subchapter gives an overview of secondary data focusing on production value in manufacture of porcelain and ceramic products. Each of CerDee countries will be described separately.

Table 3 Production value (million EUR)

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
Austria	199.1	195.2	187.1	126.0	210.0	184.6	173.2	185.4	168.5
Czechia	182.9	196.7	201.2	197.6	188.7	198.2	203.4	218.3	227.8
Germany	2 276.7	2 383.5	2 324.0	2 325.4	2 588.9	2 509.5	2 481.6	2 509.2	2 599.3
European Union	:	8 196	8 000	7 694	9 030	8 490	8 609	8 476	8 866
Italy	1 135.5	1 243.1	1 053.4	987.4	1 066.7	901.3	1 029.1	998.9	1 014.8
Poland	612.1	635.8	614.6	626.1	747.9	823.7	904.7	959.7	1 014.7
Slovenia	6.5	7.8	7.9	4.0	1.9	2.0	2.4	3.8	4.4

Source: Eurostat

Austria

The production value decreased from 199.1 million EUR (2010) to 168.5 million EUR (2018). However, the production value development from 2010 to 2018 is quite instable in Austria; in 2013, the indicator fell from 187.1 million EUR to 126.0 million EUR.

Czechia

In spite of decreasing number of enterprises, the production value raised from 182.9 million EUR (2010) up to 227.8 million EUR (2018) in Czechia. On the other hand, the indicator of production value fluctuated around the similar number between 2010 and 2016; from 2017, the development of production value seems to rise every year.

Germany

The production value rose from 2.2767 billion EUR up to 2.5993 billion EUR between years 2010 and 2018. The indicator shows the highest values in Germany in comparison to other CerDee countries. From 2016, it seems that production value has only rising tendencies in observed years.

Italy

The production value reaches yearly about 1 billion EUR in Italy, but the indicator shows noticeable fall in 2012. Since then production value is fluctuating around 1 billion EUR every year. On top of that, it shows rising tendencies from 2017 through observed years.

Poland

The production value rose rapidly from 614.4 million EUR (2010) up to 1.0147 billion EUR (2018) in Poland. Between years, 2010 and 2013 the indicator fluctuated around similar value, but the development of the production value shows permanent rise since 2013.

Slovenia

The production value reached 7.9 million EUR in 2012, but dropped dramatically in 2013 (4.0 million EUR) and 2014 (1.9 million EUR). In spite of constant rise since 2014, the contribution of Slovenia to the whole ceramic industry is insignificant

3.1.3. Persons employed

This subchapter gives an overview of secondary data focusing on persons employed in manufacture of porcelain and ceramic products. Each of CerDee countries will be described separately.

Table 4 Persons employed

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
Austria	1 480	1 490	1 493	1 215	1 556	1 579	1 496	1 503	1 378
Czechia	5 855	5 660	5 740	5 656	5 630	5 719	5 733	5 647	5 560
Germany	20 874	21 264	21 344	21 333	22 208	21 386	20 803	21 696	21 955
European Union	:	109 144	107 345	105 000	106 763	106 050	105 352	106 785	:
Italy	14 699	14 219	13 471	12 836	11 711	11 166	11 091	10 629	10 671
Poland	12 394	11 669	11 565	11 639	11 762	12 154	12 158	13 285	14 442
Slovenia	296	371	372	175	98	109	92	154	161

Source: Eurostat

Austria

The Persons employed indicator shows quite constant development, with the drop in 2013 (1,215) and peak in 2015 (1,579). In 2017, the biggest portion of persons was employed in manufacturing ceramic for household and ornamental articles (348), and other ceramic products (167).

Czechia

The Persons employed indicator shows quite constant development, with the peak in 2012 (5,740). In 2017, the biggest portion of persons was employed in manufacturing ceramic for household and ornamental articles (3,042), followed by other technical ceramic products (394), and other ceramic products (172).

Germany

The number of Persons employed reached the peak in 2014. In 2017, the biggest portion of persons is employed in manufacturing ceramic for household and ornamental articles (9,607), followed by other technical ceramic products (5,817), other ceramic products (2,666).

Italy

The Persons employed indicator has been decreasing year by year from 2010, except 2018, when there was slight increase. In 2018, the biggest portion of persons are employed in manufacturing ceramic for household and ornamental articles (5,487), followed by enterprises manufacturing ceramic sanitary fixtures (4,063), other technical ceramic products (346), and ceramic insulators and insulating fittings (53).

Poland

The Persons employed has been increasing since 2012. In 2017, the biggest portion of persons are employed in manufacturing ceramic for household and ornamental articles (5,942), followed by enterprises manufacturing ceramic sanitary fixtures (2,971), other ceramic products (341).

Slovenia

The Persons employed indicator reached 372 in 2012 but dropped dramatically in 2013 (175) and 2014 (98). The persons employed in manufactures of ceramic for household and ornamental articles drops from 134 in 2012 to 85 in 2013 and of manufactures of other technical ceramic products from 224 in 2012 to 72 in 2013. In comparison with other CerDee countries, the contribution of Slovenia to the whole industry is insignificant.

3.1.4. Employees

This subchapter gives an overview of secondary data focusing on number of employees in manufacture of porcelain and ceramic products. Each of CerDee countries will be described separately.

Table 5 Employees

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
Austria	1 338	1 355	1 350	1 064	1 407	1 441	1 364	1 364	:
Czechia	4 891	4 705	4 769	4 782	4 737	4 845	4 865	4 771	:
Germany	20 165	20 670	20 600	20 647	21 263	20 536	20 126	20 922	:
European Union	:	98 058	96 506	94 800	95 101	95 155	94 011	95 296	:
Italy	11 087	10 970	10 396	9 874	8 915	8 415	8 368	7 959	:
Poland	11 784	11 169	11 110	11 155	11 313	11 661	11 690	12 786	:
Slovenia	267	339	342	124	53	64	51	115	:

Source: Eurostat

Austria

The number of employees goes hand in hand with Persons employed indicator with the drop in 2013 (1,064) and peak in 2015 (1,441). In 2017, the biggest portion of employees worked in enterprises manufacturing ceramic for household and ornamental articles (233), followed by other ceramic products (144).

Czechia

The number of employees' indicator shows quite constant development, with the peak in 2010 (4,891). In 2017, the biggest portion of employees worked in enterprises manufacturing ceramic for household and ornamental articles (2,328), followed by other technical ceramic products (369), and other ceramic products (62).

Germany

The number of employee's indicator shows quite constant development between 2010 and 2017. In 2017, the biggest portion of employees worked in enterprises manufacturing ceramic for household and ornamental articles (9,039), followed by enterprises manufacturing other technical ceramic products (5,779), and other ceramic products (2,543).

Italy

The number of employees' indicator has been decreasing year by year from 2010. In 2017, the biggest portion of employees, differently from persons employed, work in manufacturing ceramic sanitary fixtures (3,836), followed by enterprises manufacturing ceramic for household and ornamental articles (3,313), other technical ceramic products (318), and ceramic insulators and insulating fittings (47).

Poland

The number of employees' indicator shows quite constant development between 2010 and 2016, but with significant increase in 2017. In 2017, the biggest portion of employees worked in enterprises manufacturing ceramic for household and ornamental articles (5,558), followed by enterprises manufacturing ceramic sanitary fixtures (2,956), and other ceramic products (285).

Slovenia

The number of employees develops hand in hand with the persons employed. The number of employees reached the peak of 342 in 2012, but dropped dramatically in 2013 (124) and 2014 (53). The number of employees in manufactures of ceramic for household and ornamental articles drops from 112 in 2012 to 51 in 2013 and of manufactures of other technical ceramic products from 223 in 2012 to 70 in 2013. In comparison with other CerDee countries, the contribution of Slovenia to the whole industry is insignificant.

3.1.5. Persons employed per enterprises

This subchapter gives an overview of secondary data focusing on persons employed per enterprise in manufacture of porcelain and ceramic products. Each of CerDee countries will be described separately.

Table 6 Persons employed per enterprise

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
Austria	9.7	10.2	10.1	7.8	10.2	11.1	10.9	10.4	:
Czechia	4.0	3.9	4.1	4.4	4.4	4.5	4.7	4.8	:
Germany	26.8	27.6	28.0	28.1	23.2	24.2	28.8	26.4	:
European Union	:	7.9	:	8.0	7.8	8.1	:	8.1	:
Italy	5.2	5.3	5.3	5.3	5.1	5.0	5.0	4.8	:
Poland	23.3	23.2	24.3	23.3	24.0	23.7	23.3	24.1	:
Slovenia	6.3	7.3	7.4	2.7	1.8	1.9	1.7	3.0	:

Source: Eurostat

Austria

The average number of persons employed per 1 enterprise is 10.4 in 2017. There was a significant decrease of this indicator; it reached the value of 7.8 persons per 1 enterprise. Since 2013 there has not been such significant decrease again, but between 2015 and 2017 the value of the average number of persons employed per one enterprise was constantly decreasing.

Czechia

The average number of persons employed per 1 enterprise is 4.8 in 2017. The development shows slight increase from 3.9 (2011) to 4.8 (2017), but the indicator shows constant development through observed years.

Germany

The average number of persons employed per one enterprise is 26.4 in 2017. The development shows constant development of this indicator between 2010 and 2017. Table shows slight decrease of the indicator in 2014 and 2015, but since 2016 its value reached even higher value than before.

Italy

The average number of persons employed per one enterprise is 4.8 in 2017. The development shows slight decrease from 5.3 (2013) to 4.8 (2017). It reached the peak in 2011 and held the same value for next 2 years. It shows mentioned decrease since 2014.

Poland

The average number of persons employed per one enterprise is 24.1 in 2017. The development shows constant development of this indicator between 2010 and 2017. It reached the peak in 2012 but it shows there was not significant decrease through observed years.

Slovenia

The average number of persons employed per 1 enterprise is 3.0 in 2017. The development shows significant drop from 7.4 (2012) to 2.7 (2013). The indicator reached the peak in 2012 and since that it didn’t reached values from previous years.

3.1.6. Manufacture of porcelain and ceramic products in all CerDee countries - secondary data overview

There are a highest number of enterprises in Italy (2,198). There is a significant difference in country with the second highest number of enterprises, which is Czechia (1,180). Only Germany has similar number of enterprises (818), but indicators value is even smaller in other CerDee countries, such as Poland (697), Austria (132) and Slovenia (53).

The production value is the highest in Germany, followed by Italy and Poland. However, the production value in Germany is more than two times higher than in Italy or Poland. The indicator of production value in Poland increases constantly, while there is no permanent growth in Italy. Moreover, the production value in Poland is created by 552 enterprises, while by 2 198 in Italy. The production value in Czechia is comparable with Austria. However, the production value development from 2010 to 2018 is quite instable in Austria. The production value in Austria is created by 132 enterprises, while by 1,180 in Czechia. In comparison with other CerDee countries, the contribution of Slovenia to the whole industry is insignificant.

There is the highest number of persons employed in Germany (21,955). The second highest number of persons employed is in Poland (14,442) which can be compared with Italy (10,671). There is a significant difference in persons employed between Italy and Czechia (5,560), and other CerDee countries such as Austria (1,378) and Slovenia (161) seem to have not that significant influence on the overall value of this indicator in ceramic industry.

Data of number of employees are missing in all CerDee countries, but in 2017, the highest number of employees was also highest in Germany (20,922). The second highest number of employees was in Poland (12,786), which can be compared with Italy (7,959). There is also a significant difference in this indicator's value in Czechia (4,771) compared to Italy. It seems that other CerDee countries such as Austria (1,364) and Slovenia (115) have not that significant influence on the indicator's value in ceramic industry.

The average number of persons employed per one enterprise in Germany (26.4) is comparable with Poland (24.1) in 2017. It shows that bigger enterprises operate in manufacturing ceramics and porcelain in these countries in comparison with other CerDee countries. There is a significant difference in the indicator's value for Austria (10.4). On the other hand, the average number of persons employed per 1 enterprise in Italy is the same as in Czechia (4.8) and slightly lower in Slovenia (3.0). It shows that relatively small enterprises operate in manufacturing ceramics and porcelain in Italy, Czechia and Slovenia.

3.2. Specialized design activities

Following part shows the status and development of Design sector in CerDee countries (NACE M741 - Specialised design activities). However, it is necessary to mention that not only the designers for ceramics and porcelain industry are included in following statistics. Therefore, the results have to be considered as an overview of the whole sector of specialised design activities. There will be summary of these results at the end of the subchapter.

3.2.1. Number of enterprises

This subchapter gives an overview of secondary data focusing on number of enterprises in specialized design activities. Each of CerDee countries will be described separately.

Table 7 Number of enterprises

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
European Union	:	143 954	157 342	164 307	176 777	179 757	192 446	207 719	:
Czechia	2 118	2 160	2 256	2 261	2 353	2 399	2 530	2 727	:
Germany	16 732	18 398	20 464	21 530	23 083	26 170	26 307	30 079	:
Italy	27 612	27 481	28 408	27 450	29 065	29 201	30 828	32 277	:
Austria	1 398	1 484	1 507	1 540	1 542	1 558	1 594	1 631	:
Poland	3 641	5 450	6 184	6 899	7 768	8 635	10 005	11 204	:
Slovenia	733	815	869	1 001	1 100	1 249	1 374	1 502	:

Source: Eurostat

Austria

The number of enterprises in design sector has been rising constantly since 2010. In 2017, there were 1,631 enterprises on the Austrian market.

Czechia

The number of enterprises in design sector has been rising constantly since 2010. In 2017, there were 2,727 enterprises on the Czech market.

Germany

The number of enterprises in design sector has been rising rapidly from 16,732 (2010) up to 30,079 (2017). In comparison with other CerDee countries, the growth of number of enterprises is quite significant in the last decade,

Italy

The number of enterprises in design sector has been rising constantly since 2013. In 2017, there were 32,277 enterprises on the Italian market, which is the highest number from CerDee countries. It is comparable with Germany (30,079).

Poland

The number of enterprises in design sector has been rising rapidly from 3,641 (2010) up to 11, 204 (2017). The growth of number of enterprises in Poland is the most significant in the last decade from all CerDee countries.

Slovenia

The number of enterprises in design sector has been rising constantly since 2010. In 2017, there were 1,502 enterprises on the Slovenian market, which is the lowest number from CerDee countries.

3.2.2. Production value

This subchapter gives an overview of secondary data focusing on production value in specialized design activities. Each of CerDee countries will be described separately.

Table 8 Production value (million EUR)

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
European Union	:	17 739	19 164	19 816	21 380	23 863	22 959	24 368	:
Czechia	81.0	87.5	86.8	81.0	76.4	91.0	104.9	126.7	:
Germany	1 930.1	2 209.0	2 522.4	2 838.9	2 825.6	3 028.6	3 277.3	3 703.8	:
Italy	3 703.2	3 838.4	3 696.7	3 894.8	4 271.5	4 363.4	3 913.2	3 880.7	:
Austria	109.2	124.4	130.8	133.8	133.9	:	:	:	:
Poland	148.2	279.5	281.8	425.9	390.5	416.5	431.4	441.2	:
Slovenia	29.3	31.6	33.2	34.3	38.9	47.3	53.8	61.3	:

Source: Eurostat

Austria

The production value in design sector reached 133.9 million EUR in 2014. The data from 2015 to 2018 is not available, but the available data shows the constant rise of indicator of production value.

Czechia

In 2017, the production value of Czech market in design sector was 126.7 million and it reached the peak in the same year. The data form 2018 is not available, but the available data shows that the production value has been rising constantly since 2014.

Germany

The production value in design sector reached the peak in 2017. In 2017, the production value of German market in design sector was 3.7038 billion EUR, and it reached the peak in the same year. Data from 2018 is missing, but available data shows that the indicator has been rising constantly since 2010.

Italy

The production value in design sector reached the peak in 2015, but it has been decreasing since that time. In 2017, the production value of Italian market in design sector was 3.8807 billion EUR, which is the highest number from CerDee countries.

Poland

The production value in design sector of Polish market in design sector was 441.2 million in 2017 when it reached the peak. Available data shows it has been rising since 2014.

Slovenia

The production value in design sector has been rising constantly since 2010. In 2017, the production value of Slovenian market in design sector was 61.3 million EUR, which is the lowest number from CerDee countries.

3.2.3. Persons employed

This subchapter gives an overview of secondary data focusing on persons employed in specialized design activities. Each of CerDee countries will be described separately.

Table 9 Persons employed

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
European Union	:	213 551	234 291	239 533	261 727	269 542	293 800	310 798	332 846
Czechia	:	2 065	2 194	2 191	2 264	2 397	2 537	2 783	3 011
Germany	31 261	33 340	37 151	40 226	43 505	48 842	51 402	58 222	60 712
Italy	44 857	43 682	44 723	44 790	46 526	47 216	49 292	50 273	51 687
Austria	2 183	2 318	2 393	2 460	2 511	:	:	:	2 945
Poland	5 206	8 755	9 450	10 145	11 756	13 990	15 344	17 616	20 410
Slovenia	889	973	1 064	1 182	1 286	1 462	1 590	1 752	1 928

Source: Eurostat

Austria

The number of persons employed in design sector has been rising constantly since 2010 (the data 2015 – 2017 is missing). In 2018, there were 2,945 persons employed in design sector in Austria and the indicator also reached the peak in the same year.

Czechia

The number of persons employed in design sector has been rising constantly since 2013. In 2018, there were 3,011 persons employed in design sector in Czechia and it reached the peak in the same year.

Germany

The number of persons employed in design sector has been rising rapidly from 31,261 (2010) up to 60,712 (2018), which is the highest number of persons employed in design sector in CerDee countries.

Italy

The number of persons employed in design sector has been rising constantly since 2010. In 2018, there were 51,687 persons employed in design sector in Italy, which is the second highest number from CerDee countries.

Poland

The number of persons employed in design sector has been rising rapidly from 5,206 (2010) up to 20,410 (2018). The growth of persons employed in Poland was the most significant from all CerDee countries in the last decade.

Slovenia

The number of persons employed in design sector has been rising constantly since 2010. In 2018, there were 1.928 persons employed in design sector in Slovenia, which is the lowest number from CerDee countries.

3.2.4. Employees

This subchapter gives an overview of secondary data focusing on number of employees in specialized design activities. Each of CerDee countries will be described separately.

Table 10 Employees

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
European Union	:	103 000	115 190	117 791	131 775	137 727	155 980	162 331	:
Czechia	678	633	676	658	677	736	781	894	:
Germany	13 103	13 336	15 042	16 959	18 566	20 563	22 610	25 738	:
Italy	14 026	12 573	14 734	15 773	16 172	16 806	17 471	17 363	:
Austria	762	815	843	859	921	:	:	:	:
Poland	1 447	2 836	3 075	2 993	3 685	4 764	4 756	5 797	:
Slovenia	325	334	379	361	369	409	430	466	:

Source: Eurostat

Austria

The number of employees in design sector has been rising constantly between 2010 and 2014 (the data 2015 – 2018 is missing). In 2014, there were 921 employees in design sector in Austria and it reached the peak in the same year.

Czechia

The number of employees in design sector has been rising constantly since 2013. In 2017, there were 894 employees in design sector in Czechia and it reached the peak in the same year.

Germany

The number of employees in design sector has been rising rapidly from 13,103 (2010) up to 25,738 (2017), which is the highest number of employees in design sector in CerDee countries.

Italy

The number of employees in design sector is the second highest from CerDee countries. In 2017, there were 17,363 employees in design sector in Italy, but it reached the peak in 2016 (17,471 employees).

Poland

The number of employees in design sector has been rising rapidly from 1,447 (2010) up to 5,797 (2017). In comparison with other CerDee Countries, the growth of employees in Poland is the most significant in the last decade.

Slovenia

The number of employees in design sector has been rising constantly since 2010. In 2017, there were 466 employees in design sector in Slovenia, which is the lowest number from CerDee countries.

3.2.5. Persons employed per enterprise

This subchapter gives an overview of secondary data focusing on persons employed per enterprise in specialized design activities. Each of CerDee countries will be described separately.

Table 11 Persons employed per enterprise

GEO/TIME	2010	2011	2012	2013	2014	2015	2016	2017	2018
European Union	:	1.5	1.5	1.5	1.5	1.5	1.5	1.5	:
Czechia	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	:
Germany	1.9	1.8	1.8	1.9	1.9	1.9	2.0	1.9	:
Italy	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.6	:
Austria	1.6	1.6	1.6	1.6	1.6	:	:	:	:
Poland	1.4	1.6	1.5	1.5	1.5	1.6	1.5	1.6	:
Slovenia	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	:

Source: Eurostat

Austria

The average number of persons employed per 1 enterprise was 1.6 in 2014 (the data 2015 – 2018 is missing). The development shows no changes of this indicator between 2010 and 2014.

Czechia

The average number of persons employed per 1 enterprise is 1.0 in 2017. The development shows no changes of this indicator between 2010 and 2017. The average number of persons employed per 1 enterprise is the lowest in Czechia (1.0), which indicates mainly self-employed designers.

Germany

The average number of persons employed per 1 enterprise is 1.9 in 2017, which is the highest in CerDee countries. The indicator shows stable value through observed years.

Italy

The average number of persons employed per 1 enterprise is 1.6 in 2017. The development shows no changes of this indicator between 2010 and 2017.

Poland

The average number of persons employed per 1 enterprise is 1.6 in 2017, which is the same as in Italy. The indicator shows stable value through observed years.

Slovenia

The average number of persons employed per one enterprise is 1.2 in 2017. The development shows no changes of this indicator between 2010 and 2017. The average number of persons employed per one enterprise is the second lowest in Slovenia in comparison with other CerDee countries. It shows that mainly small enterprises and self-employed designers operate in design sector in Slovenia.

3.2.6. Specialized design activities in all CerDee countries – secondary data overview

The data from 2018 are missing, but in 2017 the highest number of enterprises in design sector was in Italy (32,277) which can be compared to Germany (30,079).On the other hand, the sector development is rapid in Germany in comparison to Italy. The third highest number of enterprises is in Poland (11,204), which experienced the most significant growth of the number of enterprises from all CerDee countries. It seems that the rest of CerDee countries have not that significant impact of number of enterprises Czechia (2,727), Austria (1,631) and Slovenia (1,502). On the other hand, the value of this indicator has been rising constantly since 2010 in all CerDee countries except Italy.

In 2017, the highest production values are registered in Italy (3.8807 billon EUR), the second highest in Germany (3.7038 billion EUR). These two countries generate the highest production value from CerDee countries. The third highest production value was generated by Polish design sector (441.2 million EUR). It seems that the production value of other CerDee countries such as Austria (133.9 million EUR), Czechia (126.7 million EUR) and Slovenia (61.3 million EUR) is not that significant.

The highest number of persons employed in design sector was registered in Germany (60,712), the second highest in Italy (51,687). The third highest number of persons employed in design sector is in Poland (20,410) where the growth of persons employed in was the most significant from all CerDee countries in the last decade. There was 3,011persons employed in Czechia in 2018, which is comparable with Austria (2,945) and in the same year there were 1.928 persons employed in design sector in Slovenia, which is the lowest number from CerDee countries.

The highest numbers of employees in design sector are registered in Germany (25,738), the second highest in Italy (17,363) in 2017. The third highest number of employees is in Poland (5,797), where the growth of employees is the most significant from all CerDee countries in the last decade. There were 921 employees in Austria in 2014, which is comparable with the number of employees in Czechia (894) in 2017. In 2017, there were 466 employees in design sector in Slovenia, which is the lowest number from CerDee countries.

The average number of persons employed per one enterprise is the highest in Germany (1.9), the second highest is in Italy (1.6), Austria (1.6) and Poland (1.6). The average number of persons employed per one enterprise is the lowest in Slovenia (1.2) and Czechia (1.0), which indicates mainly self-employed designers.

3.3. Basic information about stakeholders in ceramic sector – Assesment of the CerDee partners

Austria

Within the CerDee project, we will predominantly target the area of Lower Austria. Figure 1 shows a typical example of Austrian porcelain from the Lilienporzellan factory in Wilhelmsburg. The factory was shut down in late 90´s of 20th century, but the production was moved to Czech Republic. Moreover, this is typical example for bigger production plants in Austria.

Figure 1 Daisy series from Lilienporzellan

Source: http://www.lilienporzellan.net/

Czechia

The ceramic and porcelain sector in the Czech Republic is part of traditional industry. The sector of porcelain production developed later than in Germany. First production place was in Horní Slavkov in Karlovy Vary region, which is a traditional porcelain region. From this place, the production developed to other places in Northwest Bohemia. Pottery is wide spread in the country and it is favourite hobby of many people.

Figure 2 Example of porcelain production in Karlovy Vary region

Source: https://www.kudyznudy.cz/aktivity/prohlidky-porcelanky-thun-nova-role

Germany

Within INTERREG Central Europe area following federal states are involved: Baden-Wuerttemberg, Bavaria, Berlin, Brandenburg, Mecklenburg-Western Pomerania, Saxony, Saxony-Anhalt and Thuringia. Rosenthal GmbH is one of the bigger companies in ceramic sector in Germany. Company’s product range includes everything from simple utility ceramics to high-class porcelain objects.

Italy

Faenza ceramic system has managed to combine different skills that interact with each other: art, technology, industrial research processes, design, handicraft and marketing. A union of intent under the keyword "ceramics", developed by an educational system (Institute of ceramic Ballardini) that for many years supported the training of hundreds of operators of ceramics, technicians, curators, artists and national managers.

Figure 3 Typical product of Faenza region - Majolica

Source: https://ceramicsanditsdimensions.eu/glossary/faenza/

Poland

Main production of ceramic sector in Poland is mainly concentrated to the Boleslawiec region. There are another three Polish regions, which play an important role in the European porcelain market: Wałbrzych/Jaworzyna Śląska, Ćmielów, and Chodzież/Łubiana. Bolesławiec is the largest production centre of ceramic production in the country with four big and several small producers of artistic, hand-made ceramic tableware and decorative articles. Their main assets are local clay deposits and unique form of decoration recognizable across the world.

Figure 4 Example of ceramics of Bolesławiec

Source: https://www.polish-pottery.pl/

Slovenia

There are no medium or big companies in ceramic industry in Slovenia. In general, most of employees in the ceramic sector are individual self-employed ceramists, artists, designers that run their own business and work in their studios or homes.

Figure 5 Typical product of Slovenian ceramics *Majolika* (Wine Jug)

Photo: Tomaž Lauko

3.3.1. Private sector

Austria

Rosemarie Benedikt is the most experienced ceramist in the field. She has been in the business for 60 years now and is still exhibiting in markets. **Martina Zwölfer** is a renowned ceramist with international working experience. She works in an artistic and experimental way, but also designs product series. She is head of the ceramics department at the University of Applied Arts Vienna. **Helene Kirchmair** and **Beate Gatschelhofer** took part in the Keramiksymposium 2018 in Gmunden. Their work can be described as experimental and sculptural. Beate also experiments with 3D-printing technology.

The tile manufactory **Karak** is internationally recognized for their contemporary and high-quality raku tiles combined with graphic design elements. They give ceramics an innovative and modern status in Austria. Sandra Haischberger with her company **feinedinge*** produces and sells her ceramic design objects in a wonderful shop in the centre of Vienna. She also displays her work at renowned design fairs like Maison & Objet. **Hermann Seiser** is a passionated craftsmen who produces series for designers and artists, as well as for big companies like d'arbo and McDonalds. Besides the production of commissions, Hermann Seiser also gives courses at the NDU and the art school in Vienna, as well as group courses in his own atelier. **Lena Bauernberger** produces and sells her objects in her own shop and showcases them at renowned fairs and events like the Milan Design Week. **Josef Wieser** describes himself as a „Naturlehmkeramiker" (natural clay ceramist). He fires his locally collected and wheel-thrown objects in his hand built kiln and doesn't even have an own computer. Some design studios have discovered ceramics as their material of choice and therefore work together with experienced craftsmen in this field. The design studio Lucy.D for example is cooperating with Beate Seckauer of **Neuzeughammer Porzellanmanufaktur**. The results are then presented at renowned events like the Milan Design Week and contribute to a new appreciation of ceramics in the area of interior design. They also work with new technologies and expand the range of action of ceramic design. **Hermann Seiser** also works together with internationally renowned Austrian artists and designers who appreciate his expertise. As far as young talents in the ceramic sector are concerned, **Hannah Seifert, Sandra Holzer, Fabian Grünstäudl, Erik Haugsby** and **Klemen Trupej** should be mentioned. They also use social media as a tool for their businesses.

Czechia

Porcelain production in the Czech Republic is divided into few relatively big producers in Karlovy Region and Dubí (Ústecký region). Those medium to big companies are accompanied with few smaller producer, which usually cover niche markets. Further there is big amount of potters (one other important region is South Bohemia with centre in Bechyně), usually self-employed all over Czech Republic. Some of them are running their workshops not as their main work activity. We can find also quite few design studios regularly working with ceramic/porcelain. Therefore, within the industry we can find a mixture of small and big companies, CCIs and producers. Not so common are co-working spaces etc. There are also some productions or decorating workshops for international companies and we can find specialised companies, e.g. profiling themselves in decorating. In general, the sector of bigger producers is in fierce competition with producers in other countries. Of course, we can find also producers of sanitary ceramics/porcelain or manufacturers of paving, tiling, roofing and other brick products, but those are out of our focus, even though they create quite a lot of production within the entire sector.

Germany

In almost all cases, the stakeholders are working alone (in some cases couples run a workshop together). Besides that, there are very few very small companies with less than ten employees. There are just handful bigger companies, such as Rosenthal GmbH, bhs tabletop AG with some hundred employees, and a few small size companies with 25 to 49 employees. The product range includes everything from simple utility ceramics (earthenware crockery) to high-class porcelain objects (tableware, art objects) including all possible fields of usage such as tiled stoves, roof tiles, floor tiles, bathroom furniture such as sinks, decorative objects for all purpose, jewellery, and tableware of all kind.

Most of the one-(wo)men-workshops offer different types of workshops to the public to generate an additional income. The offers range from pottery courses, to teaching of decoration techniques, to special firing methods. These offers are mostly meant for everybody interested in the topic.

Italy

In Emilia Romagna, there is the highest density of industries dedicated to the ceramic sector in all of Italy. There are industries of tiles, building materials, sanitary ware and production of decorative and design elements. The craft sector sees the presence of about **140 workshops**, 40 of them are in Ravenna province, **35 in Faenza** (the number is susceptible to changes due to the closure of historic shops. In some cases, they see generational changes within families). All these companies are flanked by plant producing materials for ceramics, such as plaster, different kinds of clay, glazes and so on. These companies have different “souls” from an administrative point of view. We start from **big plant** involving many workers and among them the creative operators, such as the designer play a fundamental role. There are **family-run businesses**, with only one owner or with several family members, in these companies, the roles are often interchangeable and the skills have been acquired in ceramic institutes or specific ceramic courses. There are many **workshops** with owners possessing a VAT certification; in some cases, the VAT number has a minimum register (few earnings, few taxes). There are **studio potteries** where the production is artistic or design. The presence of these private operators is very important in Faenza and in general, in Emilia Romagna, all of them represent the Italian ceramic sector.

Poland

There are over 6,500 one-man/partnership businesses and 57 legal entities registered in Poland that declare the production of ceramic tableware and decorative articles to be their dominant area of activity.

Bolesławiec area is the largest ceramics production centre in the country with four big and several small producers of artistic, hand-made ceramic tableware and decorative articles. Their main assets are local clay deposits and unique form of decoration recognizable across the world. Most of the production is exported to the USA, South Korea, Germany and other countries. As there are many producers outside the Boleslawiec region, who offer similar pottery, local firms have taken steps to register and protect this type of pottery as a regional product.

After some crisis in the 2000s, the sector is doing quite well now. One of the key problems is a deficit of labour resources, only partly mitigated by Ukrainian migrants.

Slovenia

In the private sector of Slovenia, most of ceramists are self-employed or they have their business registered as a complementary activity beside their main occupation/job (supplementary-work). As part of private sector in Slovenia, a special type of legal form also exists, that is called "self-employed in culture". The artists get this status based on their results/art works and their active integration in the field of culture. The government (Ministry of Culture) supports them with exemption from taxes, but their annual income cannot exceed 20.000 Euro. In our research, we found so far 17 ceramists for our database that have this type of legal form and support from the government.

3.3.2. Market/trade information and professional associations

Austria

The **Keramikforum** is an association for Styrian ceramists. Some Austrian ceramists are members of international associations like **International Academy of Ceramics (IAC)**. There are some societies like the "Verein zur Förderung europäischer Keramikkünstler", led by Eva Fürtbauer and the "Verein Freunde der Wilhelmsburger Keramik", that aim to support regional and European ceramic artists or the survival of collections or private museums.

Ceramists meet each other at the renowned markets in Gmunden (**Töpfermarkt**, organized by Eva Fürtbauer) and Vienna (**Pots&Blitz**). Furthermore, the **Keramiksymposium in Gmunden** takes place every 3 years. Participants from all over the world explore the material in a new context to create innovative concepts and objects.

Czechia

The producers (esp. bigger once) are members of the Asociace sklářského a keramického průmyslu České republiky (Association of glass and ceramic industry in the Czech Republic), the number of members is by 45. There is also an Association of ceramic artists (Sdružení výtvarných umělců – keramiků). General support for businesses and entrepreneurs give regional branches of the Chamber of Commerce of the Czech Republic and other development agencies. There is also few locally or regionally acting fellowships of ceramic artists and producers (e.g. association Keramikum)

Germany

As soon as somebody had officially registered as commercial enterprise with the tax office a membership of the Chamber of Commerce becomes obligatory in Germany. If a craft profession is the basis of the enterprise the chambers of crafts/trades is the responsible institution. The membership is subjected to a fee.

There are 53 chambers of crafts/trades in Germany representing the whole craftsmanship/trade in Germany. They are organised in different regional chambers and are self-governing institutions of the German crafts/trades. They represent the interests of the sector. They develop strategies to promote the sector, monitor, and report on the situation of their members. In case of any problems, occurring between their members and customers or other authorities the Chambers assumes the role of a mediator. Besides, they offer further trainings and give advice related to any business issues, inclusive legal advices. They provide special support for new businesses and entrepreneurs. In cooperation with the guilds, they organise job/craft/trade specific educational trainings.

There are some other associations such as DKG (German Ceramic Society), Bundesverband der keramischen Industrie (BVKI, Federal Association of the Ceramic Industry), Verband der keramischen Industrie (VKI, Association of the Ceramic Industry). The first one (DKG) was founded in 1919 as technical-scientific association of the entire ceramic sector in Germany. While at the beginning all ceramic areas were represented in DKG, it has developed over the years to a society representing in first place technical ceramics and the research field of it. Members of the VKI are in first place bigger companies, only very few small to medium sized companies are members (f. e. Wagner & Apel). VKI supports its members in first place on a political level (Environmental- and Energy policy, safety issues, legal issues), and together with DKG is working on scientific research and development.

Crafts ceramists can become a member of the ceramics **guilds**. Each Federal State of Germany has its own “potters” guild. The guilds offer to their member’s information about new developments related to any new legal principles and regulations, such as minimum wage, declaration of conformity, data protection law, etc., they promote the members on their websites, offer them the free participation at different pottery markets and organise the “Day of the open pottery” which is held once a year. Besides, they offer information about the education as trained craftsperson in ceramics and monitor content and quality of the education. In some regions, they examine the journeymen and master craftsmen and support them then to set up their own business.

Italy

In Faenza, there are different professional associations, with different roles. **Confartigianato** and **CNA** for the ceramic sector, represent an important support for the ceramic companies, the workshops and the studios, in all phases of their activity: from the development of the business, idea to the establishment, from financing to the operational start-up, from the management of administrative requirements to the implementation of technologies and market positioning. In particular, artisans, self-employed and small businesses find in these associations of category a help to have relations with public and national institutions. In Faenza, the **Ente Ceramica** has successfully carried out important activities including legal protection, promotion and education in art ceramics through the organization of exhibitions, events, initiatives and the production of catalogues and other publications.

Poland

We have identified two associations of individual ceramists; each of them has around 50 members. They operate on a regional scale and focus on organising exhibitions, presentations and workshops.

There is one industry organisation - it brings together almost 30 producers of ceramics from Boleslawiec region. Its aim is to protect the quality and reputation of Bolesławiec pottery but its activity is rather symbolic.

Slovenia

Most professionals in ceramic field in Slovenia are involved in the market by selling their products by themselves on art markets, fairs, through their websites and e-shop (Etsy) or on costumer’s demand. They also sell through other channels (e.g. small stores with unique products, gift shops). Some of them are also members of professional associations that we included in our database. We found six active associations in Slovenia for ceramists and potters. They are also active in organize exhibitions and to promote ceramics on the market.

3.3.3. Educational sector and training info

Austria

The **Fachschule Stoob** is the last school in Austria where ceramics can be learned from the start. The ceramic institute at the **University of Applied Arts in Vienna** is open for students of all other institutes, but does not offer a complete educational course anymore. The remaining courses are focusing on ceramic art. Other universities in Austria offer specialized courses for ceramic art, like the **Ortweinschule in Graz** („Keramik Art Craft“) and the **Kunstuniversität Linz** where you can study „Sculptural Conceptions / Ceramics“. Another possibility to learn the ceramic craft is dual education – an apprenticeship at a ceramic manufactory in combination with attending the vocational school located in Graz.

A quite new phenomenon in Austrian ceramic culture are co-working spaces like **„rami-ceramics“**, **„potteria“** and **„keramik tonhalle“**. They all offer courses for various ceramic techniques (for beginners and advanced ceramists as well) and it is possible to rent a studio place there with different abo options. In addition, the **Volkshochschule** offers courses for special techniques. Such approaches are actually highlighted in the Creative Industries Strategy for Austria.

The Ceramic School is an online portal, which was founded by Joshua Collinson to inspire, connect and teach ceramic and business techniques. The ceramic school provides ceramic courses online to the masses, from all around the world to fellow enthusiasts everywhere.

Czechia

The educational sector is actually comparatively well developed in the Czech Republic. There are 5 university studios directly dealing with ceramic/porcelain and its design and also other focused on design in the Czech Republic. On the secondary level of education we have indicated over 10 school connected to ceramic/porcelain production or design. Well known are secondary schools in Karlovy Vary and Bechyně (South Bohemia). Some of the educational institutions focus more on art and design, other focus on production processes (esp. on secondary level). Ceramic production is popular hobby among the population, so there are courses for children (and other target groups) in almost every bigger town. On the other hand, some secondary schools often face decrease of demand. This fact also applies to universities, the main reason is the low employment of graduates in the field, and existing producers only need skilled apprentices.

Germany

There are only two stakeholders active in the educational sector in the German project areas – Keramikschule Landshut and Staatliches Berufliches Schulzentrum für Produktdesign und Prüftechnik Selb. The latter only provides very few courses dedicated to ceramics. The focus today is design in general. Whether ceramics is a topic depends on the teachers and their focus and interest. The Keramikschule Landshut educates ceramics as a craftsmanship. They train ceramic journeymen and offer to achieve the ceramic masters’ craftsman’s certificate/diploma.

Some universities in Germany (Burg Giebichenstein, KHB), offer courses in ceramics. In most cases, the focus is design, in some it is art. Ceramics as a material is always one choice among others. There is no university course/education dedicated solemn to ceramics or ceramics & glass, as it is in other countries.

Italy

The educational system for ceramists in Emilia Romagna, and in particular in Faenza represents a good base for students who are oriented to the design, ceramic handicrafts and ceramic technology. The "**Institute for Ceramic art and design** Ballardini", in Faenza is a high school that allows the access to the University. The **ISIA University** in Faenza has a specific course for ceramic design. The **IFTS - Technical course for ceramic entrepreneurs** is arranged by a provincial institution, in collaboration with Emilia Romagna region. **The ITS** – high level technician for developing ceramic design, offers competences and technical-professional skills. In addition to these possibilities, the **University in Bologna** offers courses for Art and design Curators, Fine Art teachers and operators, the **Emilia Romagna region** arranges courses offers professional training courses, often in agreement with ceramic companies.

Poland

The only higher education institution with a separate faculty of ceramics is the Academy of Fine Arts in Wrocław. They offer courses in ceramics design craft. The Artistic University in Poznań also has a well-equipped ceramics atelier but this is just one of several ateliers prepared for students of sculpture. The AGH Academy in Krakow offers engineer courses in basic ceramic technologies and materials. Many universities offer courses in general design, without a focus on ceramics. There is only one artistic secondary school in Poland that teaches ceramics. Last year a vocational class for ceramics decorators was re-established in Boleslawiec. However, the school lacks the necessary equipment; few students are interested in this profession, while the local manufacturers are not interested in cooperation with the school.

Slovenia

The educational system for ceramists in Slovenia is rather poor. There are two high schools where the students can partly learn about ceramic design. One is High School of design in Ljubljana and the second one is in Maribor. One of their optional school programs is Design of usable objects – where part of the program is dedicated to ceramics.

There is only one educational program on the university level called the Academy of Fine Arts and Design (Department of industrial and unique design – glass and ceramic design), but they accept only few students per year. That means that we have approximately 25 students in undergraduate and postgraduate studies of ceramics in total. The students can also learn ceramic design on two Faculties of Education in Ljubljana and Maribor, but only as a part of other main study program, so the studies are not based only on ceramics. The Faculty of Ljubljana registers 25 students per year and in Maribor only 20 students per year. Here we have to point out the problem of interviewing 150 students for the research analysis, as we do not have the required number of students in ceramic design in Slovenia in total.

3.3.4. Cultural institutions

Austria

The most important collection of ceramic objects can be found in the MAK (**Museum of Applied Arts in Vienna**). Its curator, **Dr. Rainald Franz**, is a well know art historian who also implemented the online catalogue of ceramics.

The **Geschirrmuseum in Wilhelmsburg** tries to implement the former factory location into the museum concept. The concept is a very sustainable one: Its own hydropower plant runs the museum, and it tries to preserve and pass on knowledge

Czechia

Ceramic or porcelain is part of many exhibitions in museums or galleries. Pottery has been part of the society for very long time, so some fragments of such product we can find in most regional museum exhibitions, esp. in the (former) production places. Most important collections are in the Uměleckoprůmyslové museum (The Museum of Decorative Arts in Prague) – part of its collection is exhibited in Klášterec nad Ohří, in the Museum of West Bohemia, Museum of Karlovy Vary, and Gallery of Karlovy Vary and Alšova gallery in Bechyně. A quality collection is also available at the Regional Museum in Teplice. Some of those collections are of course bound to the educational institutions in the region.

Germany

There are two kinds of cultural institutions dedicated to ceramics in the German partner regions. In most cases these institutions are museums. There are five museum dedicated to the (regional) history of ceramics (International Museum of Ceramics in Weiden, Museum of Porcelain Factory Wagner & Apel in Lippelsdorf, Porzellanwelten Leuchtenburg in Seitenroda, Porcelain Museum Oscar Schlegelmilch in Langewiesen, Porzellanikon in Selb and Hohenberg a. d. Eger). There are many museums with an own porcelain collection especially in Thuringia. Besides the exhibitions, itself these museums offer different educational programmes for several target groups (e.g. artist talks, thematic talks, pottery in historic styles, porcelain manufactory).

Besides two touristic routes (Porzellanstraße International, Thüringer Porzellanstraße) summarise the cultural history of the porcelain production in the two German partner regions. Members of the routes are in first place the ceramic manufacturers, which have different touristic offers to promote the ceramic regions.

Italy

The Italian association of Town of ceramic tradition AICC, gives a wide idea of the quantity of ceramic museums and institutions are active in Italy. In the northern part of Italy (CERDEE area), beside the International Museum of Ceramics in Faenza, partner of CERDEE, there are ceramics Museums in all the regions (Albissola, Savona, Fiorano, Laveno Mombello, Lodi, Castellamonte, Mondovì, Bassano del Grappa, Este, and Nove). In Faenza, there are also private museums such as Museo Tramonti, Museo Zauli and Museo Gatti, which have been found over the heritage of important artists. The cultural associations have established collaboration with the MIC, such as the FACC – Faenza Art Ceramic Centre that is also collaborating in CERDEE.

Poland

Ceramics as a hobby is quite popular in Poland. Almost in every larger town, a public cultural institution offers afternoon classes in ceramics. In Bolesławiec, there are three institutions that promote ceramics: International Centre for Ceramics (workshops, exhibitions, Ceramics and Sculpture Symposium, Festival of Ceramics), Museum of Ceramics (exhibition, workshops, and documentation), and Youth Culture Centre (workshops). Local producers (access to materials, expertise, workplaces etc.) somehow support all of them. In 4 years, the Museum of Ceramics will move to new premises and open the so-called Old Pottery - a reconstructed pottery workshop - that will serve as an educational centre.

Slovenia

In Slovenia, there are no museums or art galleries dedicated only to ceramic. The cultural institution with the largest ceramics collection is the National Museum of Slovenia. Our specialized ceramic collection contains ceramic objects dating form baroque until the end of 20th Century and a smaller collection of contemporary ceramics. For the database, we have also selected some regional museums, which have smaller but important collections of ceramics or as in case of the Slovene Ethnographic Museum, their own pottery studio, where they provide many workshops and other ceramic related activities.

3.3.5. Public and public-private acting sector

Austria

Unfortunately, there was not any information found about the public and public-private acting sector within the Desk research Austria, because whole sector experienced crisis due to **COVID-19 pandemic**.

Czechia

On the regional level belongs Karlovy Vary region to the ones, which supports traditional industries – glass and porcelain production, even though that this sector is not anymore as important for the local economy as in the past. Still the regional ecosystem consists of most important stakeholders (education, tourism and spa, producers, events etc.), but its interconnections seems to be weaker. Logically some municipalities (and not only in West Bohemia) try to support the traditional products and their production and they work with the heritage connected to it (e.g. Klášterec nad Ohří, Dubí, Loket).

Karlovy Vary region through its Karlovy Vary Business Development Agency runs a Platform of Traditional Industry, where it tries to cooperate with important business and CCIs in this field (glass, porcelain/ceramics) and it is also about to start a Platform of Creative Industry to even more support CCIs in the region. Hopefully, those engagements turn into actual measures.

Germany

Meanwhile quite a few business development agencies and start-up consulting agencies has been founded in Germany. The business development agencies are in most cases directly linked to public authorities such as the district offices. Nearly every county has set up such a development agency. They advise on entrepreneurship, financing, broker real estate, and arrange contact with the IHK/HWK, tax consultants, and lawyers. The different start-up consultants, such as einstein1, WSE, offer expertise, support with financial issues and have a wide network of professionals and specials in different fields, which support young entrepreneurs as “business angels”. They organise different workshops to train business skills. Some of them, such as einstein1 offer a co-working space.

Italy

Our research focused on public sector, which collaborate with MIC Faenza. The **Ministry of Culture** has offered a substantial support to ceramic cultural activities and museum with ad hoc laws. The **Faenza Town municipality** has established a specific councillorship devoted to the ceramic culture and production. The **Emilia Romagna Region** support ceramic projects from different point of view, in particular for ceramic training.

The institutions we contacted for an analysis are: CNA Ravenna; Confartigianato Ravenna; Confartigianato Emilia Romagna; IF – Imola faenza Tourism; Confindustria ceramica; Club UNESCO Forlì.

Poland

In Bolesławiec, local authorities see ceramics both as an important element of the economy and tourism product. They promote and cultivate the pottery heritage under brands such as “town of ceramics” or “Polish capital of ceramics”. Every August, the Festival of Ceramics takes place in Boleslawiec - the biggest open-air ceramics fair in the country that attracts tens of thousands of visitors. Other examples include: an exhibition of contemporary ceramics from 30 local firms that was shown in several towns across Europe; the International Ceramics and Sculpture Symposium - the oldest event of this type in the country (over 55 editions); international projects carried out in cooperation with Arginet (Artistic “Argilla” (Clay) Actions for EU Ceramic Network).

In 2015, the Association of Ceramics Municipalities in Poland was established - the first organisation in the country that brings together local governments interested in promoting industrial, consumer and artistic ceramics. So far, six municipalities have joined the association: 5 from Bolesławiec region plus Jaworzyna Śląska (porcelain centre)

We have identified three entities in the category of public-private stakeholder:

Institute of Ceramics and Building Materials is a research institution that develops new technologies, materials and solutions for the construction and ceramics sectors.

Lower Silesia Tourist Board - an association that brings together local governments, NGOs and private business to promote the region. It has no special, separate action programme concerning pottery heritage.

Polish Agency for Investment and Trade - a national government agency that supports Polish export by organising stands on international fairs and providing advice on foreign markets. It pays much attention to the promotion of Polish design.

Slovenia

In our research, we have found some examples of public sector and private-public acting. We have already mentioned the Ministry of Culture with the exemption from taxes support, which is an isolated example of support for the ceramists. We tried to find out, if any Municipalities or Regional offices in Slovenia have any connection with ceramists working in their areas, or provide them with any kind of financial or other support. In our research, we found the Municipality of Šenčur pri Kranju, which supports various ceramic's activities. They have a local museum where they founded a permanent collection of artistic ceramics in 2007. Into the field of public sector, we also added The Ministry of Economic Development and Technology, which is not so much involved into CCIs and The Public Fund of Republic of Slovenia for Entrepreneurship. Latter was established with purpose of improving the access to financial resources for different development – business investments of micro, small and medium-sized enterprises (SMEs) including with financial resources for SMEs start-up and micro financing in the Republic of Slovenia.

In Slovenia, we have few public-private acting subjects, but they are not directly connected with ceramic sector – they are supporting the CCIs in general. In our research, we found The Regional Development Agency of the Ljubljana Urban Region (RRA LUR), Centre for Creativity (CzK), Regional creative economy Centre and The Chamber of Commerce and Industry of Slovenia (CCIS). Most of these agencies are based in creative economy, supports sustainably oriented business, infrastructural, social, cultural and creative activities and connects, promotes, presents and supports the activities and development of Slovenia's cultural and creative sector (CCS).

We also included The Chamber of Craft and Small Business of Slovenia, which is obliged to support small and medium craft business in general. This counts for the Chamber of Commerce as well. The Tourist and Culture Board Kranj support some ceramic's activities as well in their region.

4. Survey results – primary data overview

The survey results of enterprises in all CerDee countries show the **attitudes and situation of current businesses** as well as **students as potential entrepreneurs** for the future in ceramic sector in the market. However, it is necessary to mention that most of the responses were obtain **before the COVID-19 pandemics**. Therefore, the entrepreneurial capacities based on the entrepreneurs' responses are related to the situation before the pandemics and **we expect dramatical changes** in the sector after this crisis.

4.1. Businesses as existing entrepreneurial capacities

We will report primary data results focused on businesses as existing entrepreneurial capacities in this subchapter. Each of CerDee countries will be described separately. The results for all CerDee countries will be described at the end of the subchapter.

4.1.1. Business as existing entrepreneurial capacities in Austria

To do a deeper analysis of entrepreneurial potential and to find out their opinions on current situation, financial conditions etc. in Austria, and the database of businesses in ceramic sector has been made. The database is open and will be updated continuously. It contains information about **84 businesses** in Austria (related to 3/2020).

The sample of Austria contains **31 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 31).

The legal forms of about 77 % are self-employed, 23 % of respondents answered 'other' **(Figure 1 (Austria))**. About 61 % of enterprises involved in the survey are in the ceramic sector more than 10 years (32 % more than 20 years, 29 % between 11 – 20 years), 19 % exist from 6 to 10 years. Only 3 % of respondents are starting their businesses (up to 2 years). **(Figure 2 (Austria))**.

The respondents see the overall situation in ceramic sector more negative than positive; however, 71 % expect a growth of the sector in next 5 years **(Figure 3 (Austria))**. Just 6 % of the respondents consider the cooperation in this sector as a sufficient, 84 % as insufficient (**Figure 4 (Austria)).,** even though almost a half of the respondents are members of some association or organization in ceramic sector in Austria and 29 % would like to be involved in this kind of cooperation **(Figure 5 (Austria)).** 71 % cooperates with some educational institution (**Figure 6 (Austria)).**

There is a **need for further education and training** visible among the respondents. Big portion of them (77 %) work actively on employee or self-training (**Figure 7 (Austria)).** Interesting and helpful topics for further education and training in craft and design skills are **modern techniques**, **foreign inspiration, historical techniques, IT skills (working with professional software)** or **decorating techniques (Figure 8 (Austria)).** From the viewpoint of management, marketing, and business skills, **courses with some ceramic personality or entrepreneurs** and **social media marketing** were found as the most helpful and interesting for further education and training, followed by presentation skills, online marketing, and marketing through traditional tools, sales skills and distribution **(Figure 9 (Austria))**

About 27 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, while 40 % do not. The rest is undecided. However, 74 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region **(Figure 10 (Austria)).** An **international portal about history of ceramics**, including pictures and videos from different regions, would help 62 % of the respondents in their activities in ceramic sector. Only 16 % find this idea as not helpful, the rest is undecided **(Figure 11 (Austria)).**

The **financial situation** shows that more than a half (53 %) of the respondents see their situation as in **average**, while 37 % as good or very good; 10 % as bad or very bad. However, 77 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. Just 14 % of the respondents have already used or required some kind of **subsidy** in last 10 years. **(Figure 12 (Austria)).**

4.1.2. Business as existing entrepreneurial capacities in Czechia

To do a deeper analysis of entrepreneurial potential and to find out their opinions on current situation, financial conditions etc. in Czechia, and the database of businesses in ceramic sector has been made. The database is open and will be updated continuously. It contains information about **125 businesses** in Czechia (related to 3/2020).

The sample of Czechia contains **56 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 56).

The legal forms of almost 69 % are self-employed, 18 % consists of Ltd, 9 % answered 'other' and 4 % of the respondents consist of joint-stock companies **(Figure 1 (Czechia)).** About 74 % of enterprises involved in the survey are in the ceramic sector more than 10 years (47 % more than 20 years, 27 % between 11 – 20 years), 14 % exist from 6 to 10 years, 7 % exist from 3 to 5 years. Only 5 % of respondents are starting their businesses (up to 2 years) **(Figure 2 (Czechia)**).

The respondents see the **overall situation in ceramic sector more negative than positive**; only 22 % expect a **growth of the sector in next 5 years (Figure 3 (Czechia)).** Just 22 % of the respondents consider the **cooperation in this sector** as a sufficient, 57 % as **insufficient (Figure 4 (Czechia)**). Just 30 % of the respondents are members of some association or organization in ceramic sector in Czechia; however, 23 % would like to be involved in this kind of cooperation **(Figure 5 (Czechia)**). More than a half (59 %) **cooperates with some educational institution (Figure 6 (Czechia)).**

There is a **need for further education and training** visible among the respondents. Big portion of them (82 %) work actively on employee or self-training **(Figure 7 (Czechia))**. Interesting and helpful topics for further education and training in craft and design skills are **foreign inspiration**, **modern techniques**, **IT skills (working with professional software)** or **design management (Figure 8 (Czechia))**. From the viewpoint of management, marketing, and business skills, **export to foreign countries**, and **social media marketing** were found as the most helpful and interesting for further education and training, followed by sales skills, presentation skills, marketing through traditional tolls, dealing with investors or clients and online marketing **(Figure 9 (Czechia)).**

About 38 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, while 47 % do not. The rest is undecided. However, 64 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region **Figure 10 (Czechia)).** An **international portal about history of ceramics**, including pictures and videos from different regions, would help 64 % of the respondents in their activities in ceramic sector. Only 18 % find this idea as not helpful, the rest is undecided **(Figure 11 (Czechia))**.

The **financial situation** shows that more than a half (62 %) of the respondents see their situation as in **average**, while 22 % as good or very good; 16 % as bad or very bad. However, 65 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. Just 21 % of the respondents have already used or required some kind of **subsidy** in last 10 years. **(Figure 12 (Czechia)).**

4.1.3. Business as existing entrepreneurial capacities in Germany

To do a deeper analysis of entrepreneurial potential and to find out their opinions on current situation, financial conditions etc. in Germany, and the database of businesses in ceramic sector has been made. The database is open and will be updated continuously. It contains information about **84 businesses** in Germany (related to 3/2020).

The sample of Germany contains **40 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question ($n \leq 40$).

The legal forms of about 90 % are self-employed, 10 % of respondents answered 'other' **(Figure 1 (Germany))**. About 72 % of enterprises involved in the survey are in the ceramic sector more than 10 years (45 % more than 20 years, 27 % between 11 – 20 years), 25 % exist from 6 to 10 years. Only 3 % of respondents are starting their businesses (up to 2 years). **(Figure 2 (Germany)).**

The respondents see the **overall situation in ceramic sector more negative than positive** and only 15 % expect a **growth of the sector in next 5 years** (**Figure 3 (Germany)**). 18 % of the respondents consider the **cooperation in this sector** as sufficient, 65 % as insufficient **(Figure 4 (Germany)).** Even though almost a half of the respondents (54 %) are members of some association or organization in ceramic sector in Germany and 26 % would like to be involved in this kind of cooperation **(Figure 5 (Germany)**). 53 % **cooperates with some educational institution** (**Figure 6 (Germany)**).

There is a **need for further education and training** visible among the respondents. Big portion of them (84 %) work actively on employee or self-training (**Figure 7 (Germany)**). Interesting and helpful topics for further education and training in craft and design skills are **modern techniques**, **foreign inspiration, decorating techniques, IT skills (working with professional software)** or **design techniques** Figure **8 (Germany)**). From the viewpoint of management, marketing, and business skills, **online marketing** and **presentation skills** were found as the most helpful and interesting for further education and training, followed by social media marketing, courses with some ceramic personality or entrepreneur, and law and intellectual property, time management and sales skills **(Figure 9 (Germany)).**

About 49 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, while 32 % do not. The rest is undecided. However, 92 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region **(Figure 10 (Germany)).** An **international portal about history of ceramics**, including pictures and videos from different regions, would help 56 % of the respondents in their activities in ceramic sector. Only 15 % find this idea as not helpful, the rest is undecided (**Figure 11 (Germany)**).

The **financial situation** shows that more than a half (54 %) of the respondents see their situation as in **average**, while 15 % as good or very good; 31 % as bad or very bad. However, 86 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. Just 21 % of the respondents have already used or required some kind of **subsidy** in last 10 years. (**Figure 12 (Germany)**).

4.1.4. Business as existing entrepreneurial capacities in Italy

To do a deeper analysis of entrepreneurial potential and to find out their opinions on current situation, financial conditions etc. in Italy, and the database of businesses in ceramic sector has been made. The database is open and will be updated continuously. It contains information about **59 businesses** in Italy (related to 3/2020).

The sample of Italy contains only **4 respondents** (n). Not all the respondents answered every question; therefore there are fewer responses in several cases of particular question (n ≤ 4). It was impossible to get more respondents from private sector in Italy, because especially entrepreneurs experienced crisis due to **COVID-19 pandemic**. It is planned to repeat the research after pandemics when more respondents will participate to get more accurate results from the survey.

The legal forms of almost 50 % are self-employed and 50 % of respondents answered 'other' **(Figure 1 (Italy)).** About 75 % of enterprises involved in the survey are in the ceramic sector more than 10 years (50 % more than 20 years, 25 % between 11 – 20 years) and 25 % of respondents are starting their businesses (up to 2 years). **(Figure 2 (Italy)**).

The respondents see the **overall situation in ceramic sector more positive than negative** and 75 % expect a **growth of the sector in next 5 years (Figure 3 (Italy))).** Half of the respondents (50 %) consider the **cooperation in this sector** as a sufficient, 25 % as **insufficient (Figure 4 (Italy)**), even though all of the respondents are members of some association or organization in ceramic sector in Italy (**Figure 5 (Italy)**). Half of them **cooperate with some educational institution** (**Figure 6 (Italy))**.

There is a **need for further education and training** visible among the respondents. Only 25 % of them work actively on employee or self-training (**Figure 7 (Italy)**). Interesting and helpful topics for further education and training in craft and design skills are **modern techniques**, **design management**, **design techniques** or **foreign inspiration (Figure 8 (Italy)).** From the viewpoint of management, marketing, and business skills, **export to foreign countries** and **social media marketing** were found as the most helpful and interesting for further education and training, followed by distribution, online marketing, presentation skills, and courses with some ceramic personality or entrepreneur, and dealing with investors or clients **(Figure 9 (Italy)).**

About 75 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, the rest is undecided. However, 100 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region (**Figure 10 (Italy)).** An **international portal about history of ceramics**, including pictures and videos from different regions, would help all of the respondents in their activities in ceramic sector **(Figure 11 (Italy)).**

The **financial situation** shows that 25 % of the respondents see their situation as in **average**, while 50 % as good or very good; 25 % as bad or very bad. However, 67 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. Just 25 % of the respondents have already used or required some kind of **subsidy** in last 10 years. **(Figure 12 (Italy))**.

4.1.5. Business as existing entrepreneurial capacities in Poland

To do a deeper analysis of entrepreneurial potential and to find out their opinions on current situation, financial conditions etc. in Poland, and the database of businesses in ceramic sector has been made. The database is open and will be updated continuously. It contains information about **51 businesses** in Poland (related to 3/2020).

The sample of Poland contains **21 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 21).

The legal forms of almost 48 % are self-employed, 38 % of respondents answered 'other', 9 % consist of joint-stock company and 5 % consist of Ltd. **(Figure 1 (Poland)).** About 75 % of enterprises involved in the survey are in the ceramic sector more than 10 years (25 % more than 20 years, 50 % between 11 – 20 years), 5 % exist from 6 to 10 years and 20 % of respondents started their businesses from 3 to 5 years ago **(Figure 2 (Poland)).**

The respondents see the **overall situation in ceramic sector more negative than positive** and only 29 % expect a **growth of the sector in next 5 years (Figure 3 (Poland)).** Just 14 % of the respondents consider the **cooperation in this sector** as a sufficient, 38 % as **insufficient (Figure 4 (Poland)**), even though more than a half of the respondents (71 %) are members of some association or organization in ceramic sector in Poland and 14 % would like to be involved in this kind of cooperation (**Figure 5 (Poland)**). Only 38 % **cooperates with some educational institution (Figure 6 (Poland)).**

There is a **need for further education and training** visible among the respondents. Big portion of them (95 %) work actively on employee or self-training **Figure 7 (Poland)**). Interesting and helpful topics for further education and training in craft and design skills are **modern techniques**, **ceramic decorating techniques**, **foreign inspiration** or **historical techniques (Figure 8 (Poland)**). From the viewpoint of management, marketing, and business skills, **online marketing**, and **sales skills** were found as the most helpful and interesting for further education and training, followed by export to foreign countries, law and intellectual property, social media marketing, distribution and courses with some ceramic personality or entrepreneur **(Figure 9 (Poland)).**

About 60 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, while 10 % do not. The rest is undecided. However, 59 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region **(Figure 10 (Poland)**). An **international portal about history of ceramics**, including pictures and videos from different regions, would help 71 % of the respondents in their activities in ceramic sector. Only 5 % find this idea as not helpful, the rest is undecided **(Figure 11 (Poland)**).

The **financial situation** shows that 40 % of the respondents see their situation as in **average**, while 45 % as good or very good; 15 % as bad or very bad. However, 50 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. Just 43 % of the respondents have already used or required some kind of **subsidy** in last 10 years. **(Figure 12 (Poland)).**

4.1.6. Business as existing entrepreneurial capacities in Slovenia

To do a deeper analysis of entrepreneurial potential and to find out their opinions on current situation, financial conditions etc. in Slovenia, and the database of businesses in ceramic sector has been made. The database is open and will be updated continuously. It contains information about **77 businesses** in Slovenia (related to 3/2020).

The sample of Slovenia contains **46 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 46).

The legal forms of almost 47 % are self-employed, 24 % of respondents answered 'other', 22 % are self-employed in culture and 7 % consists of Ltd. (**Figure 1 (Slovenia)**). About 55 % of enterprises involved in the survey are in the ceramic sector more than 10 years (33 % more than 20 years, 22 % between 11 – 20 years), 22 % exist from 6 to 10 years. Only 2 % of respondents are starting their businesses (up to 2 years). (**Figure 2 (Slovenia)**).

The respondents see the **overall situation in ceramic sector more negative than positive**; however, 63 % expect a **growth of the sector in next 5 years (Figure 3 (Slovenia)).** Just 14 % of the respondents consider the **cooperation in this sector** as a sufficient, 61 % as **insufficient (Figure 4 (Slovenia)**), even though more than a half of the respondents are members of some association or organization in ceramic sector in Slovenia and 15 % would like to be involved in this kind of cooperation (**Figure 5 (Slovenia)**). More than a half **cooperates with some educational institution Figure 6 (Slovenia)**).

There is a **need for further education and training** visible among the respondents. Big portion of them (82 %) work actively on employee or self-training (**Figure 7 (Slovenia)**). Interesting and helpful topics for further education and training in craft and design skills are **modern techniques**, **design management**, **design techniques** or **foreign inspiration Figure 8 (Slovenia)**). From the viewpoint of management, marketing, and business skills, **online marketing**, and **social media marketing** were found as the most helpful and interesting for further education and training, followed by export to foreign countries, courses with some ceramic personality or entrepreneurs, innovation management, time management, and dealing with investors or clients **Figure 9 (Slovenia)**).

About 28 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, while 57 % do not. The rest is undecided. However, 84 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region (**Figure 10 (Slovenia)**). An **international portal about history of ceramics**, including pictures and videos from different regions, would help 57 % of the respondents in their activities in ceramic sector. Only 15 % find this idea as not helpful, the rest is undecided **(Figure 11 (Slovenia)).**

The **financial situation** shows that more than a half (57 %) of the respondents see their situation as in **average**, while 15 % as good or very good; 29 % as bad or very bad. However, 83 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. Just 35 % of the respondents have already used or required some kind of **subsidy** in last 10 years. **Figure 12 (Slovenia)).**

4.1.7. Business as existing entrepreneurial capacities in all CerDee countries

The database of businesses in all CerDee countries will be updated continuously. It contains information about 480 **businesses** (Austria 84, Czechia 125, Germany 84, Italy 59, Poland 51, and Slovenia 77) in all CerDee countries (related to 3/2020).

The sample of all CerDee countries contains **198 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 198).

The legal forms of about 67 % are self-employed, 19 % of respondents answered 'other', 7 % forms Limited companies, 5 % consist of self-employed in culture and 2 % of the respondents are Joint-stock companies. Most self-employed ceramic producers form the market in Germany (90 %) and least self-employed producers are in Slovenia (47 %). On the other hand, around 22 % of the respondents are self-employed in culture in Slovenia, which is the biggest portion of this legal form of respondents in all CerDee countries. **(Figure 1 (all CerDee countries)**). About 67 % of enterprises involved in the survey are in the ceramic sector more than 10 years (39 % more than 20 years, 28 % between 11 – 20 years), 18 % exist from 6 to 10 years and 11 % exist from 3 to 5 years. Only 3 % of respondents are starting their businesses (up to 2 years). It is clear those ceramic businesses that exist more than 20 years play a big role in ceramic industry in all CerDee countries. The results of the survey show that the biggest portions of the respondents who run their businesses 20 years and longer operate in Poland (50 %). There are also many traditional ceramic producers of the ceramic in Czechia (46 %), where is also the highest number of producers, who are starting their business (5 %). (**Figure 2 (all CerDee countries)**).

The respondents see the **overall situation in ceramic sector more positive than negative**; about 40 % expect a **growth of the sector in next 5 years**. The most optimistic respondents are from Austria, where 71 % expect the growth of the ceramic sector. The situation is the opposite in Czechia, where 53 % of the respondents expect decrease of their industry in next 5 years. Figure **3 (all CerDee countries)**). 19 % of the respondents consider the **cooperation in this sector** as a sufficient, and 61 % as **insufficient Figure 4 (all CerDee countries)**). Even though almost a half of the respondents (49 %) are members of some association or organization in ceramic sector, 21 % would like to be involved in this kind of (**Figure 5 (all CerDee countries)**), and 56 % **cooperates with some educational institution (Figure 6 (all CerDee countries)**). Overall, it seems that there are opportunities how to connect all stakeholders in ceramic sector better. Respondents from Poland do not have united opinion on the sufficiency of the level of cooperation in their country. Around 38 % of them answered positively and the same portion answered negatively. On the other hand, the biggest portion of unsatisfied respondents is from Austria (84 %).

There is a **need for further education and training** visible among the respondents, even though big portions of them (82 %) work actively on employee or self-training. Most respondents who work on employee training are from Poland - 95 % and it seems that respondents from Austria should focus on this aspect, because "only" 77 % work actively on employee training. **(Figure 7 (all CerDee countries))**. Interesting and helpful topics for further education and training in craft and design skills in all CerDee countries are **modern techniques**, **foreign inspiration, decorating techniques, IT skills (working with professional software)** or **historical techniques**. **Figure 8 (all CerDee countries))**. From the viewpoint of management, marketing, and business skills, **social media marketing** and **online marketing** were found as the most helpful and interesting for further education and training, followed by **export to foreign countries**,

presentation skills, **courses with some ceramic personality or entrepreneur**, **sales skills**, **marketing through traditional tools**, **law and intellectual property** and **distribution**. **(Figure 9 (all CerDee countries))**. About 39 % of the respondents participate in the marketing activities of the overall craft development in the city/region/country, while 42 % do not, the rest is undecided. However, 77 % of **respondents are interested in participating in a marketing campaign** to promote creative sector in the region. It seems that the biggest portion of respondents from all CerDee countries participate in in the marketing activities of the overall craft development in Poland (60 %), where is also the smallest number of respondents who don't participate. However, the highest number of respondents who would be interested is such marketing activities, is in Germany (92 %), where only 3 % answered there are not interested **(Figure 10 (all CerDee countries))**. An **international portal about history of ceramics**, including pictures and videos from different regions, would help 62 % of the respondents from all CerDee countries in their activities in ceramic sector. Only 15 % find this idea as not helpful, the rest is undecided. The highest number of respondents who would appreciate international portal about history of ceramic is from Poland (77 %). **(Figure 11 (all CerDee countries)).**

The **financial situation** shows that more than a half (54 %) of the respondents see their situation as in **average**, while 24 % as good or very good; 22 % as bad or very bad. It seems that respondents from Poland (45 %) see their current financial situation best in contrast to respondents from other CerDee countries. On the other hand, the highest numbers of respondents, who see their financial situation as bad or very bad, are from Germany (31 %). However, 74 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses. The most interested in studying financial indicators are respondents from Poland (50 %). About 26 % of the respondents have already used or required some kind of **subsidy** in last 10 years. The respondents who used subsidy in last 10 years were respondents from Poland (43 %), in contrast to respondents from Austria, where only 14 % of them used some kind of subsidy. (**Figure 12 (all CerDee countries)**).

4.2. Students as potential entrepreneurial capacities

The survey results of students in Slovenia show the **attitudes and situation of students as potential entrepreneurs in ceramic sector**. However, most of the responses were obtain **before the COVIC-19 pandemics**. Therefore, the entrepreneurial capacities based on the students' responses are related to the situation before the pandemics. So, it is planned to repeat the research after pandemics when more respondents will participate.

Students from Austria, Czechia, Germany, Italy Poland or Slovenia studying ceramic or porcelain were asked about the basic information such as gender, age and the country of origin. Then the survey contains questions about study direction and the plan after finishing the school or where the students see themselves after 5 years, what their dream job is or what they want to become in the future. Questions about students' development and what kind of help would they appreciate when starting their own business were also included. More detailed information about the answers can be found in the following part of this chapter.

4.2.1. Students as potential entrepreneurial capacities in Austria

As was mentioned above, most of the responses were obtain **before the COVIC-19 pandemics**. Therefore, the entrepreneurial capacities based on the students' responses are related to the situation before the pandemics. Due to this situation includes the survey taken in Austria only one respondent. For that reason, the results will not be reported. Not all of them answered every question; therefore, there are fewer responses in several cases of particular questions.

4.2.2. Students as potential entrepreneurial capacities in Czechia

The sample contains 70 respondents (n) who are students from Czechia. These students are mostly from 15 to 18 years old (36 %), lots of them are from 19 to 21 (31 %) and then from 22 to 26 years old (20%), the rest is 27 and more years old (13 %) **Figure 13 (Czechia))**. Most of them (96 %) come from the Czech Republic, two students come from Slovenia (3%) and ones' country of origin is Russia.

Study direction of respondents is **design** (68 %), **technology** (10 %) and some other directions (22 %). **Figure 14 (Czechia)**). Most of the respondents consider **future studies** (49 %), lots of them want to start their **own business in combination with employment** (16 %) and 16 % would like to start their **own business**. They plan to settle down in the Czech Republic (67 %). The rest of students would like to live somewhere else. **Figure 15 (Czechia))**.

For many students is the dream job after finishing the school to be a **freelancer** (21 %) or **employee** in a small studio (17 %). Five years after finishing the school the respondents want to be freelancers (33 %), **designers** in private companies (14 %) and **partners** or co-**owners** of small studios (14 %). **(Figure 16 (Czechia)**).

Interviewed students developed in **creativity** (69 %) during their studies and **gained craft skills** (76 %); they also got knowledge about **history and tradition** (40 %) **(Figure 17 (Czechia))**. Students as potential entrepreneurs feel **a lack of knowledge** for future work mostly in **entrepreneurial skills** (46 %), **languages** (37 %), as well as in **managerial skills** (39 %) and **law** (41 %) **Figure 18 (Czechia))**.

For starting own business or finding an appropriate job, they would appreciate some **help with co-working space with technical and space background** (49 %), some kind of **subsidy** (54 %), and help in **marketing support** (31 %) or help with **mentoring or acceleration program for starting business** (40 %). The respondents could choose more than one answer. (**Figure 19 (Czechia)**).

The students consider themselves mostly as **designers** (81 %), **artists** (84 %) and **technologist** (43 %). This fact does not exclude the possibility to start own business in these fields. 34 % think about their future careers as a **freelancer**, 31 % as a **businessperson** and 39 % of them want to be **employed**. The respondents could also choose more than one answer. **(Figure 20 (Czechia)**).

4.2.3. Students as potential entrepreneurial capacities in Germany

In case of Germany was the survey results also influenced by the **COVID-19 pandemics.** Due to this situation includes the survey only three respondents. For that reason, this chapter will not be reported.

Three students from Germany are from 22 to 26 years old women. Their opinions are different; they study design and see themselves as artists in the future.

4.2.4. Students as potential entrepreneurial capacities in Italy

The sample contains 37 respondents (n) who are students from Italy. These students are mostly from 15 to 18 (76 %), lots of them are from 19 to 21 (11 %) and only 3 % of respondents are from

22 to 26, rest of them is 27 and more years old (11 %) **(Figure 13 (Italy))**. Only one respondent comes from Argentina and one from Cuba, other respondent's country of origin is Italy (92 %).

Study direction of respondents is **design** (86 %), **technology** (3 %) and some **other directions** (11 %) **(Figure 14 (Italy))**. Most of the respondents consider **future studies** (35 %), lots of them want to **be employed** in the industry (22 %) and 11 % would like to start their **own business**. They plan to settle down at the same place they come from (45 %). Only 18 % of the students would like to live somewhere else **Figure 15 (Italy)**).

For many students is the dream job after finishing the school to **be an employee in a small studio** (19 %), **designer in the private company** in ceramic sector (14 %) or a **freelancer** (14 %). **Five years after finishing the school** respondents want to become a **designer in the private company** in ceramic sector (16 %), **freelancer** (16 %) or **manager of small studio** (14 %) **(Figure 16 (Italy))**.

Interviewed students developed in **creativity** (62 %) during their studies, got the knowledge about **tradition and history** (46 %) and **gained craft skills** (30 %) **(Figure 17 (Italy))**. Students as potential entrepreneurs feel **lack of knowledge** for future work mostly in **languages** (49 %), **entrepreneurial skills** (43 %), as well as in **managerial skills** (27 %), **dealing with clients** (24 %) and **law** (16 %) **Figure 18 (Italy)**).

For starting own business or finding an appropriate job, they would appreciate some **help from support organization** (49 %), **professional community** (43 %). They would appreciate help with **exhibitions** (43 %), **marketing support** (46 %). The respondents could choose more than one answer **Figure 19 (Italy)**).

The students consider themselves mostly as **artists** (76 %) and **designers** (68 %). This fact does not exclude the possibility to start own business in these fields. 29 % think about their future careers as a **businessperson**, 27 % as a **freelancer,** 21 % as a **technologist** and only 14% of them want to **be employed**. The respondents could choose more than one answer **(Figure 20 (Italy)).**

4.2.5. Students as potential entrepreneurial capacities in Poland

The sample contains 30 respondents (n) who are students from Poland. These students are mostly from 15 to 18 (73 %), lots of them are from 19 to 21 (13 %) and 13 % of respondents are 27 and more years old **(Figure 13 (Poland))**. All the respondents come from Poland.

Study direction of respondents is **design** (55 %), **technology** (41 %) and some **other directions** (4 %) **(Figure 14 (Poland))**. Most of the respondents want to **be employed** in the industry (57 %) and 33 % consider **future studies**. They plan to settle down at the same place they come from (73 %). Only 17 % of the students would like to live somewhere else **(Figure 15 (Poland)).**

For many students is the dream job after finishing the school to **become a freelancer** (43 %), **partner or co-owner of a small studio** in ceramic sector (10 %) or a **designer in the private company** (10 %). **Five years after finishing the school** respondents want to become a **freelancer** (27 %), **manager of small studio** (17 %), some of them want to be **an employee in a small studio** (10 %) or **cultural institution** (10 %). The others consider becoming a **technologist in the private company** in ceramic sector (7 %), **partner or co-owner** of small studio (7 %) **Figure 16 (Poland)**).

Interviewed students developed in **creativity** (80 %) during their studies, got the knowledge about **networking and social** contact (53 %), **tradition and history** (20 %) and gained **craft skills**

(20 %) **(Figure 17 (Poland)**). Students as potential entrepreneurs feel **lack of knowledge** for future work mostly in **languages** (63 %), **entrepreneurial skills** (33 %), as well as in **managerial skills** (30 %), **dealing with clients** (27 %) and **law** (20 %) **Figure 18 (Poland)**).

For starting own business or finding an appropriate job, they would appreciate some **help with marketing support,** they would appreciate some **help from support organization** (30 %), **professional community** (30 %). Companies would also appreciate help with **mentoring or acceleration program** for starting business (30 %), **sharing promotion and sell platform** (27 %) and some kind of **subsidy** (27 %). The respondents could choose more than one answer **Figure 19 (Poland)).**

The students consider themselves mostly as **employees** (60 %). Then **artists** (57 %) and **designers** (37 %). This fact does not exclude the possibility to start own business in these fields. 33 % think about their future careers as a **freelancer**, 20 % as a **technologist** and only 10 % of the respondents want to become **businessperson Figure 20 (Poland)**).

4.2.6. Students as potential entrepreneurial capacities in Slovenia

The sample contains 14 respondents (n) who are students from Slovenia. These students are mostly from 22 to 26 years old (50%), lots of them are from 19 to 21 (43 %) and the rest is 27 and more years old (7 %) **Figure 13 (Slovenia)**). Only one respondent comes from Russia, 13 respondent's country of origin is Slovenia.

Study direction of respondents is **design** (86 %) and some other directions (14 %) **(Figure 14 (Slovenia)**). Most of the respondents consider **future studies** (36 %), lots of them want to **start their own business** (29 %) and 21 % would like to combine their **own business with employment**. They plan to settle down at the same place they come from (43 %). Only 2 of the students would like to live somewhere else **(Figure 15 (Slovenia)**).

For many students is the dream job after finishing the school to be a partner or a co-owner of a small studio (36 %). Five years after finishing the school respondents want to become a manager of small studio (36 %) **(Figure 16 (Slovenia)**).

Interviewed students developed in **creativity** (77 %) during their studies and gained craft skills (64 %) **Figure 17 (Slovenia)**). Students as potential entrepreneurs feel **lack of knowledge** for future work mostly in **entrepreneurial skills** (57 %), **dealing with clients** (43 %), as well as in **managerial skills** (50 %) and **law** (64 %) **Figure 18 (Slovenia)).**

For starting own business or finding an appropriate job, they would appreciate some **help in sharing promotion and sell platform** (93 %), some kind of **subsidy** (71 %), and help in **marketing** support (57 %) or help with **exhibitions** (43 %). The respondents could choose more than one answer. **Figure 19 (Slovenia)).**

The students consider themselves mostly as **designers** (93 %) and **artists** (79 %). This fact does not exclude the possibility **to start own business in these fields**. 50 % think about their future career as **a freelancer**, 29 % as **a businessperson** and only 7% of them want to be **employed**. The respondents could choose more than one answer. **Figure 20 (Slovenia)).**

4.2.7. Students as potential entrepreneurial capacities in all CerDee countries

The sample contains **155 respondents** (n) who are students from all CerDee countries. Responses from Austria and Germany did not influence the results of the data relating generally to all the CerDee countries because of the low number of students who participate in the survey (1 student from Austria, 3 students from Germany). Most respondents were obtained in Czechia (70), and then in Italy (37) and Poland (30), in Slovenia were obtained 14 respondents.

These students are mostly from 15 to 18 years old (48 %), lots of them are from 19 to 21 (23 %) and then from 22 to 26 years old (17 %), the rest is 27 and more years old (12 %). The respondent in this sample are mainly women (80 %) and the rest are men (20 %) **(Figure 13 (all CerDee countries)**). Only in Slovenia are students mostly from 22 to 26 years old and all the three students from Germany are also from 22 to 26.

Study direction of respondents is **design** (71 %), **technology** (14 %) and some other directions (15 %) **(Figure 14 (all CerDee countries)**). Most of the respondents consider **future studies** (40 %), lots of them want to become an **employee** (25 %), some of the students want to start their **own business in combination with employment** (10 %) and 7 % would like to start their **own business (Figure 15 (all CerDee countries)**). They plan to settle down in their country of origin (64 %). The rest of students would like to live somewhere else **(Figure 16 (all CerDee countries)**). Design as a study direction took first place in all the CerDee countries, and then there was technology, as second study direction only students from Slovenia do not study technology but some other directions. Students from CerDee countries consider mostly future studies after finishing the school. Many of students from Poland (57 %) want to become employees and this fact placed the employment in second place. Becoming an employee is not often represented in other CerDee countries.

Interviewed students developed in **creativity** (70 %) during their studies and gained **craft skills** (53 %); they also got knowledge about **history and tradition** (37 %) **(Figure 17 (all CerDee countries))**. Students as potential entrepreneurs feel **a lack of knowledge** for future work mostly in **entrepreneurial skills** (43 %), **languages** (43 %), as well as in **managerial skills** (34 %) and **law** (34 %), then in **dealing with clients** (25 %) and in **presentation skills** (19 %) **Figure 18 (all CerDee countries))**. In general, students answered that they developed mostly in creativity. In the Czech Republic, students developed mostly in craft skills and in Poland was one extra skill. Polish students developed also in networking and social contact very well (53 %) in contrast with the other CerDee countries. Lack of knowledge in entrepreneurial skills and lack of knowledge in languages take the first place generally. Nevertheless, in Slovenia was not this answer represented so often, on the other hand in this country students feel a greater lack of knowledge in dealing with clients in comparison to the other CerDee countries.

For starting own business or finding an appropriate job, they would appreciate some **help with co-working space with technical and space background** (35 %), some kind of **subsidy** (38 %), help in **marketing support** (38 %) and help with **exhibitions** (37 %) or help with **mentoring or acceleration program for starting business** (33 %). The respondents could choose more than one answer **Figure 19 (all CerDee countries)**). In addition to these mentioned ways of help to the students starting their own businesses there were some other ways mentioned. Students will also appreciate help from a professional community to start their business successfully In Italy and Poland. Subsidy would be more appreciated in Slovenia and then in Czechia.

The students consider themselves mostly as **artists** (77 %), **designers** (70 %) and **technologist** (32 %). This fact does not exclude the possibility to start own business in these fields. 34 % think about their future careers as a **freelancer**, 34 % of them want to be **employed** and 27 % want to become a **businessperson**. The respondents could also choose more than one answer **Figure 20 (all CerDee countries)**. While employment is one of the least selected answers, in Poland it is the most common option, 60 % of Polish students want to become an employee. The number of students who want to be a businessperson once in the future fluctuates around 30 % in Czechia, Italy and Slovenia; there is a different situation in Poland. Only 10 % of students from Poland want to become a businessperson.

4.3. Expectations and needs of stakeholders

Expectations and needs are aspects, which make up important part of the research. Expectations of stakeholders give the way that the sector and industry may develop in few years horizon. The essential step to give exact recommendation is to find what the needs of the stakeholders are. These two aspects are closely explained in this part of the report.

4.3.1. Expectations and needs of stakeholders in CerDee countries

This subchapter describes expectations and needs of stakeholders in all CerDee countries, where all of CerDee countries will be described separately. The results for all CerDee countries will be described at the end of the subchapter.

4.3.1.1. Expectations and needs of stakeholders in Austria

The respondents were asked to rate the **current situation of ceramic sector** in Austria at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 15 % of the respondents rated this statement with 6 and more points, on the other hand 85 % rated between 1 and 5 points. In contrast, 71 % of the entrepreneurs think that the **sector will grow in next 5 years**; only 10 % expect the **sector will experience decrease** and the rest of the respondents think that the condition of the ceramic **sector will not change (Figure 21 (Austria)).**

In next part of the questionnaire, respondents were asked to rate intensity, importance of cooperation with each sector and rate the influence of each sector on the scale between 1 and 10 points based on same principle again. Answers of each stakeholders sector are compared to the mean of stakeholders sector form all CerDee countries.

Intensity of current cooperation with **almost all stakeholder sectors** was rated **lower** in Austria in comparison to other CerDee countries, except the intensity of current cooperation with **private sector Figure 22 (Austria)**). **Importance of cooperation** with **cultural institutions** and **professional institutions** was rated **lower**, but with Austrian **educational institutions**, **private sector**, **public sector** and **public-private acting sector** the **importance of cooperation** is seen **more important** than in the other CerDee countries **(Figure 23 (Austria)**). **Influence level** of **almost all stakeholder sectors** is seen **smaller** in Austria than is the average from all countries, except influence level of **private sector Figure 24 (Austria)**).

Big problem for ceramic sector in Austria seems to be the lack of support and promotion by social media and not many opportunities where the entrepreneurs can exhibit their products, such as galleries etc. **Figure 25 (Austria)**).

As just 6 % of the respondents consider the **cooperation in the ceramic sector as a sufficient Figure 26 (Austria)**), many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer.

For 74 % of the respondents is the most important **benefit from the cooperation** is **joint marketing**, for 68 % it is some kind of **subsidy** and 48 % see it like an opportunity for **information services**. Around 45 % of the respondents see it like an opportunity for **help with accessing new markets Figure 27 (Austria)**). **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation, but only 29 % of the respondents feel that they **have enough information** about how to get it, 58 % disagree and the rest is undecided. On the statement **'I am going to apply for a subsidy in the future'**, 23 % reacted positively and 35 % negatively **(Figure 28 (Austria)**). **External capital**, as an instrument of financing a business, was used by 33 % of the respondents in last 10 years, but only 19 % plan to use it in the future **Figure 29 (Austria)**.

4.3.1.2. Expectations and needs of stakeholders in Czechia

The respondents were asked to rate the **current situation of ceramic sector** in Czechia at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 25 % of the respondents rated this statement with 6 and more points, on the other hand 75 % rated between 1 and 5 points. Only 22 % of the entrepreneurs think that the **sector will grow in next 5 years**; in contrast 53 % expect the **sector will experience decrease** and the rest of the respondents think that the condition of the ceramic **sector will not change Figure 21 (Czechia)**).

In next part of the questionnaire, respondents were asked to rate intensity, importance of cooperation with each sector and rate the influence of each sector on the scale between 1 and 10 points based on same principle again. Answers of each stakeholders sector are compared to the mean of stakeholders sector form all CerDee countries.

Intensity of current cooperation with Czechian **professional institutions** and **public sector** was evaluated **lower** than is the CerDee mean. In comparison, the **intensity of cooperation** with **cultural institutions**, **educational institutions**, **private sector** and **public-private acting sector** was rated **higher (Figure 22 (Czechia)**). **Importance of cooperation** with **educational sector**, **private sector**, **professional institutions** and **public-private acting sector** was rated **lower**, but with Czech **cultural institutions** and **public sector** the **importance of cooperation** is seen **more important** than in the other CerDee countries **Figure 23 (Czechia)**). **Influence level** of **almost all stakeholder sectors** except **educational institutions** and **private sector** is seen **smaller** than is the average from all countries **Figure 24 (Czechia)**).

Big problem for ceramic sector in Czechia seems to be **small demand** after their **products** due to import of cheap ceramic products from abroad. Entrepreneurs think that **national institutions do not help them**, especially with financing new businesses or starting a project in their sector. **(Figure 25 (Czechia)**).

As just 22 % of the respondents consider the **cooperation in the ceramic sector as a sufficient Figure 26 (Czechia)**), many of them would appreciate to **participate in** some **project** and the cooperation between their businesses and public sector to be closer. Especially**, connection with national or regional institutions** like ministries, professional associations, tourist information centres, television and other mass media.

For 63 % of the respondents is the most important **benefit from the cooperation** is **joint marketing**, for 55 % it is a **help with accessing new markets** and 52 % see it like an opportunity to get some kind of **subsidy**. Almost 34 % of the respondents would appreciate **help with accessing new markets Figure 27 (Czechia)**). **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation, but only 21 % of the respondents feel that they **have enough information** about how to get it, 50 % disagree and the rest is undecided. On the statement **'I am going to apply for a subsidy in the future'**, 36 % reacted positively and 36 % negatively **Figure 28 (Czechia))**. **External capital**, as an instrument of financing a business, was used by only 20 % of the respondents in last 10 years and 23 % plan to use it in the future **(Figure 29 (Czechia)).**

4.3.1.3. Expectations and needs of stakeholders in Germany

The respondents were asked to rate the **current situation of ceramic sector** in Germany at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 30 % of the respondents rated this statement with 6 and more points, on the other hand 70 % rated between 1 and 5 points. Only 15 % of the entrepreneurs think that the **sector will grow in next 5 years**; but 38 % expect the **sector will experience decrease** and the rest of the respondents think that the condition of the ceramic **sector will not change Figure 21 (Germany)**).

In next part of the questionnaire, respondents were asked to rate intensity, importance of cooperation with each sector and rate the influence of each sector on the scale between 1 and 10 points based on same principle again. Answers of each stakeholders sector are compared to the mean of stakeholders sector form all CerDee countries.

Intensity of current cooperation with **almost all stakeholder sectors** was rated **lower** in Germany in comparison to other CerDee countries, except the cooperation with **public sector (Figure 22 (Germany)**). **Importance of cooperation** with **private sector** and **professional institutions** was rated **lower**, cooperation with German **cultural institutions**, **educational institutions, public sector** and **public-private acting sector** is seen **more important** than in the other CerDee countries **Figure 23 (Germany)**). **Influence level** of **educational institutions, private sector** and **professional institutions** is seen **smaller** in Germany than is the average from all countries; on the other hand, the influence level of **cultural institutions, public sector** and **public-private acting sector** is higher in respondents' opinion **(Figure 24 (Germany)**).

Big problem for ceramic sector in Germany seems to be the lack of support and promotion by social media or traditional media like newspaper and not many opportunities where the entrepreneurs can exhibit their products, such as galleries etc. Many respondents would appreciate to educate students about ceramic sector in their region to promote art and craft to young people **Figure 25 (Germany)).**

As just 18 % of the respondents, consider the **cooperation in the ceramic sector as a sufficient Figure 26 (Germany)**) many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer.

For 88 % of the respondents, the most important **benefit from the cooperation** is **joint marketing**, for 68 % it is **information service** and for 58 % some kind of **subsidy**. Almost a half of the respondents (45 %) see it like an opportunity for **help with administration** and **help with accessing new markets Figure 27 (Germany)**). **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation, but only 20 % of the respondents feel that they **have enough information** about how to get it, 65 % disagree and the rest is undecided. On the statement **'I am going to apply for a subsidy in the future'**, 20 % reacted positively and 31 % negatively **Figure 28 (Germany)**). **External capital**, as an instrument of financing a business, was used by 24 % of the respondents in last 10 years and only 8 % plan to use it in the future **Figure 29 (Germany))**.

4.3.1.4. Expectations and needs of stakeholders in Italy

The sample of Italy contains only **four respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 4). It was impossible to get more respondents from private sector in Italy, because especially entrepreneurs experienced crisis due to **COVID-19 pandemic**. It is planned to repeat the research after pandemics when more respondents will participate to get results that are more accurate from the survey.

The respondents were asked to rate the **current situation of ceramic sector** in Italy at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 75 % of the respondents rated this statement with 6 and more points, on the other hand 25 % rated between 1 and 5 points. Also 75 % of the entrepreneurs think that the **sector will grow in next 5 years**; only 25 % rest of the respondents think that the condition of the ceramic **sector will not change Figure 21 (Italy)**).

In next part of the questionnaire, respondents were asked to rate intensity, importance of cooperation with each sector and rate the influence of each sector on the scale between 1 and 10 points based on same principle again. Answers of each stakeholders sector are compared to the mean of stakeholders sector form all CerDee countries.

Intensity of current cooperation with **all stakeholder sectors** was rated **higher** in Italy in comparison to other CerDee countries **Figure 22 (Italy)**. The **cooperation** with all Italian stakeholder sectors is thought to be **more important** than in the other CerDee countries **Figure 23 (Italy))**. In addition, the **influence level** of each is seen **bigger** than is the average from all countries **Figure 24 (Italy).**

Big problem for ceramic sector in Italy seems to be education in this industry. Many entrepreneurs think that education in this industry should have higher quality. They would appreciate more cultural activities, which could promote ceramic sector in their region **Figure 25 (Italy)).**

As 50 % of the respondents consider the **cooperation in the ceramic sector as a sufficient Figure 26 (Italy)**, many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer. Especially, connection with national or regional institutions like ministries, professional associations, tourist information centres, television and other mass media.

For 100% of the respondents is the most important **benefit from the cooperation** is **help with accessing new markets** and **joint marketing**, for 75 % it is an opportunity to get some kind of **subsidy Figure 27 (Italy)**. **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation, but only 25 % of the respondents feel that they **have enough information** about how to get it, 50 % disagree and the rest is undecided. On the statement **'I am going to apply for a subsidy in the future'**, 25 % negatively and the rest is undecided **Figure 28 (Italy)**). **External capital**, as an instrument of financing a business, was used by 33 % of the respondents in last 10 years and 33 % plan to use it in the future **Figure 29 (Italy)**).

4.3.1.5. Expectations and needs of stakeholders in Poland

Expectations and needs are aspects, which make up important part of the research. Expectations of stakeholders give the way that the sector and industry may develop in few years horizon. The essential step to give exact recommendation is to find what the needs of the stakeholders are. These two aspects are closely explained in this part of the report.

The respondents were asked to rate the **current situation of ceramic sector** in Poland at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 45 % of the respondents rated this statement with six and more points, on the other hand 55 % rated between 1 and 5 points. On top of that, only 29 % of the entrepreneurs think that the **sector will grow in next 5 years**; only 29 % expect the **sector will experience decrease** and the rest of the respondents think that the condition of the ceramic **sector will not change Figure 21 (Poland))**.

In next part of the questionnaire, respondents were asked to rate intensity, importance of cooperation with each sector and rate the influence of each sector on the scale between 1 and 10 points based on same principle again. Answers of each stakeholders sector are compared to the mean of stakeholders sector form all CerDee countries.

Intensity of current cooperation with **almost all Polish stakeholder sectors** was rated **higher** than the CerDee mean, except **private sector**, where the cooperation was evaluated as **extensive Figure 22 (Poland)**). **Importance of cooperation** with **educational sector**, **private sector** and **public-private acting sector** was rated **lower**, but with Polish **cultural institutions**, **professional institutions** and **public sector** the **cooperation** is seen **more important** than in the other CerDee countries (**Figure 23 (Poland)**). **Influence level** of **cultural institutions**, **educational institutions**, **professional institutions** and **public sector** is seen **bigger** than is the average from all countries, the rest of stakeholder sectors such as **private sector** and **public-private acting sector** are thought to have less influence **Figure 24 (Poland)**).

Big problem for ceramic sector in Poland seems to be education in this industry. Many stakeholders think that there should be more educational institutions in Poland. In relation, many respondents answered there is a lack of skilled labour. The third point is that Polish ceramic products are replaced with cheaper imported goods from abroad **Figure 25 (Poland)**).

As just 38 % of the respondents consider the **cooperation in the ceramic sector as a sufficient Figure 26 (Poland)**), many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer. Especially, connection with national or regional institutions like ministries, professional associations, tourist information centres, television and other mass media.

For 67 % of the respondents is the most important **benefit from the cooperation** is **help with accessing new markets**, for 62 % it is **joint marketing** and some kind of **subsidy**. Only 33 % sees it like an opportunity for **co-working Figure 27 (Poland)**). **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation and 40 % of the respondents feel that they **have enough information** about how to get it, 30 % disagree and the rest is undecided. On the statement **'I am going to apply for a subsidy in the future'**, 47 % reacted positively and just 10 % negatively **Figure 28 (Poland)**). **External capital**, as an instrument of financing a business, was used by only 29 % of the respondents in last 10 years, but 38 % plan to use it in the future **Figure 29 (Poland)**).

4.3.1.6. Expectations and needs of stakeholders in Slovenia

The respondents were asked to rate the **current situation of ceramic sector** in Slovenia at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 46 % of the respondents rated this statement with 6 and more points, on the other hand 54 % rated between 1 and 5 points. In contrast, 56 % of the entrepreneurs think that the **sector will grow in next 5 years**; only 8 % expect the **sector will experience decrease** and the rest of the respondents think that the condition of the ceramic **sector will not change Figure 21 (Slovenia)**).

In next part of the questionnaire, respondents were asked to rate intensity, importance of cooperation with each sector and rate the influence of each sector on the scale between 1 and 10 points based on same principle again. Answers of each stakeholders sector are compared to the mean of stakeholders sector form all CerDee countries.

Intensity of current cooperation with Slovenian **cultural institutions**, **educational sector** and **public-private acting sector was** evaluated **lower** than is the CerDee mean. In comparison, the **intensity of cooperation** with **professional institutions** and **public sector** was rated **higher**, and with Slovenian **private sector slightly higher** than the CerDee mean **Figure 22 (Slovenia)**). **Importance of cooperation** with **cultural institutions**, **educational sector**, **private sector**, **public sector and public-private acting sector** was rated **lower**, but with Slovenian **professional institutions,** the **importance of cooperation** is seen **more important** than in the other CerDee countries Figure **23 (Slovenia)**). **Influence level** of each sector except the **private sector** is seen **bigger** than is the average from all countries **Figure 24 (Slovenia)**).

Big problem for ceramic sector in Slovenia seems to be education in this industry. Many entrepreneurs think that it should be given bigger importance to educate students in high schools and universities and educate public in ceramic sector **Figure 25 (Slovenia)**).

As just 14 % of the respondents consider the **cooperation in the ceramic sector as a sufficient Figure 26 (Slovenia)**), many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer. Especially, connection with national or regional institutions like ministries, professional associations, tourist information centres, television and other mass media.

For 76 % of the respondents is the most important **benefit from the cooperation** is some kind of subsidy, for 67 % it is a **help with accessing new markets** and also **joint marketing**. More than a half of the respondents (57 %) see it like an opportunity for gaining **external investments Figure 27 (Slovenia))**. **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation, but only 24 % of the respondents feel that they **have enough information** about how to get it, 56 % disagree and the rest is undecided. On the statement **'I am going to apply for a subsidy in the future'**, 46 % reacted positively and just 16 % negatively **Figure 28 (Slovenia))**. **External capital**, as an instrument of financing a business, was used by only 13 % of the respondents in last 10 years, but 38 % plan to use it in the future **Figure 29 (Slovenia)).**

4.3.1.7. Expectations and needs of stakeholders in all CerDee countries

The respondents from all CerDee countries were asked to rate the **current situation of ceramic sector** at the beginning of the questionnaire. On the scale where 1 point means worst and 10 points mean best, 29 % of the respondents rated this statement with 6 and more points, on the other hand 71 % rated between 1 and 5 points. Respondents from Slovenia (46 %) and Poland (45

%) were the most optimistic in evaluation of the current situation in their country. It is related to their pessimistic view of general trend of ceramic sector in next 5 years – only 40 % of the entrepreneurs think that the **sector will grow in next 5 years**; 29 % expect the **sector will experience decrease** and the rest of the respondents think that the condition of the ceramic **sector will not change**. The most optimistic respondents are from Austria, where 71 % expect the growth of the ceramic sector. The situation is the opposite in Czechia, where 53 % of the respondents expect decrease of their industry in next 5 years **Figure 21 (all CerDee countries)**).

In next part of the questionnaire, respondents were asked to rate intensity **(Figure 22 (all CerDee countries))** and importance **Figure 23 (all CerDee countries)** of cooperation with each sector and to rate the influence **Figure 24 (all CerDee countries)**) of each sector on the scale between 1 and 10 points, where 1 point means the worst and 10 points mean the best.

We analysed the data of respondents' responses with the method of benchmarking and filtered out the most important information. We created a table for each of these three questions to make the information clear. There will be also a short summary under each of these tables.

Note: Values for the intensity and importance of current cooperation and influence level will not be analysed due to lack of respondents.

Table 12 Intensity of current cooperation (points)

GEO/SECTOR	Cultural institutions	Educational institutions	Private sector	Professional institutions	Public sector	Public-private acting sector
Austria	3.34	3.59	5.11	3.23	2.47	3.11
Czechia	4.33	4.80	5.41	3.71	3.04	3.25
Germany	3.59	2.84	4.28	3.63	3.18	2.97
(Italy)	(4.75)	(4.25)	(6.00)	(4.75)	(5.75)	(5.25)
Poland	3.88	2.95	4.84	4.45	2.95	3.28
Slovenia	3.96	3.91	4.89	4.27	3.36	2.74
CerDee	3.90	3.83	4.99	3.87	3.10	3.10

Source: Own database

Countries where the cooperation with all stakeholder sectors was evaluated as the most intensive are following: cultural institutions – Czechia (4.33), educational institutions – Czechia (4.80), private sector – Czechia (5.41), professional institutions – Poland (4.45), public sector – Slovenia (3.36) and public-private acting sector – Poland (3.28). In comparison there are the countries where the cooperation was rated as the most extensive: cultural institutions – Austria (3.34), educational institutions – Germany (2.84), private sector – Germany (4.28), professional institutions – Austria (3.23), public sector – Austria (2.47) and public-private acting sector – Slovenia (2.74).

Table 13 Importance of current cooperation (points)

GEO/SECTOR	Cultural institutions	Educational institutions	Private sector	Professional institutions	Public sector	Public-private acting sector
Austria	4.37	4.77	5.87	4.34	5.21	4.62
Czechia	4.46	4.73	4.77	4.64	4.48	4.42
Germany	5.26	4.45	4.47	4.17	4.74	4.18
(Italy)	(6.50)	(5.00)	(6.25)	(6.00)	(6.75)	(6.50)
Poland	4.17	2.61	4.35	4.37	3.29	3.75
Slovenia	3.52	3.93	3.71	4.18	3.73	3.59
CerDee	4.38	4.29	4.63	4.39	4.39	4.12

Source: Own database

Countries where the cooperation with all stakeholder sectors was evaluated as the most important are following: cultural institutions – Germany (5.26), educational institutions – Austria (4.77), private sector – Austria (5.87), professional institutions – Czechia (4.64), public sector – Austria (5.21) and public-private acting sector – Austria (4.62). In comparison there are the countries where the cooperation was rated as the least important: cultural institutions – Slovenia (3.52), educational institutions - Poland (2.61), private sector – Slovenia (3.71), professional institutions – Germany (4.17), public sector – Poland (3.29) and public-private acting sector – Slovenia (3.59).

Table 14 Influence level (points)

GEO/SECTOR	Cultural institutions	Educational institutions	Private sector	Professional institutions	Public sector	Public-private acting sector
Austria	4.15	4.07	5.21	4.58	3.62	3.63
Czechia	4.47	4.36	5.43	4.25	4.10	3.95
Germany	5.33	4.41	4.79	4.35	4.84	4.81
(Italy)	(5.00)	(5.50)	(6.50)	(5.75)	(3.50)	(5.00)
Poland	5.72	4.29	4.53	5.56	5.37	4.65
Slovenia	5.00	5.18	4.89	5.66	4.52	4.97
CerDee	4.87	4.54	5.07	4.87	4.39	4.39

Source: Own database

Here are the stakeholder sectors and countries, where the sectors are thought to have the biggest influence: cultural institutions – Poland (5.72), educational institutions – Slovenia (5.18), private sector – Czechia (5.43), professional institutions – Slovenia (5.66), public sector – Poland

(5.37) and public-private acting sector – Slovenia (4.97). In comparison there are the stakeholder sectors and countries, where the sectors are thought to have the smallest influence: cultural institutions – Austria (4.15), educational institutions – Austria (4.07), private sector – Poland (4.53), professional institutions – Czechia (4.25), public sector – Austria (3.62) and public-private acting sector – Austria (3.63).

Only 19 % of the respondents consider the **cooperation in the ceramic sector as a sufficient**, 61 % as insufficient. **Figure 25 (all CerDee countries))**. Overall, it seems that there are opportunities how to connect all stakeholders in ceramic sector better. Respondents from Poland don't have united opinion on the sufficiency of the level of cooperation in their country. Around 38 % of them answered positively and the same portion answered negatively. On the other hand, the biggest portion of unsatisfied respondents is from Austria (84 %).

The most important **benefit from the cooperation** for 71 % of the respondents is **joint marketing**, for 63 % it is a **subsidy** and 57 % see it like an opportunity for **help to access new markets**. Almost a half of the respondents (43 %) would benefit from **information service (Figure 27 (all CerDee countries)**). **Subsidy** is one of the main goals for entrepreneurs when taking part in cooperation, but only 22 % of the respondents feel that they **have enough information** about how to get it, 56 % disagree and the rest is undecided. It seems that the best-informed respondents are from Poland, because 40 % of them think that they have enough information how to get a subsidy. However, there is no united opinion on this statement, because also 40 % of the respondents answered negatively. On the other hand, the least informed respondents are from Germany, because 65 % of them think they have not enough information how to get a subsidy. On the statement '**I am going to apply for a subsidy in the future**', 33 % reacted positively and just 27 % negatively. The biggest portions of respondents who want to apply for a subsidy in the future are the respondents from Poland (47 %) and Slovenia (46 %). In contrast, the biggest portions of respondents who are not interested in such cooperation are respondents from Czechia (36 %) and Austria (35 %). **External capital**, as an instrument of financing a business, was used by only 22 % of the respondents in last 10 years and only 24 % plan to use it in the future. The biggest number of respondents, who used external capital in last 10 years, is respondents form Austria (33 %) and the biggest number of respondents who didn't use external capital is from Slovenia (87 %). About 38 % of the respondents from Poland and 38 % from Slovenia are interested in using external capital in the future. The biggest portions of respondents who are not interested in external capital are from Austria (64 %).

4.3.2. Expectations and needs of stakeholder sectors

Next part of the report is focused on expectations and needs of each sector of the respondents. Description of each sector is based on their answers on the scale from 1 to 10, where 1 is lowest and 10 the highest, on questions 'Intensity of current cooperation', 'Importance of cooperation' and 'Influence level' towards other sectors. The results for all sectors will be described at the end of the subchapter.

4.3.2.1. Expectations and needs of cultural institutions

Austria

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 2 cultural institutions, 3 educational institutions, and 30 respondents from private and one respondent from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **cultural institutions** see the **current cooperation** with **educational institutions** (6.00) and **public sector** (6.50) quite **intensive**. Intensity of cooperation with other **cultural institutions** and **professional institutions** was rated as an **average** (5.00 and 5.50) and cooperation with **private sector** and **public-private acting sector** is seen as **extensive** in their opinion (3.00 and 4.00).

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (10.00).

The respondents from **cultural institutions** consider **influence level** of **almost all stakeholder sectors** as **high** (> 7.00), except **private sector**, whose influence was rated low (3.50).

Czechia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 7 cultural institutions, 12 educational institutions, and 56 respondents from private and 3 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **cultural institutions** see the **current cooperation** with other **cultural institutions** (7.00) quite **intensive**. Intensity of cooperation with **educational institutions** (6.17) and **public sector** (6.17) was rated as an **average** and cooperation with **private sector**, **professional institutions** and with **public sector** is seen as **extensive** in their opinion (3.20, 3.75 and 4.25).

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (> 7.50).

The respondents from **cultural institutions** consider **influence level** of **each stakeholder sector** as **high** (> 7.50).

Germany

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 1 cultural institution, 1 educational institution, and 41 respondents from private and 2 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **cultural institutions** see the **current cooperation** with other **cultural institutions** (10.00), **educational institutions** (6.00), **private sector** (7.00) and **public-private acting sector** (6.00) quite **intensive**. Intensity of cooperation with **professional institutions** and **public sector** is seen as **extensive** in their opinion (4.00 and 4.00).

The **importance of cooperation** with other **cultural institutions** (9.00) and **educational institutions** (7.00) was rated **high**. On the other hand, cooperation with **private sector** (5.00) and **professional institutions** (5.00) was rated as an average and cooperation with **public sector** and **public-private acting sector** is thought to be extensive (4.00 and 4.00).

The respondents from **cultural institutions** consider **influence level** of **almost all stakeholder sectors** as **high** (> 6.50), except **public-private acting sector**, whose influence was rated low (3.00).

Italy

It is necessary to keep in mind the structure of respondents' sample. The structure is following: three cultural institutions, 0 educational institution, and 4 respondents from private and 6 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **cultural institutions** see the **current cooperation** with **almost all stakeholder sectors** as **intensive** (> 6.50), only cooperation with **educational institutions** is seen as an **average** (6.33) in their opinion.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (> 6.50).

The respondents from **cultural institutions** consider **influence level** of other **cultural institutions** (6.00), **educational institutions** (6.00) and **private sector** as an **average**, and influence of **professional institutions (**6.67), **public sector** (7.00) and **public-private acting sector** (6.67) is seen as **high**.

Poland

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 7 educational institutions, and 21 respondents from private and six respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **cultural institutions** see the **current cooperation** with other **cultural institutions** (7.33), **educational institutions** (7.67), **professional institutions** (6.67) and **public sector** (8.00) quite **intensive**. Intensity of cooperation with **private sector** (5.33) and **public-private acting sector** (5.67) was rated as an **average**.

The cooperation with **other cultural institutions** (9.00), **educational institutions** (8.67), **private sector** (7.00) and **public-private acting sector** (9.67) was rated as **important**; only importance of cooperation with **professional institutions** (6.00) and **public-private acting sector** (6.00) was evaluated as an **average**.

The respondents from **cultural institutions** consider **influence level** of only **private sector** (8.67) as **high**. Influence of other **cultural institutions** (4.00) is thought to be **low** and influence of **educational institutions** (6.33), **professional institutions** (6.00, **public sector** (4.67) and **public-private acting sector** (5.00) is seen as an **average**.

Slovenia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 6 cultural institutions, 1 educational institution, and 46 respondents from private and eight respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **cultural institutions** see the **current cooperation** with other **cultural institutions** (7.33) and **educational institutions** (7.50) quite **intensive**. Intensity of cooperation with **private sector**, **professional institutions** and **public sector** was rated as an **average** (5.17, 5.50 and 5.33) and cooperation with **public-private acting sector** is seen as **extensive** in their opinion (2.80).

In comparison, the **importance of cooperation** with **almost all stakeholder sectors** was rated **high**; only importance of cooperation with **public-private acting sector** was evaluated as an **average** (5.67).

The respondents from **cultural institutions** consider **influence level** of **each stakeholder sector** as **high** (> 7.00).

Summary

The respondents from **cultural institutions** from all CerDee countries see the **current cooperation** with other **cultural institutions** (7.05) and **educational institutions** (6.76) quite intensive. Intensity of cooperation with **private sector** (4.90), **professional institutions** (5.42), **public sector** (6.33) and **public-private acting sector** (4.61) was rated as an **average**.

The cooperation with **all stakeholder sectors** is seen as **important** (> 6.50).

The respondents from **cultural institutions** consider **influence level** of **all stakeholder sectors** as **high** (> 7.00)

4.3.2.2. Expectations and needs of educational institutions

Austria

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 2 cultural institutions, 3 educational institutions, and 30 respondents from private and one respondent from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **educational institutions** see the **current cooperation** with **private sector** (6.50) quite **intensive**. Intensity of cooperation with **cultural institutions** was rated as an **average** (5.33) and cooperation with other **educational institutions** (4.33), **professional institutions** (3.67), and **public sector** (2.67) and with **public-private acting sector** (1.67) is seen as **extensive** in their opinion.

In comparison, the **importance of cooperation** with **almost all stakeholder sectors** was rated **high** (> 7.00), but respondents from educational institutions think that **importance of cooperation** with other **educational institutions** is **slightly higher** than average (6.33).

The respondents from **educational institutions** consider **influence level** of other **educational institutions** (7.67) and **private sector** (8.67) as **high**. They evaluated the influence level of other sectors as average.

Czechia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 7 cultural institutions, 12 educational institutions, and 56 respondents from private and 3 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **educational institutions** see the **current cooperation** with **cultural institutions** (6.70) other **educational institutions** (7.50) quite **intensive**. Intensity of cooperation with **private sector** (5.67), **professional institutions** (5.50), **public sector** (5.91) and **public-private acting sector** (4.70) was rated as an **average**.

In comparison, the **importance of cooperation** with **almost all stakeholder sectors** was rated **high** (> 6.50), except cooperation with **public-private acting sector**, which is thought to be **average important** (5.80).

The respondents from **educational institutions** consider **influence level** of other **educational institutions** (6.58) and **private sector** (7.58) as **high**. **Cultural institutions** (6.33), **professional institutions** (5.20), **public sector** (6.45) and **public-private acting sector** have an **average influence** in their opinion.

Germany

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 1 cultural institution, 1 educational institution, and 41 respondents from private and two respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **educational institutions** see the **current cooperation** with **almost all stakeholder** sectors, except **educational** sector, quite **intensive** (> 6.00). Intensity of cooperation with other **educational institutions** (2.00) is seen as **extensive** in their opinion. The data about intensity of cooperation is missing.

The **importance of cooperation** with **almost all stakeholder sectors** was rated **high** (> 7.00), but respondents from educational institutions think that **importance of cooperation** with **private sector** is none.

Data about respondents answer on rating the **influence level** of all stakeholder sectors is not available.

Italy

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 0 educational institution, and 4 respondents from private and 6 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The sample does not contain respondents from educational institutions, because all stakeholder sectors experienced crisis due to **COVID-19 pandemic**. It is planned to repeat the research after pandemics when more respondents will participate to get more accurate results from the survey.

Poland

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 7 educational institutions, and 21 respondents from private and 6 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **educational institutions** see the **current cooperation** with **cultural institutions** (8.33), other **educational institutions** (7.83) and **professional institutions** (7.17) quite **intensive**. Intensity of cooperation with **public sector** (5.00) was rated as an **average** and cooperation with **private sector** (3.50) and **public-private acting sector** (2.40) is seen as **extensive** in their opinion.

In comparison, the **importance of cooperation** with **almost all stakeholder sectors** was rated **high** (> 6.50), only cooperation with **public-private acting sector** (6.17) is seen as **average important**.

The respondents from **educational institutions** consider **influence level** of **cultural institutions** (9.80), **educational institutions** (9.40) and **public sector** (6.80) as **high**. Influence level of **professional institutions** (5.75) was evaluated as an **average** and influence of **private sector** (3.40) and **public-private acting sector** (4.40) is **low** in their opinion.

Slovenia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 6 cultural institutions, 1 educational institution, and 46 respondents from private and eight respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **educational institutions** see the **current cooperation** with **professional institutions** (8.00) and **public-private acting sector** (7.00) quite **intensive**. Intensity of cooperation with **cultural institutions** was rated as an **average** (5.00) and cooperation with other **educational institutions** (3.00), **private sector** (3.00) and **public sector** (3.00) is seen as **extensive** in their opinion.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (10.00).

The respondents from **educational institutions** consider **influence level** of **each stakeholder sector** as **high** (10.00).

Summary

The respondents from **educational institutions** from all CerDee countries see the **current cooperation** with **cultural institutions** (7.05), with other **educational institutions** (6.74) quite **intensive.** (6.50). Intensity of cooperation with **private sector** (5.00), **professional institutions** (6.05) and **public sector** (5.14) was rated as an **average** and cooperation with **public-private acting sector** (3.95) is seen as **extensive** in their opinion.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (> 6.50).

The respondents from **educational institutions** consider **influence level** of **cultural institutions** (7.24), other **educational institutions** (7.57) and **public sector** (6.60) as **high**. They evaluated the influence level of other sectors as average.

4.3.2.3. Expectations and needs of private sector

Austria

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 2 cultural institutions, 3 educational institutions, and 30 respondents from private and one respondent from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **private sector** see the **current cooperation** with other **entrepreneurs (private sector)** as an **average** (5.00) and cooperation with **other sectors** is seen as **extensive** in their opinion (< 4.00).

The cooperation with **professional institutions** was evaluated as **important** (6.03), with **educational institutions** (4.90), and **public sector** (5.07) as average, and cooperation with **cultural institutions** (4.21), **private sector** (4.46) and **public-private acting sector** (4.46) as **not important**.

The respondents from **private sector** consider **influence level** of **almost each stakeholder sector** as **low**; only influence level of **private sector** and **professional institutions** as average.

Czechia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 7 cultural institutions, 12 educational institutions, and 56 respondents from private and three respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **private sector** see the **current cooperation** with **educational institutions** (4.80) and **private sector** (5.41) as an **average** and cooperation with **cultural institutions** (4.33), **professional institutions** (3.71), **public sector** (3.04) and **public-private acting sector** (3.25) is seen as **extensive** in their opinion.

The cooperation with **educational institutions** (4.73), **private sector** (4.77) **professional institutions** (4.64) was evaluated as **average important** and cooperation with **cultural institutions** (4.46), **public sector** (4.48) and **public-private acting sector** (4.22) is thought to be **not important**.

The respondents from **private sector** consider **influence level** of **almost all stakeholder sectors** as **low**, except **private sector** (5.43), whose influence was rated as an **average**.

Germany

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 1 cultural institution, 1 educational institution, and 41 respondents from private and two respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **private sector** see the **current cooperation** with **all stakeholder sectors** as **extensive** (< 4.50).

The cooperation with **cultural institutions** (5.37) and **public sector** (4.88) was evaluated as **average important**, and cooperation with **educational institutions** (4.35), **private sector** (4.37), **professional institutions** (4.07) and **public-private acting sector** (4.32) was rated as **not important**.

The respondents from **private sector** consider **influence level** of **cultural institutions** (5.33, **private sector** (4.79, **public sector** (4.75) and **public-private acting sector** (4.73) as **an average**; only influence level of **educational institutions** and **professional institutions** is seen as **low**.

Italy

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 0 educational institution, and 4 respondents from private and six respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **private sector** see the **current cooperation** with **almost all stakeholder sectors** as an **average**, except cooperation with **educational institutions** is seen as **extensive** in their opinion (4.25).

In comparison, the **importance of cooperation** with **almost all stakeholder sectors** was rated as an **average**, only cooperation with **public sector** is considered **important** (6.75).

The respondents from **private sector** consider **influence level** of almost all **stakeholder sectors** as an **average**, just influence level of **public sector** is seen as **low** (3.50).

Poland

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 7 educational institutions, and 21 respondents from private and six respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **private sector** see the **current cooperation almost all stakeholder sectors** as **extensive** (< 4.50), only cooperation with **private sector** (4.84) was rated as an **average**.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **low** (< 4.50).

The respondents from **educational institutions** consider **influence level** of **almost all stakeholder sectors** as an **average**, only **educational institutions** (4.29) are thought to have **small influence**.

Slovenia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 6 cultural institutions, 1 educational institution, and 46 respondents from private and 8 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **private sector** see the **current cooperation** with other **entrepreneurs (private sector)** as an **average** (4.89) and cooperation with **other sectors** is seen as **extensive** in their opinion (< 4.50).

The cooperation with **all stakeholder sectors** was evaluated as **not important** (< 4.50).

The respondents from **private sector** consider **influence level** of **each stakeholder sector** as an **average**.

Summary

The respondents from **private sector** from all CerDee countries see the **current cooperation** with other entrepreneurs from **private sector** (4.99) as **average intensive**. Cooperation with other **stakeholder sectors** is seen as **extensive** (< 4.50).

The cooperation with other entrepreneurs from **private sector** (4.63) was evaluated as **average important**, and cooperation with **other stakeholder sectors** is seen as **not important**.

The respondents from **private sector** consider **influence level** of **cultural institutions** (4.87), **educational institutions** (4.54), **private sector** (5.07), **and professional institutions** (4.87) as **an average.** Influence level of **public sector** (4.39) and **public-private acting sector** (4.39) is seen as **low**.

4.3.2.4. Expectations and needs of public sector

Austria

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 2 cultural institutions, 3 educational institutions, and 30 respondents from private and one respondent from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondent from **public sector** sees the **current cooperation** with **all stakeholder sectors as extensive** (< 4.50), but the data about intensity of cooperation with private sector is missing.

In comparison, the **importance of cooperation** with **cultural institutions** (10.00), **private sector** (10.00) and **public sector** (7.00) **was rated high** (> 8.00). The respondent thinks that importance of cooperation with **educational institutions** (5.00) and **public-private acting sector** (5.00) is **average**. On the other hand, he thinks that **cooperation with professional institutions** (1.00) is **not important**.

The respondent from **public sector** considers **influence level** of **public-private acting sector** as **high** (6.00). He evaluated the **influence level of cultural institutions** (2.00), **educational institutions** (4.00), **private sector** (1.00) and **public sector** (1.00) as **low**. The data about his opinion about influence level of professional institutions is missing.

Czechia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 7 cultural institutions, 12 educational institutions, and 56 respondents from private and three respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **public sector** see the **current cooperation** with **cultural institutions** (9.00), **educational institutions** (8.00), **private sector** (7.00) and **public-private acting sector** (7.67) quite **intensive**. Intensity of cooperation with **professional institutions** (4.00) and **public-private acting sector** (3.67) was rated as **low**.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (> 7.50).

The respondents from **public sector** consider **influence level** of **each stakeholder sector** as **high** (> 8.00).

Germany

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 1 cultural institution, 1 educational institution, and 41 respondents from private and two respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondent from **public sector** sees the **current cooperation** with **cultural institutions** (7.00), **educational institutions** (6.00), **public sector** (8.00) and **public-private acting sector** (8.00) as **extensive**, intensity of cooperation with **professional institutions** (4.50) was rated as an **average**, and with **private sector** (3.00) was rated low.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (> 7.00).

The respondent from **public sector** considers **influence level** of **cultural institutions** (7.00), **educational institutions** (7.00), **private sector** (7.00) and **professional institutions** (8.00) as **high**. The influence level of **public sector** (5.50) and **public-private acting sector** (5.50) was rated as an **average**.

Italy

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 0 educational institution, and 4 respondents from private and 6 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **public sector** see the **current cooperation** with **all stakeholder sectors** as **intensive** (> 6.50).

The **cooperation** with **all stakeholder sectors** was rated as **important** (> 7.00).

The respondents from **public sector** consider **influence level** of **each stakeholder sector** as **high** (> 6.50).

Poland

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 3 cultural institutions, 7 educational institutions, and 21 respondents from private and 6 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **public sector** see the **current cooperation almost all stakeholder sectors** as **extensive** (< 4.50), only cooperation with **private sector** (4.84) was rated as an **average**.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **low** (< 4.50).

The respondents from **public sector** consider **influence level** of **almost all stakeholder sectors** as an **average**, only **educational institutions** (4.29) are thought to have **small influence**.

Slovenia

It is necessary to keep in mind the structure of respondents' sample. The structure is following: 6 cultural institutions, 1 educational institution, and 46 respondents from private and 8 respondents from public sector. The results of the research would be more accurate with bigger sample of the respondents.

The respondents from **public sector** see the **current cooperation** with **cultural institutions** (6.50), **private sector** (7.00), **professional institutions** (6.33) and other members of **public sector** (7.25) quite **intensive**. Intensity of cooperation with **educational institutions** and **public-private acting sector** was rated as an **average** (4.88 and 4.57).

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (> 8.00).

The respondents from **public sector** consider **influence level** of **each stakeholder sector** as **high** (> 7.00).

Summary

The respondents from **public sector** from all CerDee countries see the **current cooperation** with **cultural institutions** (7.09), **private sector** (6.57) and **public sector** (6.75) as **high**. Cooperation with **educational institutions** (6.29), **professional institutions** (6.23) and **public-private acting sector** (5.90) was rated as an **average intense**.

In comparison, the **importance of cooperation** with **all stakeholder sectors** was rated **high** (< 7.50).

The respondents from **public sector** consider **influence level** of **all stakeholder sectors** as **high** (> 7.00).

4.4. Marketing activities

Marketing is one of the most important processes in company. Its aim is to get the knowledge, influencing and satisfying customer's needs and wishes, and achieving goals of the organization in an effective way. That is why all companies choose their marketing activities properly.

This part of survey contains questions about the platforms that companies in CerDee countries use to do their marketing strategies and about planned ways of marketing in the future. It also includes questions regarding information about who is responsible for the marketing activities of the companies. Respondents from Austria, Czechia, Germany, Italy, Poland and Slovenia were asked about the benefits of using social networks and about the distribution channels that companies currently use and about the channels, they plan to use in the following years. In the following part of this chapter are more detailed information about individual countries.

4.4.1. Marketing activities in Austria

Nowadays, in the ceramic and porcelain sector in Austria, is mostly used marketing through the **own website** (90 %). Many companies use **social media** for their marketing activities such as **Facebook** (60 %), **Instagram** (57 %) or **YouTube** (7 %). Very common is also **advertising in traditional media**, mostly in press (57 %). There are some other ways used for marketing in companies such as **online advertising** (30 %), **point-of-sale promotions** (13 %) or a **loyalty program** (7 %). **Figure 30 (Austria)**)

Companies plan to improve their **own websites** (63 %). Using of social media is important; the plan for the future marketing activities includes the use of **YouTube** (17 %), **Instagram** (50 %) and **Facebook** (40 %). **Advertising in TV** (10 %), **radio** (6 %) and **press** (40 %) is planned such as **online advertising** (20 %). Figure **31 (Austria)**).

Own forces of the company (70 %) are mostly responsible for the marketing activities. Only 20 % of entrepreneurs in Austria use **local**, **regional** or **national support (Figure 32 (Austria)).** Respondents mostly **do not participate in the marketing activities** of the overall craft development (41 %) and only few of them do (24 %). Almost everyone is interested in **participating in a marketing campaign** to promote creative sector (73 %). **Figure 33 (Austria)).**

Marketing activities on social networks are mostly a **promotion of the product** (70 %) or a **promotion of the company** (57 %). Very common is **offering exclusive promotions** (10 %) and **technical information** (10 %). **(Figure 34 (Austria)**). It is surprising that 20% of respondents do not use the social media for marketing. Through the social media companies **get new customers** (60 %) and improve their **reputation and brand image** (57 %), they **get feedback from clients and public** (26 %) and **collect information about their customers** (13 %). Some of the companies have **closed sales operations through the social media** (10 %). **Figure 35 (Austria)).**

Markets, **fairs** (70 %) and **own brick-and-mortar store** (50 %) are the most common distribution channels used in Austria. Around 30 % of companies use **retail**. **Online store** (13 %) is also used **Figure 36 (Austria)).**

In the future, it is planned greater use of **markets**, **fairs** (70 %), own **brick-and-mortar stores** (50 %) and **retail** (43%). Other channels planned for the distribution are own online store (30 %), multi-brand online platforms (7 %) and some others (37 %). **(Figure 37 (Austria)).**

4.4.2. Marketing activities in Czechia

Nowadays, in the ceramic and porcelain sector in the Czech Republic, is mostly used marketing through the **own website** (77 %), social media such as **Facebook** (68 %), **Instagram** (41 %) or **YouTube** (5 %) are also common. There are some other ways used for marketing in companies such as online **advertising and advertising in traditional media** (press). **(Figure 30 (Czechia))**.

Companies plan more of marketing through the **own website** (29 %) and **point-of-sale promotions** (18 %). It also planned greater use of social media; the plan for the future marketing activities includes the use of **YouTube** (15 %), **Instagram** (9 %) and **Facebook** (5 %). **Advertising in TV** (4 %) and **press** (8 %) is also planned **Figure 31 (Czechia)**).

Own forces of the company (82 %) are mostly responsible for the marketing activities. Only 9 % interviewed entrepreneurs in Czechia use **specialists or specialized agencies Figure 32 (Czechia))**. Respondents mostly **do not participate in the marketing activities** of the overall craft development (46 %) and only few of them do (38 %). Lots of respondents is interested in **participating in a marketing campaign** to promote creative sector (68 %) **(Figure 33 (Czechia)).**

Marketing activities on social networks are mostly a **promotion of the product** (66 %) or a **promotion of the company** (48 %). Very common is **offering trend information** (14 %), **technical information** (21 %), **exclusive promotions** (18 %) and **post-sales information** (13 %) **Figure 34 (Czechia))**. Through the social media, companies improve their **reputation and brand image** (52 %); they **get new customers** (55 %), **get feedback from clients and public** (43 %) and **collect information about their customers** (5 %). Some of the companies have **closed sales operations through the social media** (27 %) **Figure 35 (Czechia))**.

Markets and **fairs** (52 %) are the most common distribution channels. Around 20 % of companies use **own brick-and-mortar store**. Online distribution channels such as **own online store** (25 %) and **multi-brand online platform** (14 %) are also used by companies from this sector in the Czech Republic **Figure 36 (Czechia))**.

Greater use of **own online stores** (30 %) and **markets and fairs** (27 %) **is planned for the future**. Other channels planned for the distribution are **own brick-and-mortal stores** (21 %) and **retail** (14 %) **Figure 37 (Czechia)**).

4.4.3. Marketing activities in Germany

Nowadays, in the ceramic and porcelain sector in Germany, is mostly used marketing through the **own website** (80 %). Very common is also **advertising in traditional media**, mostly in press (63 %). Many companies use **social media** for their marketing activities such as **Facebook** (51 %), **Instagram** (34 %) or **YouTube** (20 %). There are some other ways used for marketing in companies such as **online advertising** (51 %), **point-of-sale promotions** (46 %) or **loyalty programs** (12 %) **(Figure 30 (Germany)**).

Entrepreneurs in Germany plan to improve their **own websites** (32 %). Using of social media is important; the plan for the future marketing activities includes the greater use of **YouTube** (24 %), **Instagram** (22 %) and **Facebook** (15 %). **Online advertising** (27 %) is also planned such as **advertising in press** (20 %) and other traditional media **Figure 31 (Germany)**).

Own forces of the company (63 %) are mostly responsible for the marketing activities. Only 8 % of entrepreneurs in Germany use **local**, **regional** or **national support Figure 32 (Germany))**. A half of respondents **participate in the marketing activities** of the overall craft development (50

%) and a third of them do not (31 %). Almost everyone is interested in **participating in a marketing campaign** to promote the creative sector (93 %) **Figure 33 (Germany)**).

Marketing activities on social networks are mostly a **promotion of the product** (56 %) or a **promotion of the company** (44 %). Very common is **offering exclusive promotions** (34 %) and **technical information** (17 %) **Figure 34 (Germany)**). Through the social media companies improve their **reputation and brand image** (49 %) and **get new customers** (44 %), they **get feedback from clients and public** (27 %) and **collect information about their customers** (12 %). Some of the companies have **closed sales operations through the social media** (10 %). It is surprising that in this modern world 39 % of respondents do not use the social media for marketing **(Figure 35 (Germany)).**

Own brick-and-mortar store (71 %) and **markets**, **fairs** (63 %) are the most common distribution channels used in Germany. Around 30 % of companies use **retail**. **Online stores** (17 %) and multi-brand online platforms are also used **Figure 36 (Germany)**).

In the future it is planned greater use of own brick-and-mortar stores (59 %), markets, fairs (46 %) and own online store (29 %). Other channels planned for the distribution are retail (24 %), multi-brand online platforms (12 %) and some others (22 %) **Figure 37 (Germany)**).

4.4.4. Marketing activities in Italy

The sample of Italy contains only four respondents (n). It was impossible to get more respondents from private sector in Italy, because especially entrepreneurs experienced crisis due to **COVID-19 pandemic**. It is planned to repeat the research after pandemics when more respondents will participate to get results that are more accurate from the survey. Therefore, there are just briefly summarized data about Italian entrepreneurs that took part in the survey in following paragraphs.

Nowadays, in the ceramic and porcelain sector in Italy, are mostly used own websites for marketing activities, then it is **Facebook** and **Instagram**. There are some other ways used for marketing such as **advertising in traditional media** – press and TV **Figure 30 (Italy)**).

These four companies plan to do **marketing activities on their own websites** and point-of-sale promotions in the future. The plan for the future marketing activities includes also **Instagram** and **some (Figure 31 (Italy)**).

Marketing activities on social networks are mostly a **promotion of the product** or a **promotion of the company**. Then it is **offering technical information, post-sales information**, improving the **reputation and brand image** and **collecting information about their customers (Figure 35 (Italy)**).

4.4.5. Marketing activities in Poland

Nowadays, in the ceramic and porcelain sector in Poland, are mostly used **own websites** for marketing activities (90 %). Social media such as **Facebook** (86 %), **Instagram** (57 %), **YouTube** (38 %) and some others (24 %) are also used. There are some other ways used for marketing in companies such as **advertising in traditional media** – press (33 %), TV (39 %) and radio (33 %). **Online advertising** is also very common (52 %). For marketing activities are also used **point-of-sale promotions** (38 %) and **loyalty program** (14 %) **(Figure 30 (Poland)**).

Companies plan to do **marketing activities on their own websites** (33 %) and **point-of-sale promotions** (24 %) in the future. Using of social media is important; the plan for the future marketing activities includes **Facebook** (19 %), **Instagram** (19 %), **YouTube** (19 %) and **some others** (24 %). **Loyalty program** (24 %), **online advertising** (14 %) and **traditional advertising** is also planned **(Figure 31 (Poland)**).

Own forces of the company (71 %) are mostly responsible for the marketing activities. 23 % interviewed entrepreneurs in Poland use **specialists and specialized agencies** and the rest use local, regional or national support bodies (5 %) **Figure 32 (Poland)**). Respondents mostly **participate in the marketing activities** of the overall craft development (60 %) and only few of them do not (10 %) the rest is undecided (30 %). Almost 60 % of them are interested in **participating in a marketing campaign** to promote creative sector **Figure 33 (Poland)**).

Marketing activities on social networks are mostly a **promotion of the product** (81 %) and a **promotion of the company** (76 %). Very common is **offering exclusive promotions** (38 %), **technical information** (14 %) and **post-sales information** (29 %) **Figure 34 (Poland)**). Through the social media, companies improve their **reputation and brand image** (76 %), they **get new customers** (33 %), **get feedback from clients and general public** (48 %) and also **collect information about their customers** (25 %) **Figure 35 (Poland)**).

Markets, fairs (62 %) and **wholesales** (57 %) are the most common distribution channels. **Own brick-and-mortar stores** (48 %), **online stores** (43 %), **multi-brand online platforms** (29 %) and **retails** (29 %) are also used often **Figure 36 (Poland))**.

Greater use of **own online stores** (61 %), **markets and fairs** (48 %) **is planned for the future**. Other channels planned for the distribution are **own brick-and-mortar stores** (43 %), **wholesales** (38 %) and **multi-brand online platforms** (19 %) **Figure 37 (Poland))**.

4.4.6. Marketing activities in Slovenia

Nowadays, in the ceramic and porcelain sector in Slovenia, are mostly used social media such as **Facebook** (78 %), **Instagram** (72 %), **YouTube** (13 %) or the others (15 %). Marketing through the **own website** (70 %), **online advertising** (65 %) and **point-of-sale promotions** (50 %) are also very common. There are some other ways used for marketing in companies such as **advertising in traditional media** (radio, print, TV) or a **loyalty program** (7 %). **Figure 30 (Slovenia)**).

Companies plan more **online advertising** (37 %) and to do **marketing activities on their own websites** (39 %) in the future. Using of social media is important; the plan for the future marketing activities includes the use of **YouTube** (26 %), **Instagram** (20 %) and **Facebook** (15 %). **Advertising in TV** (7 %), **radio** (4 %) and **press** (11 %) is also planned **Figure 31 (Slovenia))**.

Own forces of the company (94 %) are mostly responsible for the marketing activities. Only two from 46 interviewed entrepreneurs in Slovenia use **local**, **regional** or **national support Figure 32 (Slovenia))**. Respondents mostly **do not participate in the marketing activities** of the overall craft development (57 %) and only few of them do (28 %). Almost everyone is interested in **participating in a marketing campaign** to promote creative sector (84 %) **Figure 33 (Slovenia)**).

Marketing activities on social networks are mostly a **promotion of the product** (83 %) or a **promotion of the company** (48 %). Very common is **offering trend information** (41 %), **technical information** (20 %), **exclusive promotions** (11 %) and **post-sales information** (11 %) **Figure 34 (Slovenia)**). Through the social media, companies improve their **reputation and brand image** (72 %); they **get new customers** (67 %), **get feedback from clients and public** (67 %) and **collect**

information about their customers (24 %). Some of the companies have **closed sales operations through the social media** (37 %) **Figure 35 (Slovenia)**).

Retail (57%), **markets** and **fairs** (54 %) are the most common distribution channels. Around 30 % of companies use **own brick-and-mortar store**. Online distribution channels such as **own online store** (28 %) and **multi-brand online platform (**13 %) are also used **Figure 36 (Slovenia)).**

Greater use of **own online stores** (50 %) and **multi-brand online platforms** (35 %) **is planned for the future**. Other channels planned for the distribution are **markets**, **fairs** (33 %) and **retail** (28 %) **(Figure 37 (Slovenia)).**

4.4.7. Summary of marketing activities used in CerDee countries

The sample of all CerDee countries contains **198 respondents** (n). Not all the respondents answered every question; therefore, there are fewer responses in several cases of particular question (n ≤ 198).

Nowadays, in the ceramic and porcelain sector in the CerDee countries, is mostly used marketing through the own website (80 %), social media such as Facebook (68 %), Instagram (52 %) or YouTube (14 %) are also common. There are some other ways used for marketing in companies such as online advertising (43 %) and advertising in traditional media (press 33 %, TV 10 %, radio 9 %). (**Figure 28 (all CerDee countries**)). The greatest use of YouTube is visible in Poland (38 %), where are also the other social media used more, then in other CerDee countries.

Companies plan more of marketing through the own website (38 %), online advertising (21 %) and point-of-sale promotions (20 %). It also planned greater use of social media; the plan for the future marketing activities includes the use of Instagram (22 %), YouTube (20 %) and Facebook (16 %). Advertising in press (15 %) and TV (6 %) is also planned **(Figure 29 (all CerDee countries)**). Planning of a greater use of social and traditional media is most noticeable in Austria, where the highest percentage in all the planned platforms for marketing activities.

Own forces of the company (78 %) are mostly responsible for the marketing activities. Only 10 % interviewed entrepreneurs from CerDee countries use specialists or specialized agencies and 4 % do their marketing with help from local, national or international bodies **Figure 30 (all CerDee countries)).** Some respondents do not participate in the marketing activities of the overall craft development (41 %) and some of them do (39 %). Lots of respondents is interested in participating in a marketing campaign to promote creative sector (75 %) and only few of them is not (8 %) **Figure 31 (all CerDee countries**)). Own forces are mostly responsible for the marketing activities in all CerDee countries, mostly in Slovenia (94 %). There is the highest percentage of using specialists or specialized agencies in Poland. The highest number of using local, national or international support is in Austria.

Marketing activities on social networks are mostly a promotion of the product (71 %) or a promotion of the company (52 %). Very common is offering trend information (18 %), technical information (18 %), exclusive promotions (20 %) and post-sales information (11 %) **Figure 32 (all CerDee countries))**. Through the social media, companies improve their reputation and brand image (60 %); they get new customers (57 %), get feedback from clients and public (43 %) and collect information about their customers (16 %). Some of the companies have closed sales operations through the social media (21 %) **Figure 33 (all CerDee countries)).** It is clear that online marketing is useful these days because of the increasing number of users of social media and internet. All the countries use social networks to do many diverse marketing activities there. It was surprising when 39 % of respondents from Germany answered that they do not use any social media.

Markets and fairs (59 %) are the most common distribution channels. Around 40 % of companies use own brick-and-mortar store. Online distribution channels such as own online store (24 %) and multi-brand online platform (12 %) are also used by companies from this sector in the CerDee countries. **Figure 34 (all CerDee countries)**). While markets and fairs are very common distribution channels in all CerDee countries, own brick-and-mortar store is the most popular in Germany (71 %). Wholesale is used more often in Germany in comparison to the other CerDee countries (57 %).

Greater use of markets and fairs (41 %) and own online stores (39 %) is planned for the future. Other channels planned for the distribution are own brick-and-mortal stores (35 %) and retail (25 %). **Figure 35 (all CerDee countries)**). The situation shows that greater use of online stores will be needed for companies to sell their products. Greater use of online stores is planned in all the CerDee countries, mostly in Poland and Slovenia. In Germany, it is planned to use wholesale more.

5. Strengths and weaknesses

Strengths and weaknesses are factors that an organization can influence or even change. These factors are based on the internal environment of the company. It is good to analyse and know the strengths and weaknesses to choose an effective strategy for the following years. It is good to use the strengths and to reduce weaknesses to improve the business or services. Analysing these factors allows better decision making and planning.

5.1. Strengths

The competitive advantages of CerDee countries relating to the ceramic and porcelain sector were obtained from the answers. To identify individual strengths of each country it is necessary to compare the acquired data between these countries.

The benefits for each country were identified in various aspects such as the current and planned marketing strategy, education of employees, financial situation, expectations and needs of entrepreneurs or stakeholders, the future of students and support for their development. More information about strengths of individual CerDee countries is in the following paragraphs.

5.1.1. Strengths of the ceramic and porcelain sector in Austria

In this current modern world is good the fact that companies plan more **online advertising** and to do **marketing activities on their own websites** in the future. Using of social media is important; the plan for the future marketing activities includes the use of **own websites (63%), Instagram (50%)** and **Facebook (40%)**. Greater use of **own online stores** and **multi-brand online platforms** is also planned for the future. Austria plans greater development in modern marketing than the other CerDee countries.

This fact was also mentioned in Question 18. One of the respondents answered: "I see the biggest improvement in the fact that ceramic sector in Austria is experiencing new growth due to wider use of the social media. Establishing of the social media has purpose in general!"

Ceramic and porcelain sectors in Austria cooperate with educational institutions (70 %) the most in comparison to the other CerDee countries. This cooperation includes internships, workshops, seminars and some other courses with students of bachelor's, master's and other degrees. Cooperation is in the form of teaching, this way is the most represented in all the answers.

A quite new phenomenon in Austrian ceramic culture are co-working spaces like **„rami-ceramics"**, **„potteria"** and **„keramik tonhalle"**. They offer courses for various ceramic techniques (for beginners and advanced ceramists as well) and it is possible to rent a studio place there.

The Ceramic School is an online portal founded to inspire, connect and teach ceramic and business techniques. The ceramic school provides ceramic courses online to the masses, from all around the world to follow enthusiasts everywhere.

5.1.2. Strengths of the ceramic and porcelain sector in Czechia

One of the strengths of porcelain and ceramics sector in Czechia is a **big portion of respondents working actively on employee or self-training** (82%). Although Czechia is a small country the amount of improving workers is higher than in Italy and Austria. The percentage is similar to Slovenia and Germany.

Students plan to **settle down at the same place they come from** (67 %) and become a co-owner of a small studio in Czechia. This percentage is higher than in Germany and almost the same as in Slovenia and Italy.

The **intensity of cooperation** with **cultural institutions**, **educational institutions**, **private sector** and **public-private acting sector** was rated **higher**. The **importance of cooperation** with Czechian **cultural institutions** and **public sector** is seen **more important** than in the other CerDee countries.

The **educational sector** is actually comparatively **well developed in the Czech Republic**. There are **five university studios** directly dealing with ceramic/porcelain and its design and other focused on design in the Czech Republic. On the **secondary level of education**, we have indicated over 10 school connected to ceramic/porcelain production or design. The number of educational institutions is **the highest in Czechia** in comparison to the other CerDee countries.

In this current modern world is good the fact that companies plan to do more of **marketing activities on their own websites** in the future. Using of social media is important; the plan for the future marketing activities includes the use of **YouTube, Instagram** and **Facebook**. Greater use of **own online stores** and **multi-brand online platforms** is also planned for the future. This helps the entrepreneurs to promote their products and the company, to offer technical and trend information. They can also get new customers and feedback from the current customers.

For the marketing activities are mostly responsible **own forces of the company** which means lower costs for the entrepreneurs.

The number of **subjects in private sector** is the second highest in the Czech Republic (after Germany), that is remarkable because this state is quite small. Porcelain production in the Czech Republic is divided into few relatively **big producers** in Karlovy Vary region and Dubí. There are also few **smaller producers**, which usually cover niche markets. Further, there are many of potters usually **self-employed** all over the Czech Republic.

The amount of subjects **in public sector** is also one of the highest in the Czech Republic in comparison to the other CerDee countries. Karlovy Vary region supports traditional industries – glass and porcelain production. The regional ecosystem consists of most important stakeholders (education, tourism and spa, producers, events etc.). There is a Karlovy Vary Business Development Agency runs a **Platform of Traditional Industry**, where it tries to cooperate with important business. Some municipalities in the country try to support the traditional products and their production and they work with the heritage connected to it.

5.1.3. Strengths of the ceramic and porcelain sector in Germany

One of the strengths of porcelain and ceramics sector in Germany is a big portion of respondents working actively on employee or self-training (84 %). The number of ceramists who constantly improve their abilities in Germany is higher than in all of the CerDee counties except Poland.

There is the greatest use of advertising in press in Germany in comparison to the other CerDee countries. It is planned to extend the advertising in newspapers by 20 %.

In this current modern world, the fact that companies plan more of **online advertising** and to do **marketing activities on their own websites** in the future is good. Using of social media is important; the plan for the future marketing activities includes the second highest usage of **YouTube** and of **online advertising**. Greater use of **own brick-and-mortar stores** is planned for the future.

There are **377 private institutions** in regions of Germany, which took part in the research, this number is the highest from all of the CerDee countries, but it is necessary to mention that Germany is the biggest from all of these states. The product range **includes everything** from simple utility ceramics (earthenware crockery) to high-class porcelain objects (tableware, art objects) including all possible **fields of usage** such as tiled stoves, roof tiles, floor tiles, bathroom furniture such as sinks, decorative objects for all purpose, jewellery, and tableware of all kind.

5.1.4. Strengths of the ceramic and porcelain sector in Italy

The respondents see the overall situation in ceramic sector more positive than negative and 75 % expect a growth of the sector in next 5 years. Half of the respondents (50 %) consider the cooperation in this sector as a sufficient, 25 % as insufficient, even though all of the respondents are members of some association or organization in ceramic sector in Italy

They plan to settle down at the same place they come from (45 %). Only 18 % of the students would like to live somewhere else. That goes hand in hand with expected growth of the sector in next 5 years. This percentage is higher than in Germany and it is almost the same as in Poland, Slovenia and the Czech Republic.

Intensity of current cooperation with all stakeholder sectors was rated higher in Italy in comparison to other CerDee countries. The cooperation with all Italian stakeholder sectors is thought to be more important than in the other CerDee countries. The influence level of each is considered greater than the average from all countries.

The number of cultural institutions is the highest in Italy from all the CerDee countries. The Italian association of Town of ceramic tradition AICC gives a wide idea of the quantity of ceramic museums and institutions are active in Italy. In the northern part of Italy (CERDEE area), beside the International Museum of Ceramics in Faenza, partner of CERDEE, there are ceramics Museums in all the regions. In Faenza, there are also private museums such as Museo Tramonti, Museo Zauli and Museo Gatti that have been found over the heritage of important artists. The cultural associations have established collaboration with the MIC, such as the FACC – Faenza Art Ceramic Centre that is also collaborating in CERDEE.

Although there are only three professional associations in Italy, they support companies in ceramic and porcelain sector very well. In Faenza, there are different professional associations, with different roles. Confartigianato and CNA for the ceramic sector, represent an important support for the ceramic companies, the workshops and the studios, in all phases of their activity (development of the business idea, the establishment, financing, administrative requirements, the implementation of technologies and market positioning). In Faenza, the Ente Ceramica has successfully carried out important activities including legal protection, promotion and education in art ceramics through the organization of exhibitions, events, initiatives and the production of catalogues and other publications.

For the marketing activities are mostly responsible own forces of the company which means lower costs for the entrepreneurs.

5.1.5. Strengths of the ceramic and porcelain sector in Poland

One of the strengths of porcelain and ceramics sector in Poland is a big portion of respondents working actively on employee or self-training (95%). The amount of improving workers is the highest in Poland from all of the CerDee countries.

Students plan to settle down at the same place they come from (73 %) and become a co-owner of a small studio in Poland. That goes hand in hand with expected **growth of the sector in next 5 years.** This percentage is higher than in Italy or Germany.

Intensity of current cooperation with **almost all Polish stakeholder sectors** was rated **higher** than the CerDee mean. Importance of cooperation with Polish **cultural institutions**, **professional institutions** and **public sector** the **cooperation** is seen **more important** than in the other CerDee countries. **Influence level** of **cultural institutions**, **educational institutions**, **professional institutions** and **public sector** is seen **bigger** than is the average from all countries.

In this current modern world is good the fact that companies plan more **online advertising** and to do **marketing activities on their own websites** in the future. Using of social media is important; the plan for the future marketing activities includes the use of **YouTube, Instagram** and **Facebook**. Greater use of **own online stores** and **multi-brand online platforms** is also planned for the future.

For the marketing activities are mostly responsible **own forces of the company** which means lower costs for the entrepreneurs.

The number of **professional associations** is the highest in Poland. Within the desk research, there were indicated 13 professional associations. We have identified two associations of individual ceramists; each of them has around 50 members. They operate on a regional scale and focus on organising exhibitions, presentations and workshops. There is one industry organisation - it brings together almost 30 producers of ceramics from Boleslawiec region. Its aim is to protect the quality and reputation of Bolesławiec pottery but its activity is rather symbolic.

The lock-down has not affected the ceramic industry in the Bolesławiec region as much as everybody expected. It has recovered quite quickly and many smaller manufactures have even benefited from increased online sales.

Ceramics as a hobby is quite popular in Poland. Almost in every larger town, there is a public **cultural institution**, which offers afternoon classes in ceramics. In Bolesławiec, there are three institutions that promote ceramics: International Centre for Ceramics, Museum of Ceramics, and Youth Culture Centre. Local producers (access to materials, expertise, workplaces etc.) somehow support all of them.

5.1.6. Strengths of the ceramic and porcelain sector in Slovenia

Students plan to settle down at the same place they come from (43 %) and become a co-owner of a small studio in Slovenia. That goes hand in hand with expected **growth of the sector in**

next 5 years. This percentage is higher than in Italy or Germany and it is almost the same as in Poland and the Czech Republic.

The **intensity of cooperation** with **professional institutions** and **public sector** was rated **higher**, and with Slovenian **private sector slightly higher** than the CerDee mean. The **importance of cooperation** with Slovenian **professional institutions** is seen **more important** than in the other CerDee countries. **Influence level** of each sector except the **private sector** is seen **bigger** than is the average from all countries.

In this current modern world is good the fact that companies plan more **online advertising** and to do **marketing activities on their own websites** in the future. Using of social media is important; the plan for the future marketing activities includes the use of **YouTube, Instagram** and **Facebook**. Greater use of **own online stores** and **multi-brand online platforms** is also planned for the future. Slovenia plans greater development in modern marketing than the other CerDee countries (except Austria), although the current situation is comparable in all these states.

For the marketing activities are mostly responsible **own forces of the company** which means lower costs for the entrepreneurs.

As part of private sector in Slovenia, a special type of legal form also exists, that is called "self-employed in culture". The artists get this status based on their results/art works and their active integration in the field of culture. The government (Ministry of Culture) supports them with exemption from taxes, but their annual income cannot exceed 20.000 Euro.

5.2. Weaknesses

Weaknesses limits the company to reach its full potential, on the other hand they show the areas that can be improved. To identify the weaknesses of the CerDee countries it was also necessary to compare data obtained from the survey. Detail information about individual CerDee countries is described in following parts.

5.2.1. Weaknesses of the ceramic and porcelain sector in Austria

Intensity of current cooperation with **all stakeholder sectors** was rated **lower** in Austria in comparison to other CerDee countries. Big problem for ceramic sector in Austria seems to be the lack of support and promotion by social media and not many opportunities where the entrepreneurs can exhibit their products, such as galleries etc.

Just 83 % of the respondents consider the cooperation in the ceramic sector as insufficient and many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer. **Importance of cooperation** with **cultural institutions**, **educational institutions** and **professional institutions** was rated **lower. Influence level** of **all stakeholder sectors** is seen **smaller** in Austria than is the average from all countries.

Although respondents from Austria see the financial situation as in average, 77 % of them do not use any financial indicators to monitor the efficiency of their businesses.

As crucial barriers of the sector (Question 14) were mentioned many different aspects. Respondents see the problem in a small number of extended educational opportunities and lack of knowledge of production processes. There was often mentioned that an association connecting businesses in the ceramic and porcelain sector are needed. Big problem for ceramic sector in Austria seems to be the lack of support and promotion by social media and not many opportunities where the entrepreneurs can exhibit their products, such as galleries etc.

5.2.2. Weaknesses of the ceramic and porcelain sector in Czechia

The respondents see the overall situation in ceramic sector more negative than positive; only 22 % expect a growth of the sector in next 5 years. 22 % of the respondents consider the cooperation in this sector as a sufficient, 57 % as insufficient. The situation seems to be worst only in Austria.

Weakness of porcelain and ceramic sector in Czechia is that 65 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses.

Big problem for ceramic sector in Czechia seems to be small demand after their products due to import of cheap ceramic products from abroad. Entrepreneurs think that national institutions do not help them, especially with financing new businesses or starting a project in their sector.

Intensity of current cooperation with Czechian professional institutions and public sector was evaluated lower than is the CerDee mean and also the Importance of cooperation with educational sector, private sector, professional institutions and public-private acting sector was rated lower. Influence level of almost all stakeholder sectors except educational institutions and private sector is seen smaller than is the average from all countries.

As crucial barriers of the sector (Question 14) were mentioned many different aspects. Respondents see the problem in an insufficient support from Czech government. That means not enough of money in the field. Another problem is that a tradition of the market should be more appreciate, almost no one knows about the price of traditional white jewel called porcelain. Customers buy cheaper products imported from abroad. According to Czechian entrepreneurs is another barrier expensive kiln and another equipment.

5.2.3. Weaknesses of the ceramic and porcelain sector in Germany

Although there are chambers of crafts/trade in Germany, there is no branch for ceramists. The profession of a potter or ceramist is not a listed profession with the chambers and therefore, there is no direct and topic related support by any of them. Ceramists are allowed to use all offers, open to everybody, which usually are related to general information and support about taxes and regulations. However, there is no support available then it comes to ceramic related problems. The guilds usually are run by volunteers which alongside have to operate their own workshops. Therefore, any support by the guilds always depends on the current situation of the person responsible for it.

It seems to be there are three main weaknesses in Germany. The first one is probably no lobby for handicraft in general and therefore no appreciation, then cheap ceramic imports and promotion of them (IKEA etc.) and therewith no need to appreciate local/regional, sustainable, “expensive” handmade products.

Big problem for ceramic sector in Germany seems to be the lack of support and promotion through social media or traditional media like newspaper and not many opportunities where the entrepreneurs can exhibit their products, such as galleries etc.

Weakness of porcelain and ceramic sector in Germany is that 87 % of the entrepreneurs do not use any financial indicators to monitor the efficiency of their businesses. This number is the highest of all CerDee countries.

Intensity of current cooperation with **all stakeholder sectors** was rated **lower** in Germany in comparison to other CerDee countries. **Importance of cooperation** with **almost all stakeholder sectors** was rated **lower**, except cooperation with German **cultural institutions**, which is seen **more important** than in the other CerDee countries. **Influence level** of **all stakeholder sectors** is seen **smaller** in Germany than is the average from all countries.

Only 54 % of respondents **cooperate** with some **educational institution.** This number is the second lowest (after Italy) in comparison to the other CerDee countries.

It seems that there is a lack of interest in handmade products in Germany. It might be quite hard to get advertisement or editorial article in newspapers or magazines. This kind of advertising might be expensive especially for small enterprises or the entrepreneurs themselves.

As crucial barriers of the sector (Question 14) were mentioned many different aspects. Respondents see the problem mostly in insufficient promotion of the sector. Another problem is that a tradition of the market should be more appreciate because of the uniqueness and the origin. The fact that the origin of products is not appreciate enough goes hand in hand with another barrier; customers buy cheaper products from abroad. According to Slovenian entrepreneurs is another barrier that public do not know much about the production of porcelain and ceramic articles.

5.2.4. Weaknesses of the ceramic and porcelain sector in Italy

There is a **need for further education and training** visible among the respondents. Only 25 % of them work actively on employee or self-training. Interesting and helpful topics for further education and training in craft and design skills are **modern techniques**, **design management**, **design techniques** or **foreign inspiration**

However, 67 % of the respondents **do not use any financial indicators** to monitor the efficiency of their businesses.

Big problem for ceramic sector in Italy seems to be **education** in this industry. Many entrepreneurs think that education in this industry should have **higher quality**. They would appreciate more cultural activities, which could promote ceramic sector in their region. Students as potential entrepreneurs feel **lack of knowledge** for future work mostly in **entrepreneurial skills**, **languages**, **dealing with clients**, as well as **in managerial skills** and **law**.

As **crucial barriers of the sector** (Question 14) were mentioned many different aspects. Respondents see the problem in **tax rate** in the country that discourage young people from starting business. Another problem is that the pandemics affected **economic situation** in Italy and forced customers to **buy cheaper products**. According to Italian entrepreneurs, people **appreciate handmade ceramic articles**, but they cannot afford the products. There is **not enough of educational institutions** in the artistic field in Italy according to respondents.

5.2.5. Weaknesses of the ceramic and porcelain sector in Poland

Weakness of porcelain and ceramic sector in Poland is that 50 % of the respondents do not use any financial indicators to monitor the efficiency of their businesses.

The respondents see the **overall situation in ceramic sector more negative than positive** and only 29 % expect a **growth of the sector in next 5 years.** As just 38 % of the respondents consider the **cooperation in the ceramic sector as a sufficient,** many of them would appreciate to participate in some project and the cooperation between their businesses and public sector to be closer.

Big problem for ceramic sector in Poland seems to be education in this industry. Many stakeholders think that there should be more educational institutions in Poland. In relation, many respondents answered there is a lack of skilled labor.

Intensity of current cooperation in **private sector**, where the cooperation was evaluated as **extensive. Importance of cooperation** with **educational sector**, **private sector** and **public-private acting sector** was rated **lower. Private sector** and **public-private acting sector** are thought to have less influence.

As **crucial barriers** of the sector (Question 14) were mentioned many different aspects. Respondents see the problem in high taxes and costs of labour, energy, gas or rent. The high costs cause the increase of price of a final product. Another problem is the fact that customers rather buy cheaper products imported from Asia. This means limited demand for local ceramic and porcelain products. According to Polish entrepreneurs is another barrier lack of educational institutions specialized in ceramic and porcelain manufacturing design etc.

The only higher **education institution** with a separate faculty of ceramics is the Academy of Fine Arts in Wrocław. They offer courses in ceramics design craft. The Artistic University in Poznań also has a well-equipped ceramics atelier but this is just one of several ateliers prepared for students of sculpture. The AGH Academy in Krakow offers engineer courses in basic ceramic technologies and materials. There is only one artistic secondary school in Poland that teaches ceramics. Last year a vocational class for ceramics decorators was re-established in Boleslawiec. However, the school lacks the necessary equipment.

5.2.6. Weaknesses of the ceramic and porcelain sector in Slovenia

The respondents see the overall situation in ceramic sector more negative than positive. Just 14 % of the entrepreneurs consider the cooperation in this sector as a sufficient, 61 % as insufficient. The situation seems to be worst only in Austria.

Only nine respondents in Slovenia export their products mainly to other European counties. It makes 3% from all respondents, in comparison to the other CerDee countries the percentage is the lowest. Weakness of porcelain and ceramic sector in Slovenia is that 83 % of the entrepreneurs do not use any financial indicators to monitor the efficiency of their businesses. This number is the second highest (after Germany) of all CerDee countries.

Big problem for ceramic sector in Slovenia seems to be education in this industry. Many entrepreneurs think that it should be given bigger importance to educate students in high schools and universities and educate public in ceramic sector. Students as potential entrepreneurs feel lack of knowledge for future work mostly in entrepreneurial skills, dealing with clients, as well as in managerial skills and law.

On the university level, there is only have one educational program on the Academy of Fine Arts and Design, but they accept only few students per year. That means that they have approximately 25 students in undergraduate and postgraduate studies of ceramics in total. The students can also learn ceramic design on two Faculties of Education in Ljubljana and Maribor, but only as a part of other main study program, so the studies are not based only on ceramics. The Faculty of Ljubljana registers 25 students per year and in Maribor only 20 students per year.

Intensity of current cooperation with Slovenian **cultural institutions**, **educational sector** and **public-private acting sector was** evaluated **lower** than is the CerDee mean and also the **importance of cooperation** with **cultural institutions**, **educational sector**, **private sector**, **public sector and public-private acting sector** was rated **lower.**

As crucial barriers of the sector (Question 14) were mentioned many different aspects. Respondents see the problem in lack of local materials (clay, glazes from some bigger provider). Another problem is that a tradition of the market should be more appreciate. Customers want to buy cheaply many products and do not understand the prices in the market. According to Slovenian entrepreneurs is another barrier a lack of knowledge of general public and the fact that public do not know much about the production of porcelain and ceramic articles.

5.3. Summary of strengths and weaknesses of CerDee countries

5.3.1. Strengths of CerDee countries

One of the strengths of porcelain and ceramics sector in CerDee countries is a **big portion of respondents working actively on employee or self-training**.

In this current modern world is good the fact that companies plan more **online advertising** and to do **marketing activities on their own websites** in the future. Using of social media is important; the plan for the future marketing activities includes the use of **own websites, Instagram** and **Facebook**. Greater use of **own online stores** and **multi-brand online platforms** is also planned for the future. Austria plans greater development in modern marketing than the other CerDee countries. This fact was also mentioned in Question 18. Respondents see the biggest improvement in the fact that ceramic sector in Austria is experiencing new growth due to wider use of the social media.

For the marketing activities are mostly responsible **own forces of the company** in all the CerDee countries, which means lower costs for the entrepreneurs.

Students from all CerDee countries plan to settle down at the same place they come from and students of ceramic and porcelain directions are the potential entrepreneurs in this field for the country. That goes hand in hand with expected **growth of the sector in next 5 years.**

There are **enough of private institutions associated with the ceramic and porcelain industry** in CerDee countries**.**

There are **377 private institutions** in regions of **Germany**, which took part in the research, this number is the highest from all of the CerDee countries, but it is necessary to mention that Germany is the biggest from all of these states. The product range includes everything from simple utility ceramics (earthenware crockery) to high-class porcelain objects (tableware, art objects) including all possible fields of usage such as tiled stoves, roof tiles, floor tiles, bathroom furniture such as sinks, decorative objects for all purpose, jewellery, and tableware of all kind.

The number of subjects in private sector is the second highest in **the Czech Republic** (after Germany), that is remarkable because this state is quite small. Porcelain production in the Czech Republic is divided into few relatively big producers in Karlovy Vary region and Dubí.

There are also few smaller producers, which usually cover niche markets. Further, there is many of potters usually self-employed all over the Czech Republic.

As part of private sector in **Slovenia**, a special type of legal form also exists, that is called "self-employed in culture". The artists get this status based on their results/art works and their active integration in the field of culture. The government (Ministry of Culture) supports them with exemption from taxes, but their annual income cannot exceed 20.000 Euro.

There is also **enough of cultural institutions associated with the ceramic and porcelain industry** in CerDee countries.

The number of **cultural institutions** is the highest in Italy from all the CerDee countries. **The Italian association of Town** of ceramic tradition AICC, gives a wide idea of the quantity of ceramic museums and institutions are active in Italy. In the northern part of Italy (CERDEE area), beside the **International Museum of Ceramics** in Faenza, partner of CERDEE, there are ceramics Museums in all the regions. In Faenza, there are also **private museums** such as **Museo Tramonti, Museo Zauli and Museo Gatti**, which have been found over the heritage of important artists. The cultural associations have established collaboration with the MIC, such as the FACC – **Faenza Art Ceramic Centre** that is also collaborating in CERDEE.

A quite new phenomenon in Austrian ceramic culture are co-working spaces like **„rami-ceramics"**, **„potteria"** and **„keramik tonhalle"**. They offer courses for various ceramic techniques (for beginners and advanced ceramists as well) and it is possible to rent a studio place there.

Ceramics as a hobby is quite popular in Poland. Almost in every larger town, there is a public **cultural institution**, which offers afternoon classes in ceramics. In Bolesławiec, there are three institutions that promote ceramics: International Centre for Ceramics, Museum of Ceramics, and Youth Culture Centre. Local producers (access to materials, expertise, workplaces etc.) somehow support all of them.

5.3.2. Weaknesses of CerDee countries

Weakness of porcelain and ceramic sector in CerDee countries is that the respondents **do not use any financial indicators** to monitor the efficiency of their businesses.

Big problem for ceramic sector seems to be **small demand after** their **products** due to import of cheap ceramic products from abroad. A tradition of the market should be **more appreciate**, almost no one knows about the price of traditional white jewel called porcelain. Customers buy **cheaper products imported** from abroad. Because of the promotion of cheap ceramic imports, there is no need to appreciate local sustainable handmade products. For local entrepreneurs it might be quite hard to get advertisement or editorial article in newspapers or magazines. This kind of advertising might be expensive especially for small enterprises or the entrepreneurs themselves.

Another problem for ceramic sector seems to be not many opportunities where the entrepreneurs can exhibit their products, such as galleries etc.

Entrepreneurs think that **national institutions do not help them**, especially with financing new businesses or starting a project in their sector. Respondents see the problem in high taxes and costs of labour, energy, gas or rent. The high costs cause the increase of price of a final product. Expensive material such as kiln and other equipment also means higher prices of the products.

Big problem for ceramic sector in almost all CerDee countries seems to be **education** in this industry. Many entrepreneurs think that education in this industry should have **higher quality**. They would appreciate more cultural activities, which could promote ceramic sector in their region. Students as potential entrepreneurs feel **lack of knowledge** for future work mostly in **entrepreneurial skills**, **languages**, **dealing with clients**, as well as **in managerial skills** and **law**. Lack of educational institutions specialized in ceramic and porcelain manufacturing design etc.

In **Poland,** the only higher **education institution** with a separate faculty of ceramics is the Academy of Fine Arts in Wrocław. They offer courses in ceramics design craft. The Artistic University in Poznań also has a well-equipped ceramics atelier but this is just one of several ateliers prepared for students of sculpture. The AGH Academy in Krakow offers engineer courses in basic ceramic technologies and materials. There is only one artistic secondary school in Poland that teaches ceramics. Last year a vocational class for ceramics decorators was re-established in Boleslawiec. But the school lacks the necessary equipment.

In **Slovenia** on the university level there is only one educational program on the Academy of Fine Arts and Design, but they accept only few students per year. That means that they have approximately 25 students in undergraduate and postgraduate studies of ceramics in total. The students can also learn ceramic design on two Faculties of Education in Ljubljana and Maribor, but only as a part of other main study program, so the studies are not based only on ceramics. The Faculty of Ljubljana registers 25 students per year and in Maribor only 20 students per year.

The problem of education does not apply only in Austria and Czechia. Ceramic and porcelain sectors **in Austria** cooperate with educational institutions (70 %) the most in comparison to the other CerDee countries. This cooperation includes internships, workshops, seminars and some other courses with students of bachelor's, master's and other degrees. Another cooperation is in the form of teaching, this way is the most represented in all the answers. The Ceramic School is an online portal founded to inspire, connect and teach ceramic and business techniques. The ceramic school provides ceramic courses online to the masses, from all around the world to follow enthusiasts everywhere.

The educational sector is actually comparatively well developed **in the Czech Republic**. There are five university studios directly dealing with ceramic/porcelain and its design and also other focused on design in the Czech Republic. On the secondary level of education, we have indicated over 10 school connected to ceramic/porcelain production or design. The number of educational institutions is the highest in Czechia in comparison to the other CerDee countries.

Table 15 Strengths and weaknesses in CerDee countries

Strengths	Weaknesses
Active work on employee training and self-training	No use of any financial indicators
Online advertising	Small demand after products
Marketing activities done on social media	Cheaper imported products
Responsibility of own forces of the company for marketing activities, means lover costs	Not enough opportunities to promotion for local entrepreneurs
Students plan to settle down in their country of origins, that means more potential entrepreneurs and growth of the sector	Not enough opportunities to exhibit products (galleries etc.)
Enough of private institutions associated with the ceramic and porcelain industry	No support from national institutions
Enough of cultural institutions associated with the ceramic and porcelain industry	Small number of educational institutions specialized in ceramic and porcelain manufacturing, design etc.

6. Annexes

6.1. Annexes Austria

6.1.1. Businesses as existing entrepreneurial capacities - graphical overview

Figure 1 (Austria) Sample - Legal form of respondents

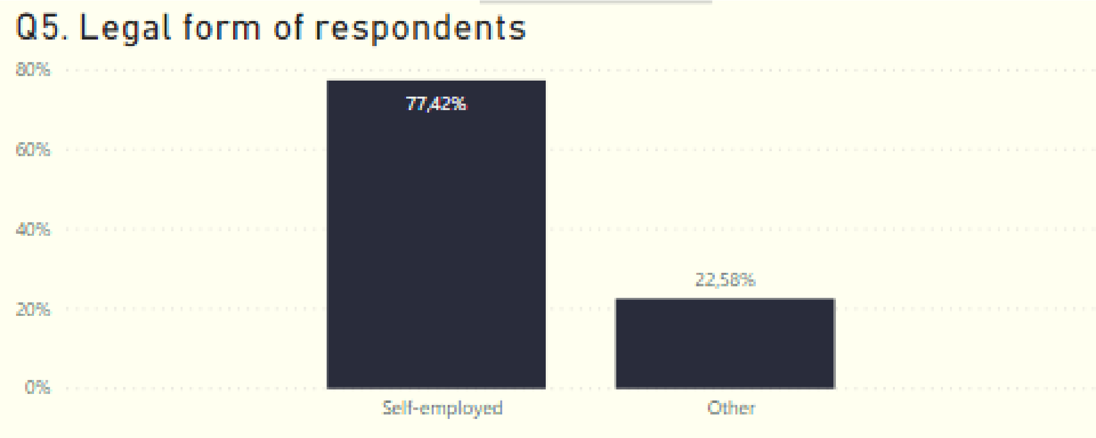


Figure 2 (Austria) Sample - Length of managing business

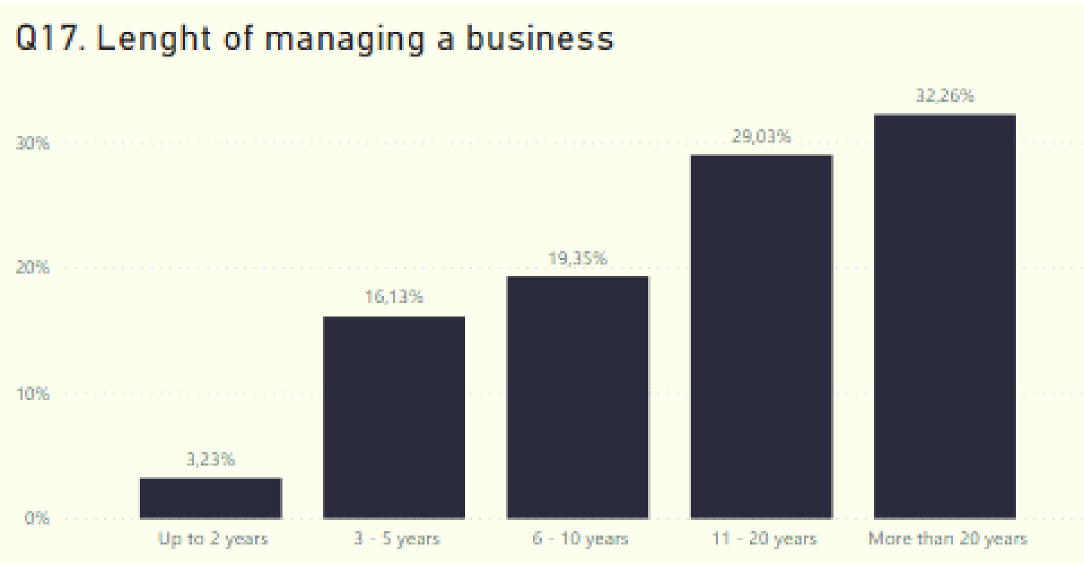


Figure 3 (Austria) Situation in ceramic sector

Figure 4 (Austria) Level of cooperation

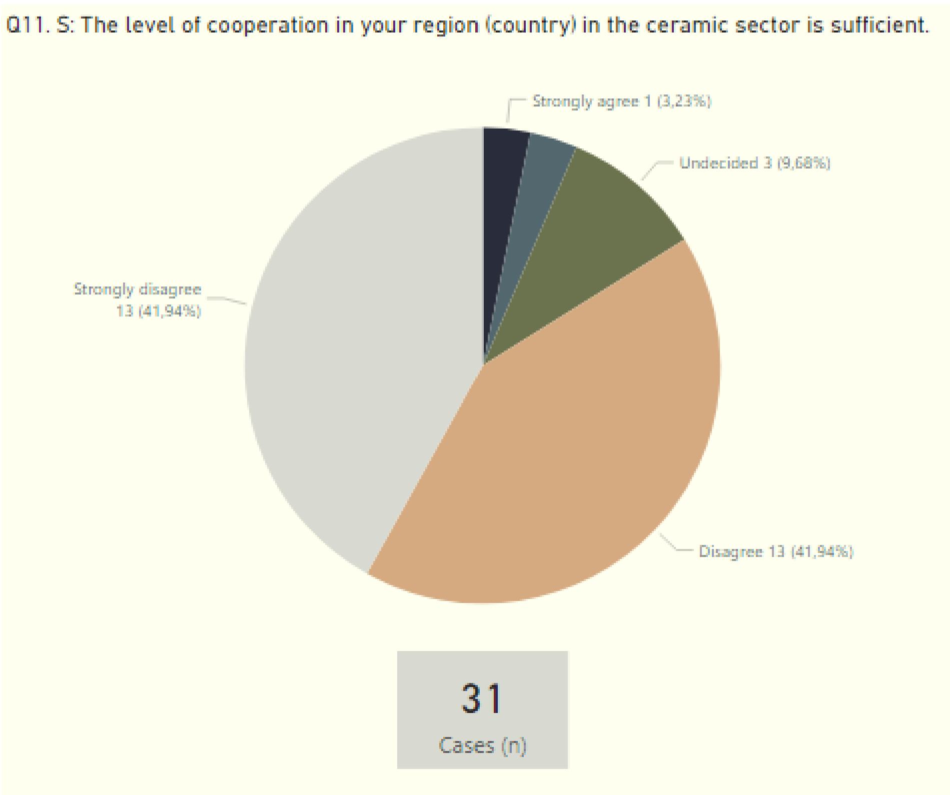


Figure 5 (Austria) Membership in an association

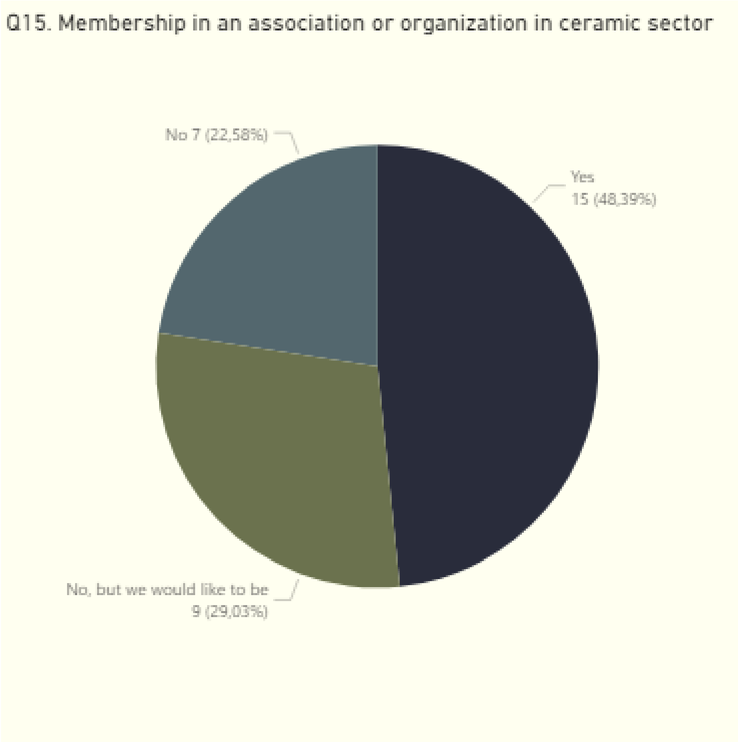


Figure 6 (Austria) Membership in an association

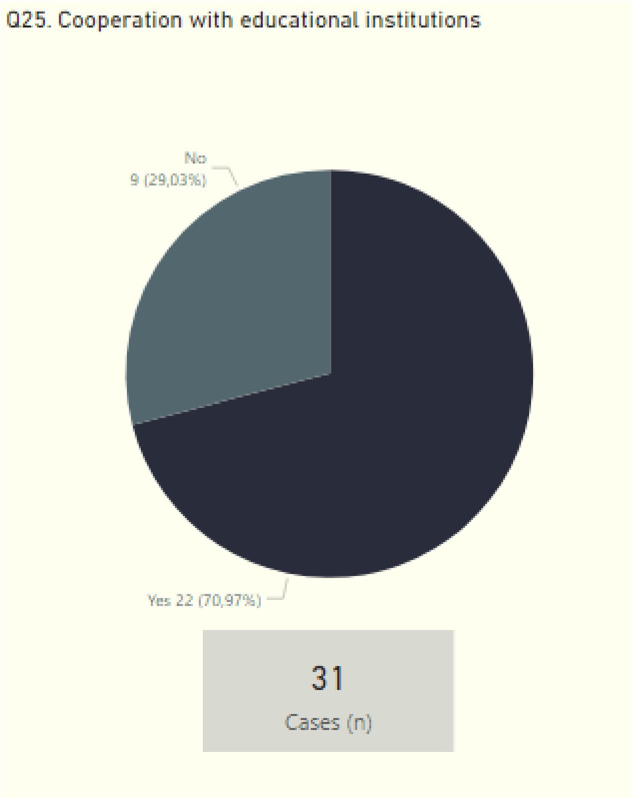


Figure 7 (Austria) Employee and self-training

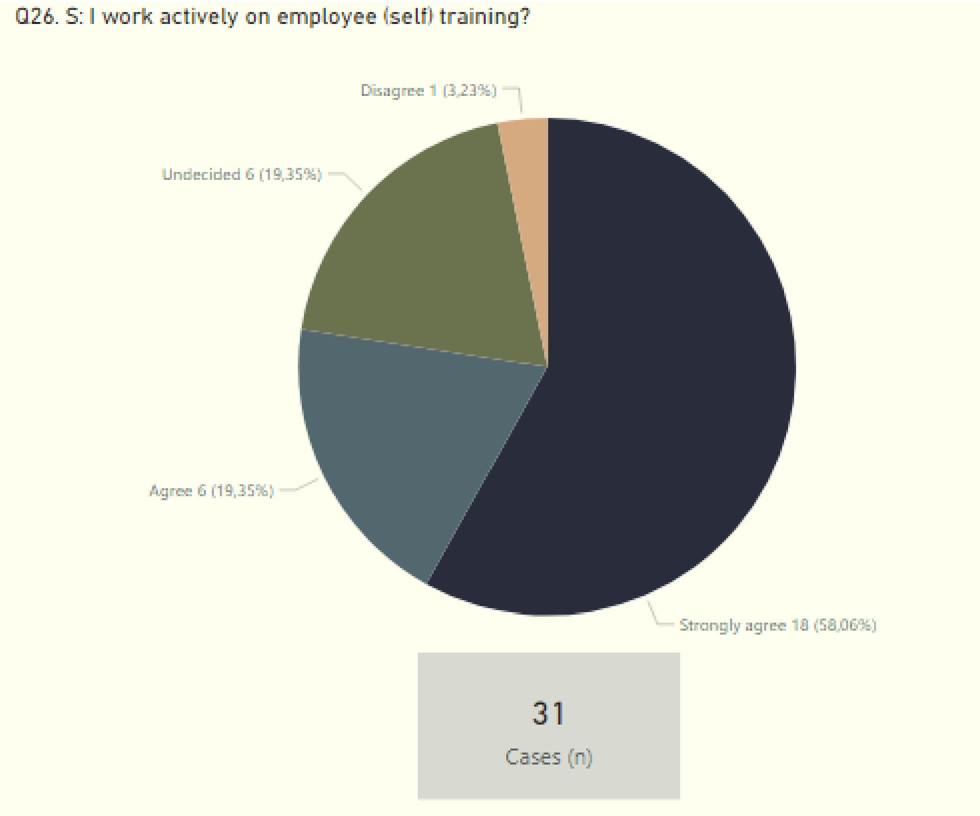


Figure 8 (Austria) Further education and training topics (craft and design skills)

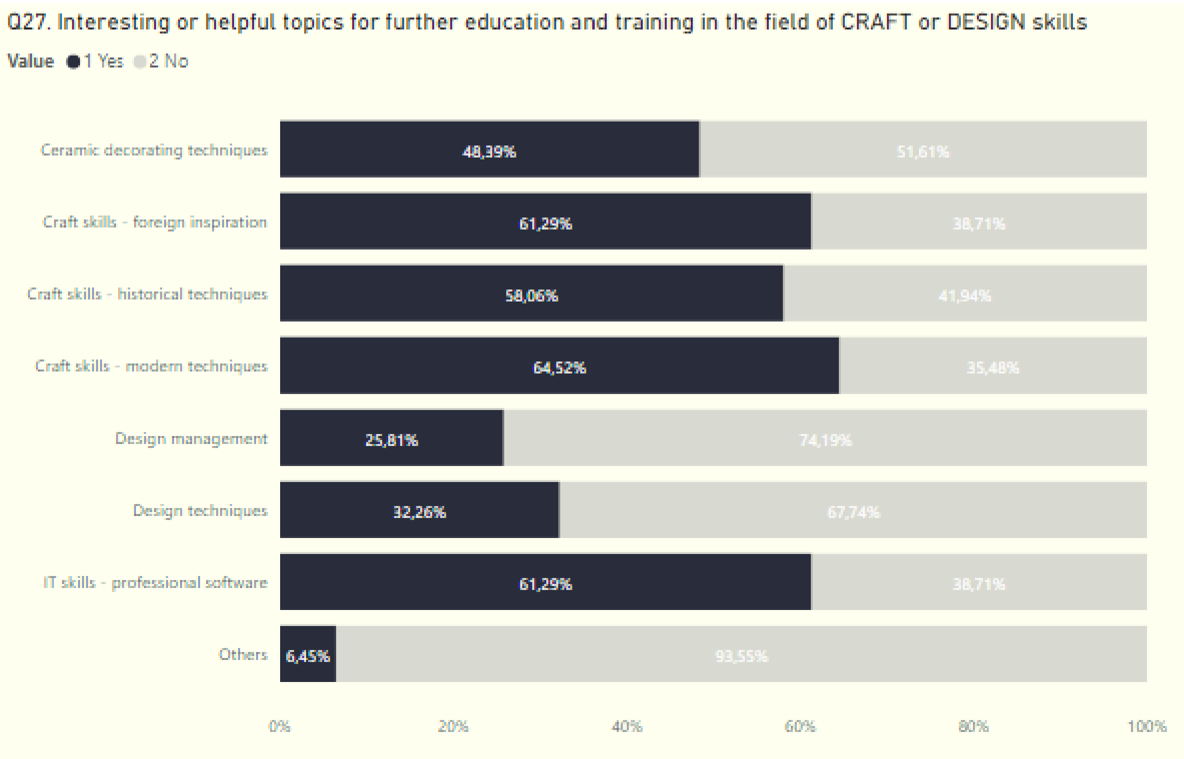


Figure 9 (Austria) Further education and training topics (management, marketing, and business skills)

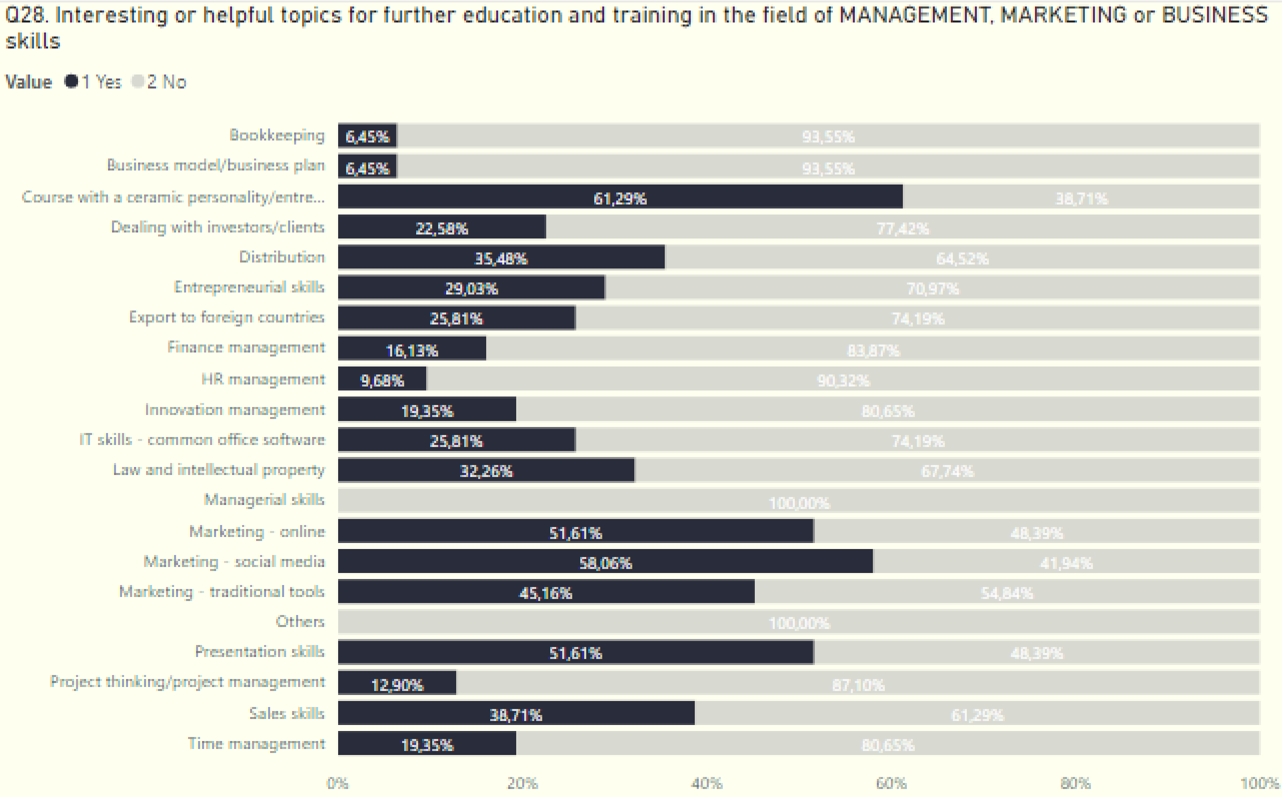
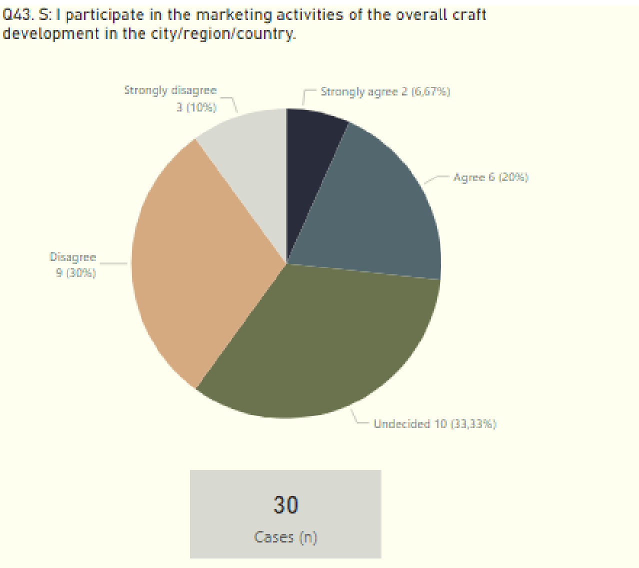


Figure 10 (Austria) Participating in marketing activities in the city/region/country



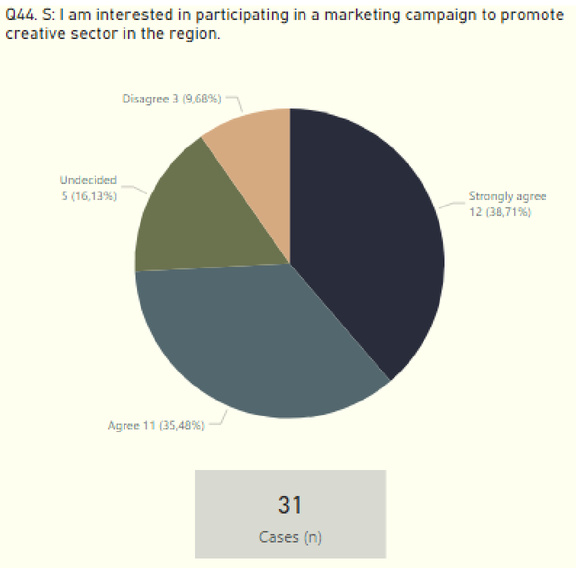


Figure 11 (Austria) A need of international portal about ceramics

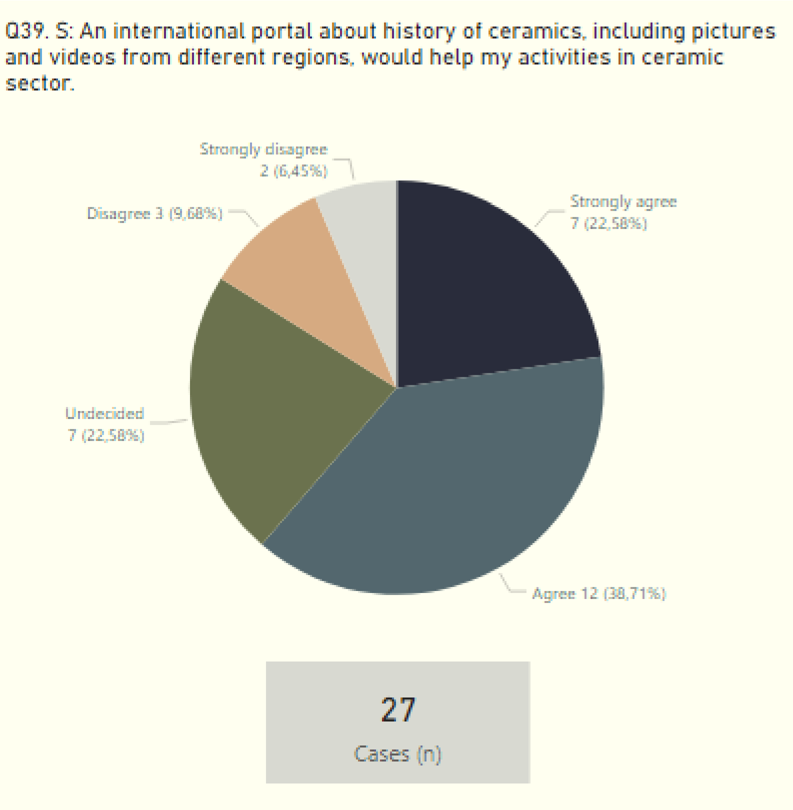
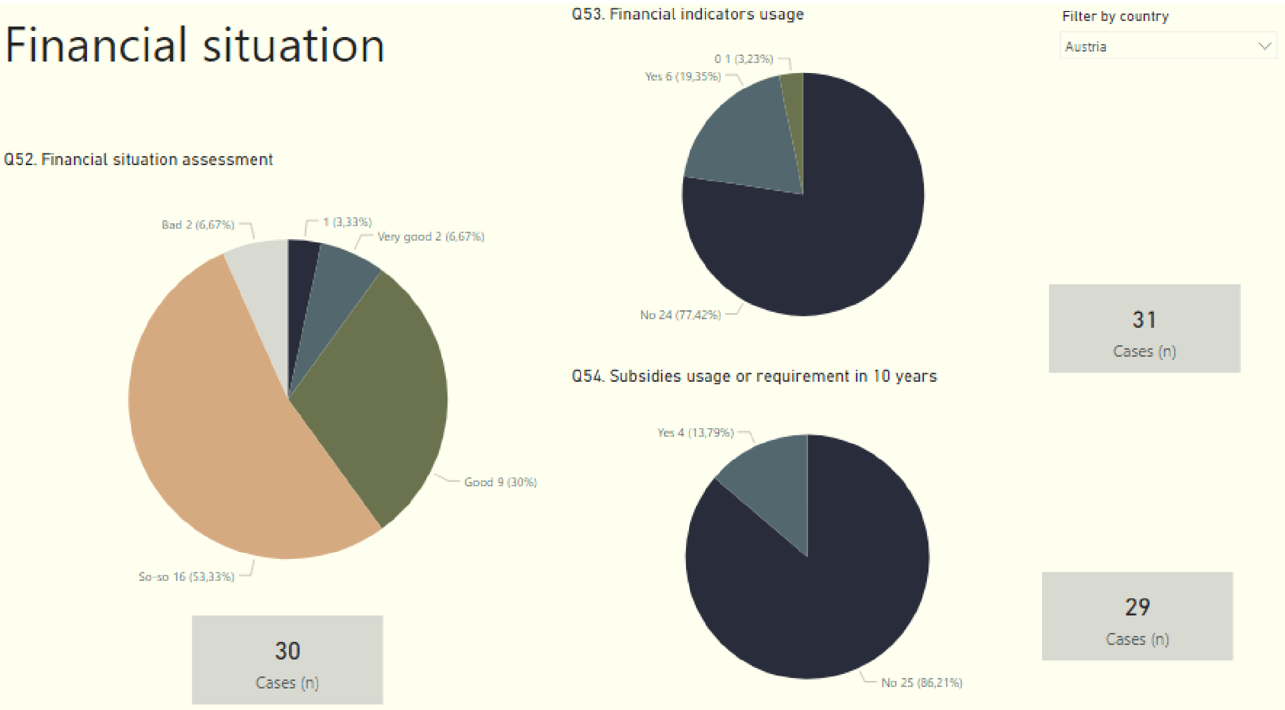


Figure 12 (Austria) Financial situation



6.1.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (Austria) Sample - students

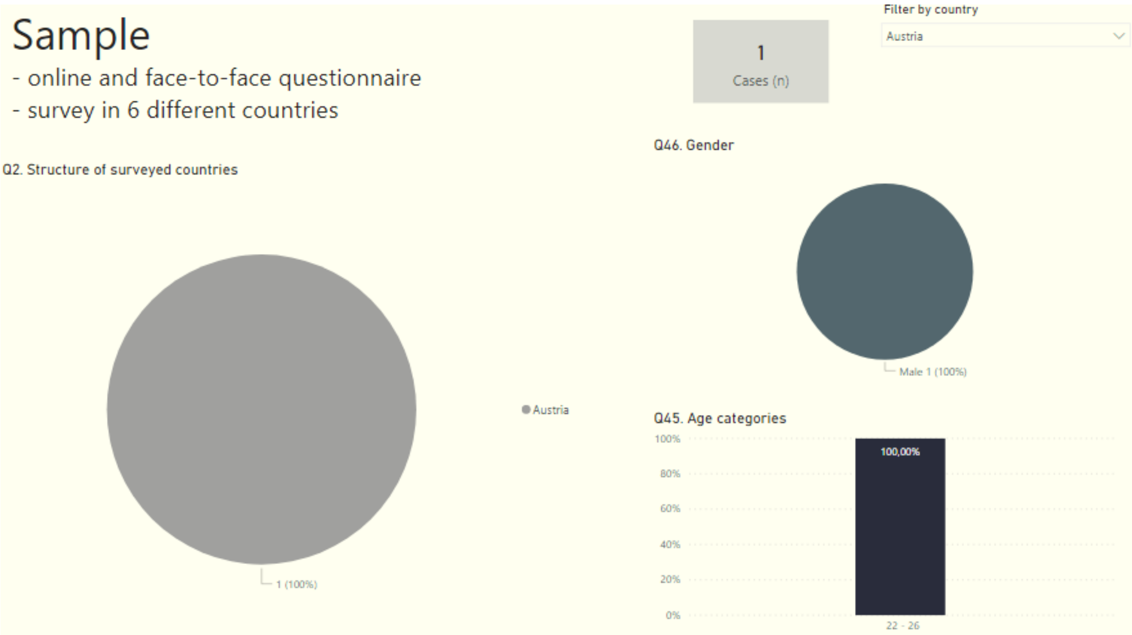


Figure 14 (Austria) Study direction of students

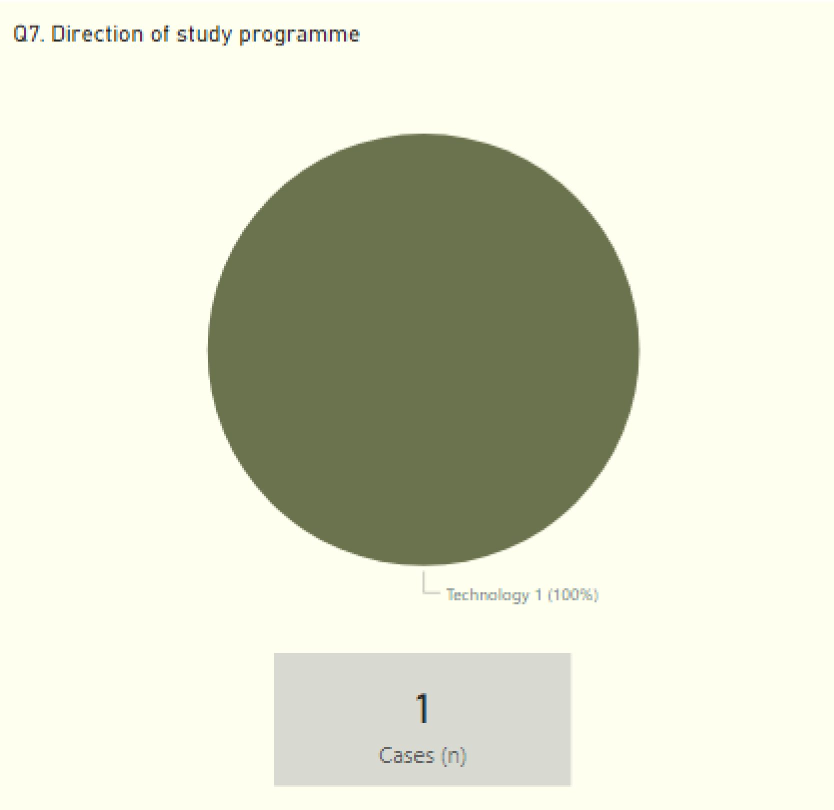


Figure 15 (Austria) Future direction of students

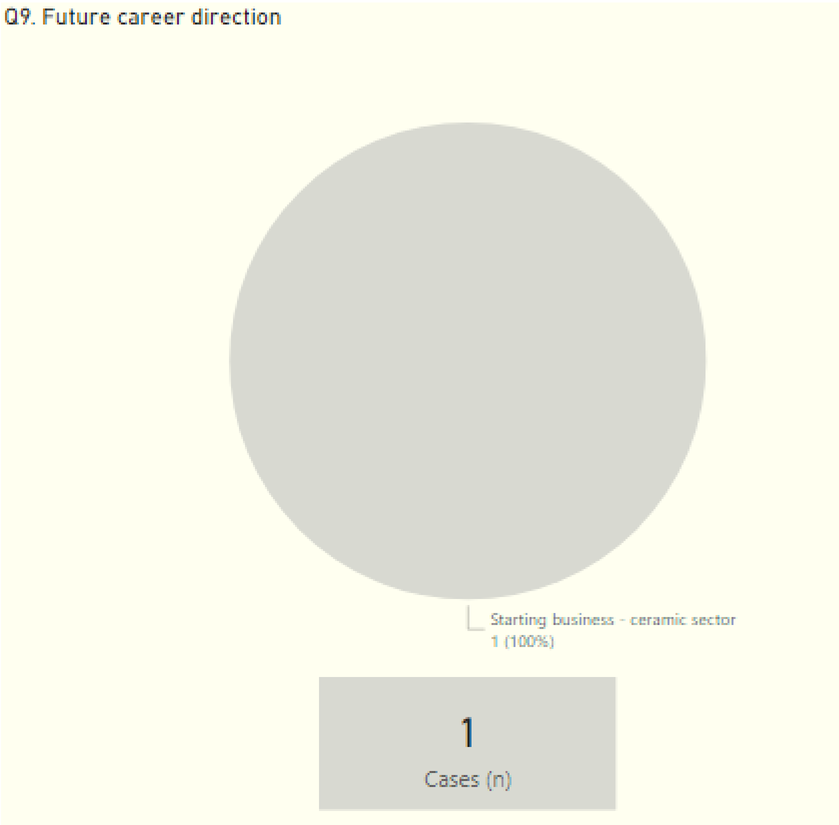


Figure 16 (Austria) Dream job

Figure 17 (Austria) Important students' knowledge/skills gained

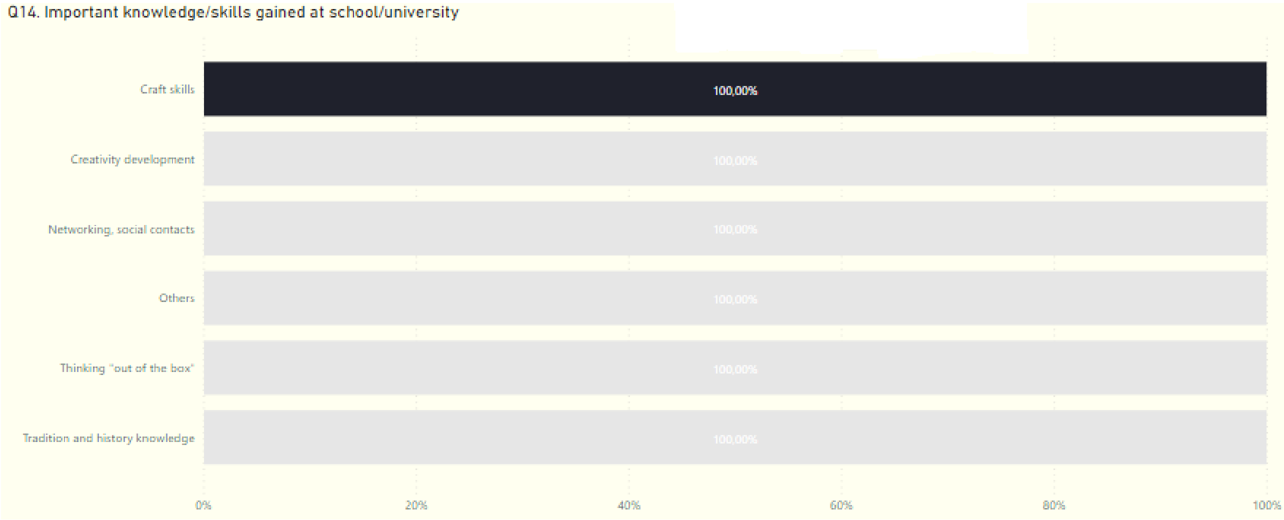


Figure 18 (Austria) Lack in students' knowledge

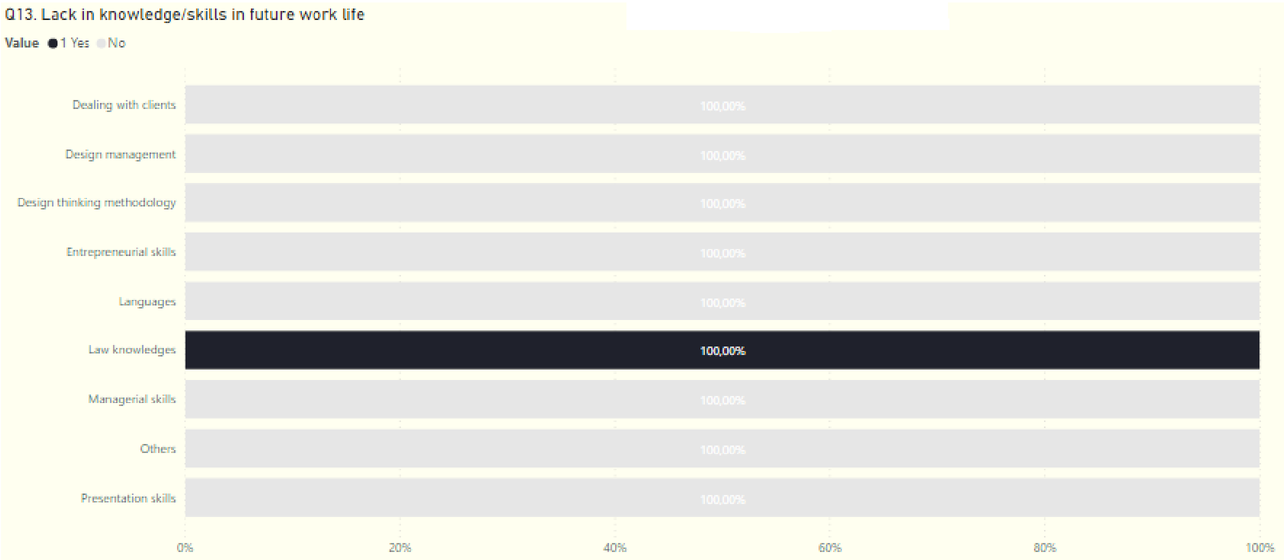


Figure 19 (Austria) Help with starting own business of finding a job

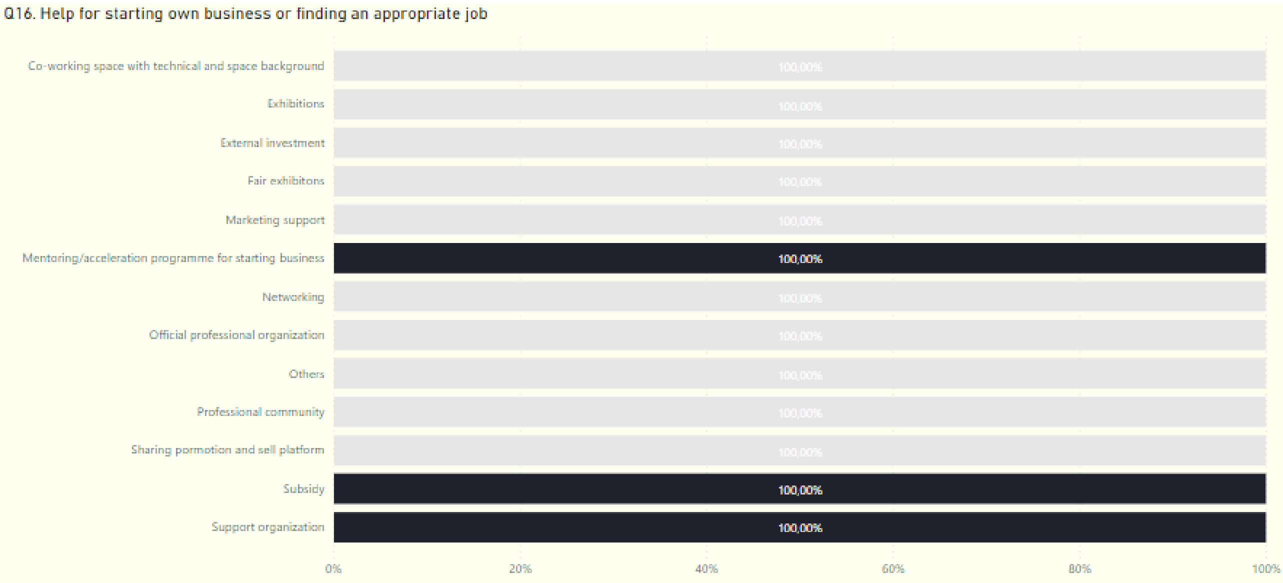
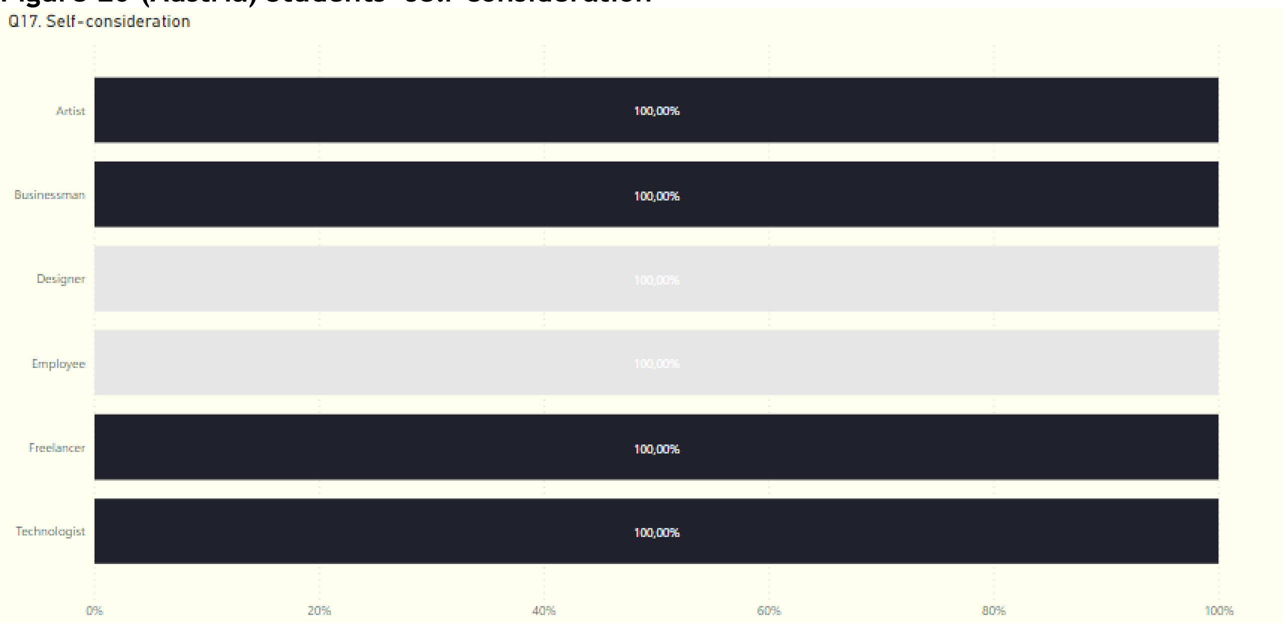


Figure 20 (Austria) Students' self-consideration



6.1.3. Expectations and needs of stakeholders

Figure 21 (Austria) Situation in ceramic sector

Figure 22 (Austria) Intensity of current cooperation

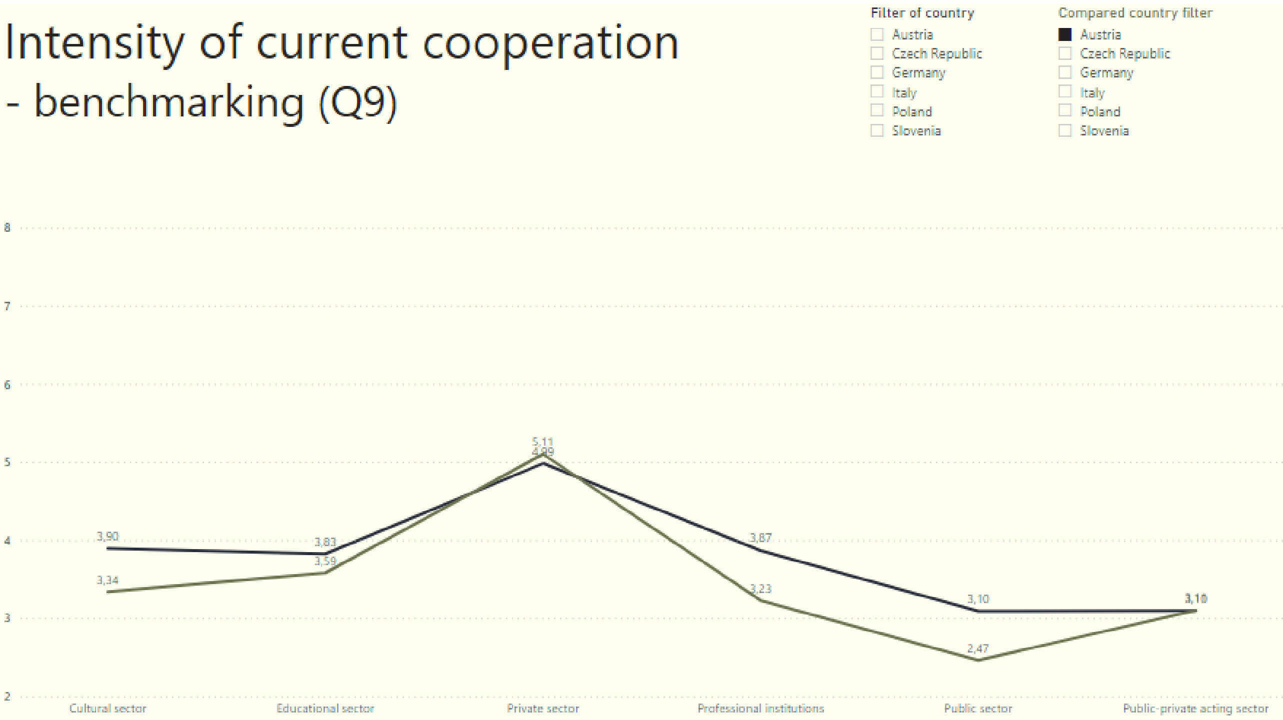


Figure 23 (Austria) Importance of cooperation

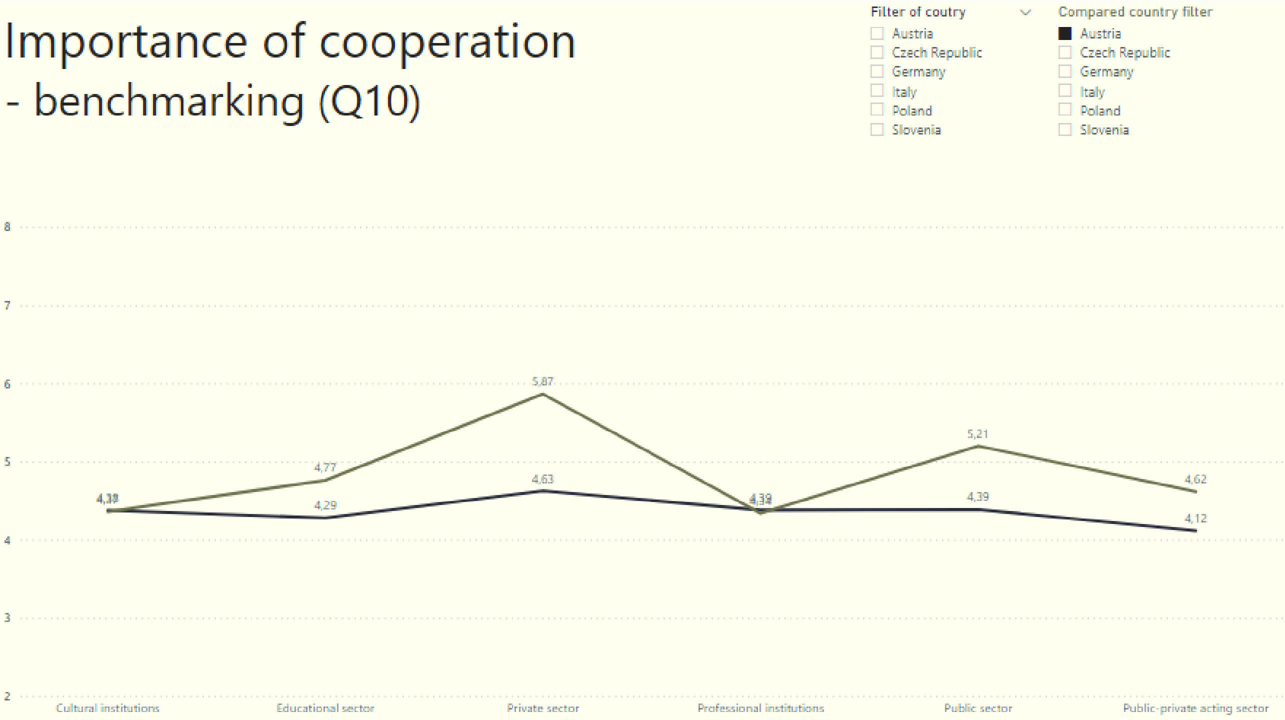


Figure 24 (Austria) Influence level

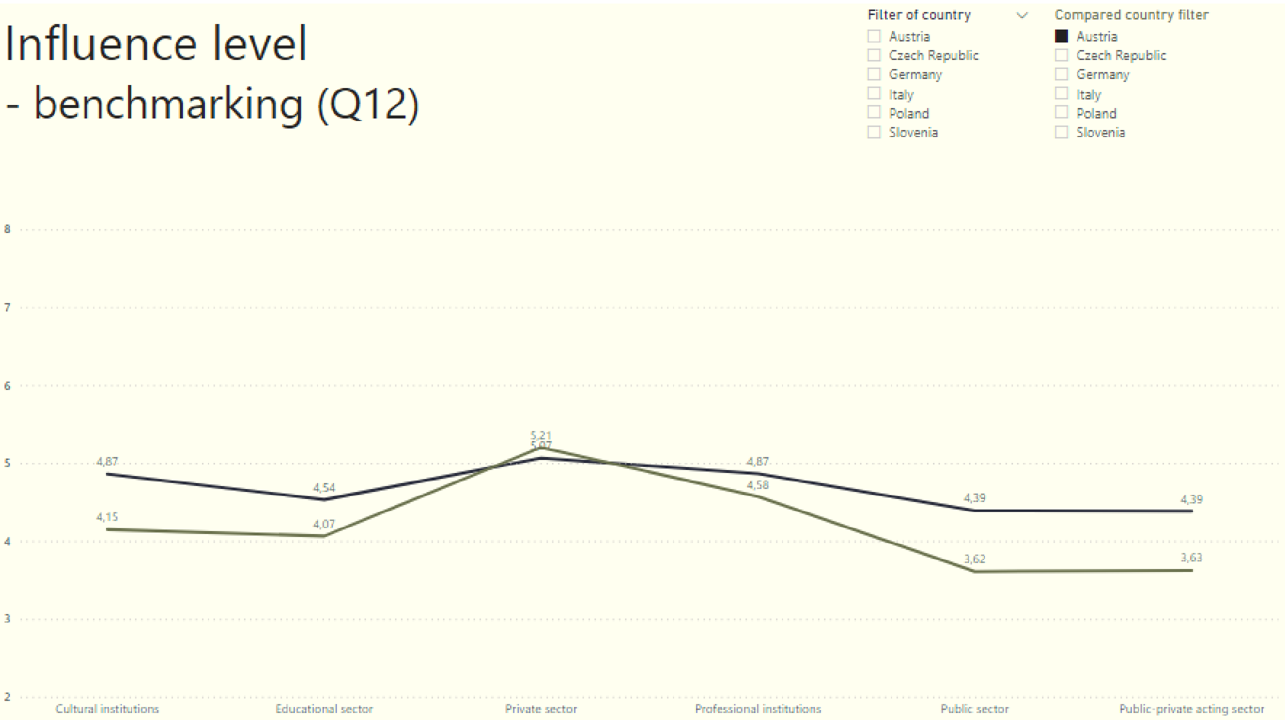


Figure 25 (Austria) Activities to support the sector

Activities to support the sector (Q13)

30

Cases (n)

Filter by country

Austria

Value	Cases
a ceramic gallery, a platform that promotes the ceramic field, association/lobby for ceramists, open-door days at the studio	1
a gallery specialized in ceramics; beginning with basic ceramic education at an early stage; establishing professional markets and exhibitions to generate a regular audience	1
A list of ceramists and their competencies to support each other / cooperate and to order bigger amounts of raw material together	1
buying products made by local ceramists/artist – demand strengthens the manufactories	1
ceramics are experiencing a new boom through social media. It would make sense to network more in general!	1
creating exhibition and presentation spaces for ceramic artists, more competitions/prizes for ceramic art, reintroducing ceramic study course at University of Applied Arts Vienna, promotion of handcrafted ceramic objects and their qualities in public or private use, improvement of training at Fachschule Stoob	1
creating specialized ceramic galleries, exhibitions that contrast ancient and contemporary ceramics in special regions (municipalities), education for craft teachers to arouse interest in ceramics among pupils, blog/magazine that present craft businesses	1
creation of co-working spaces to use various synergies	1
Environmental awareness	1
foundation of a association/lobby; strenghtening the network among ceramists, creating awareness concerning manufacturing processes	1
increased presence in the internet and at markets/fairs as well as on TV/news	1
joint representation of interests, promotion, expansion of training opportunities in ceramics, joint expansion of machine manufacturing options for serial production, supply of show rooms/shops, financial support for kiln purchase/workshop rent at early stage, common glazes/material laboratory, cooperation with different institutions regarding materials research	1
lobbying, education	1
lower wage tax and stop of subsidy	1
marketing initiatives by the public sector (municipalities etc.); cooperation with schools, kindergardens and other public institutions	1
Media attention, support in the digital world to promote ceramics, sales platforms, exhibition opportunities, competitions, efficient training opportunities	1
More and more diverse range of cultural events for interest groups and professional audience like symposia, exhibitions, competitions, residency programs etc.	1
more appreciation, more promotion, better communication	1
Celkem	**30**

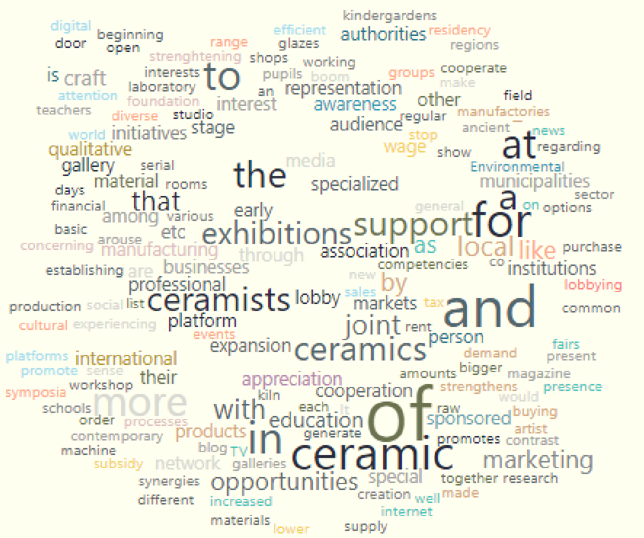
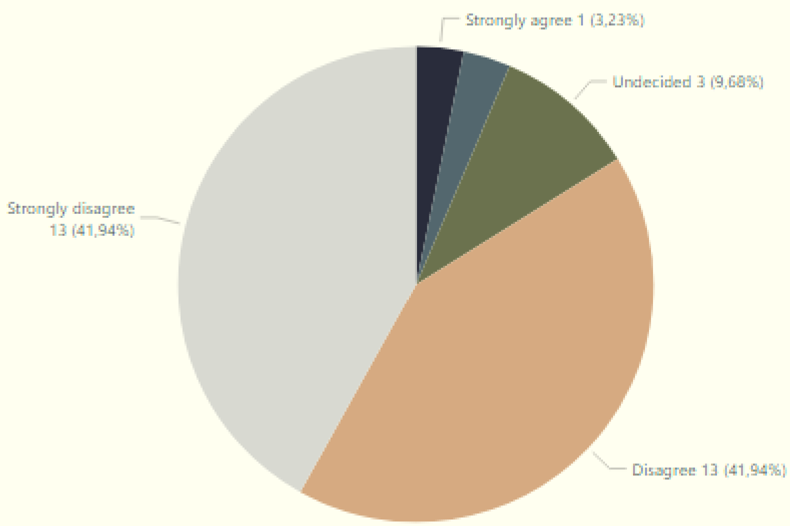


Figure 26 (Austria) Level of cooperation

Q11. S: The level of cooperation in your region (country) in the ceramic sector is sufficient.



31

Cases (n)

Figure 27 (Austria) Support or cooperation

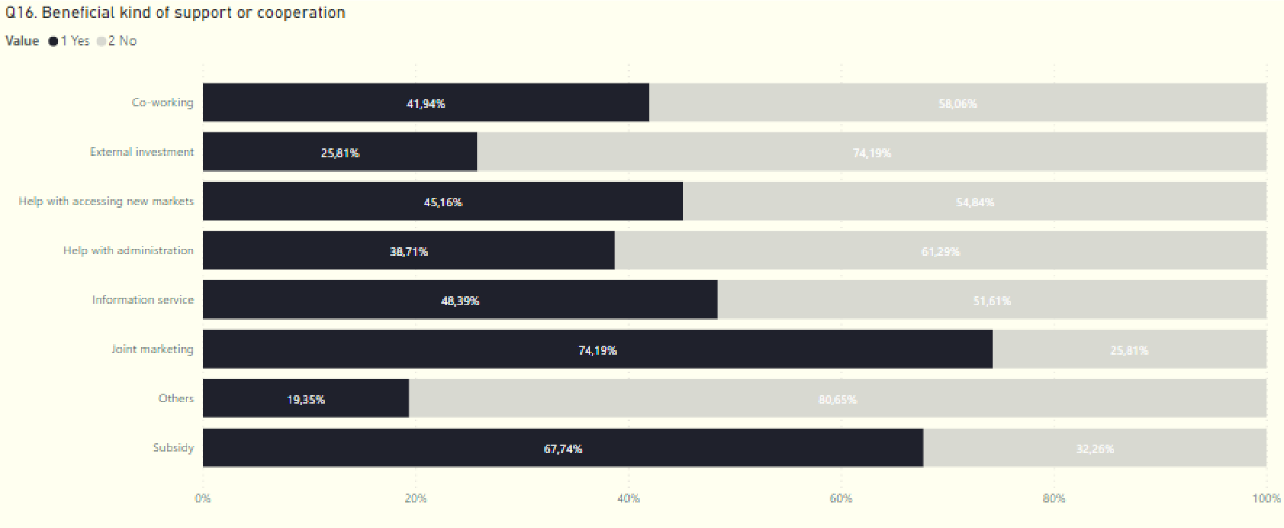


Figure 28 (Austria) Attitude towards a statement

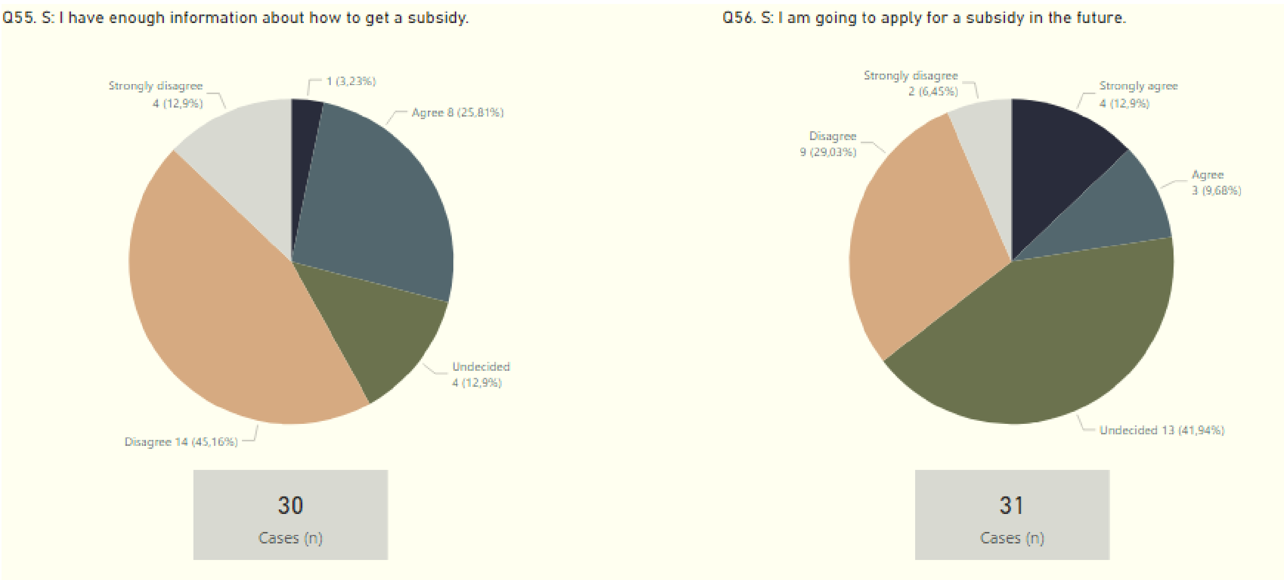
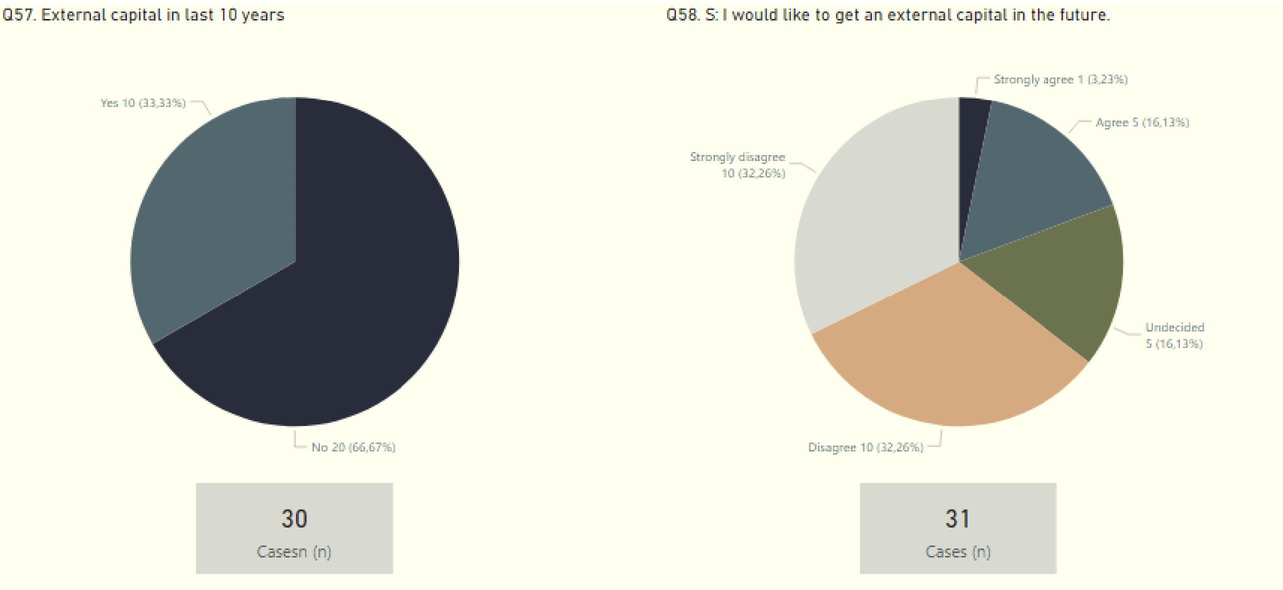


Figure 29 (Austria) Financial situation, attitude towards a statement



6.1.4. Marketing activities

Figure 30 (Austria) Currently used marketing activities

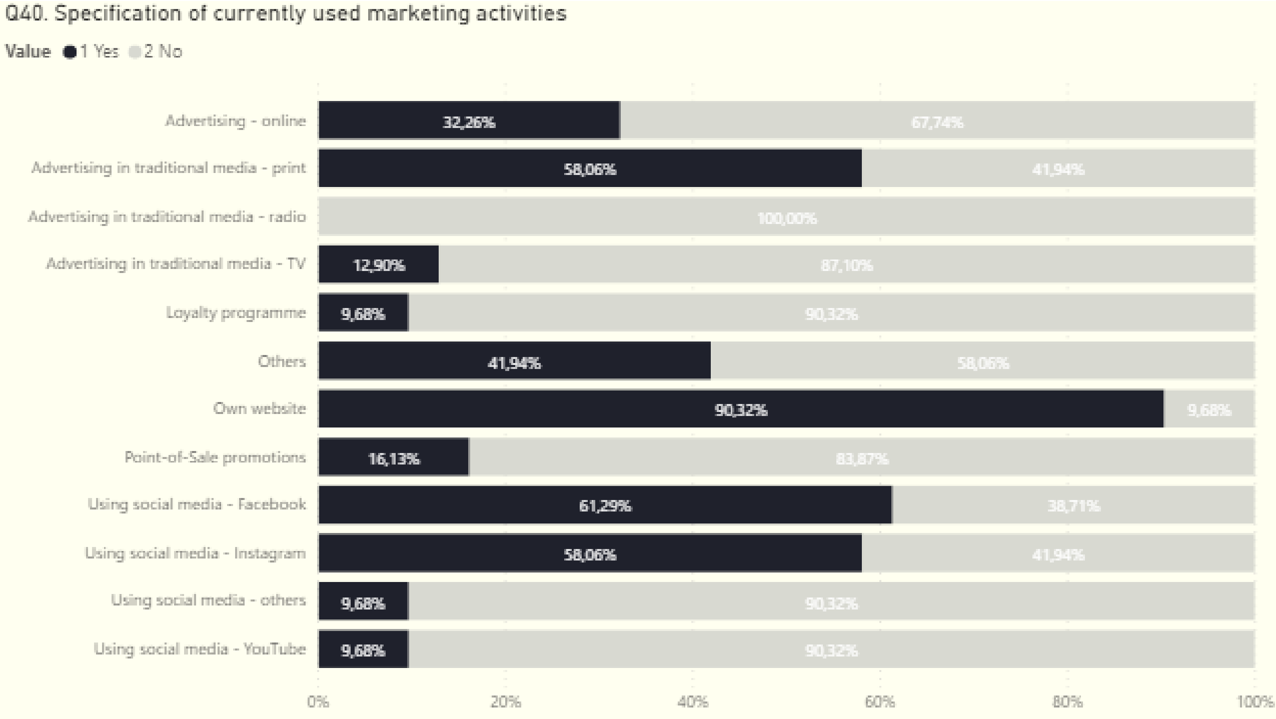


Figure 31 (Austria) Marketing activities planned for the future

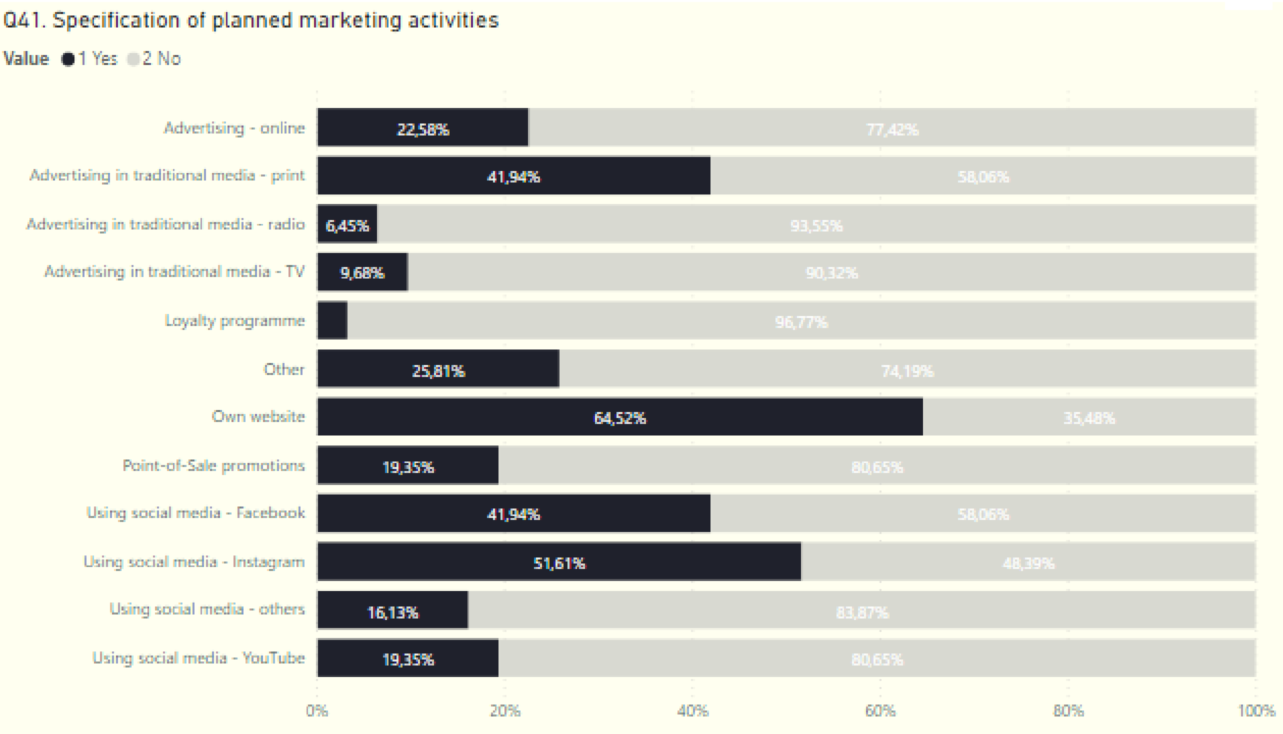


Figure 32 (Austria) Responsibility for marketing activities

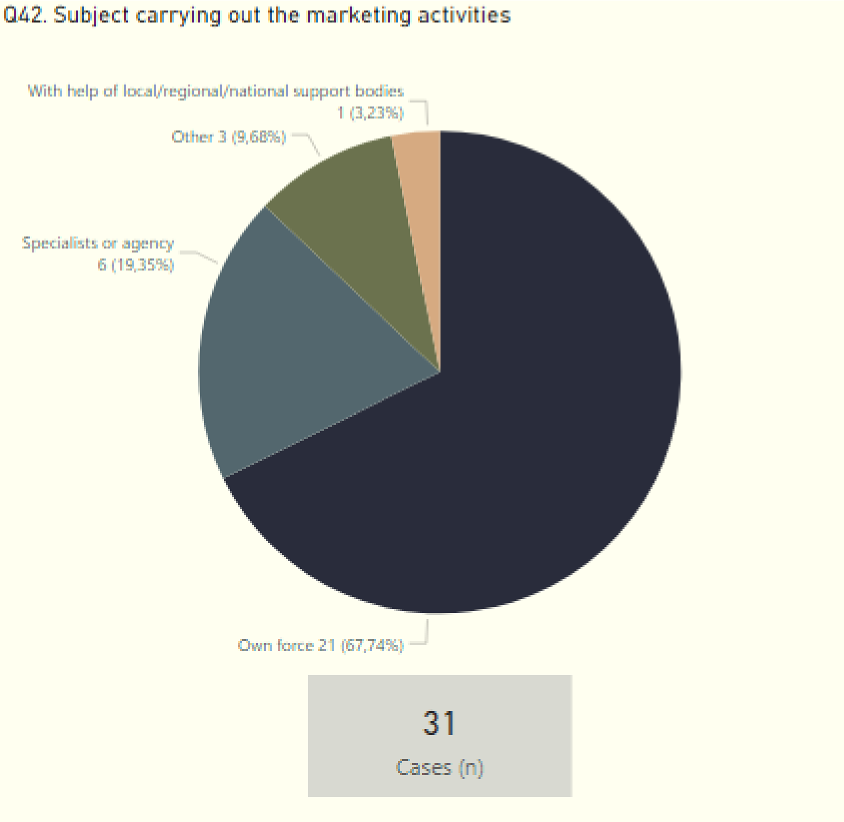


Figure 33 (Austria) Participating in the marketing activities

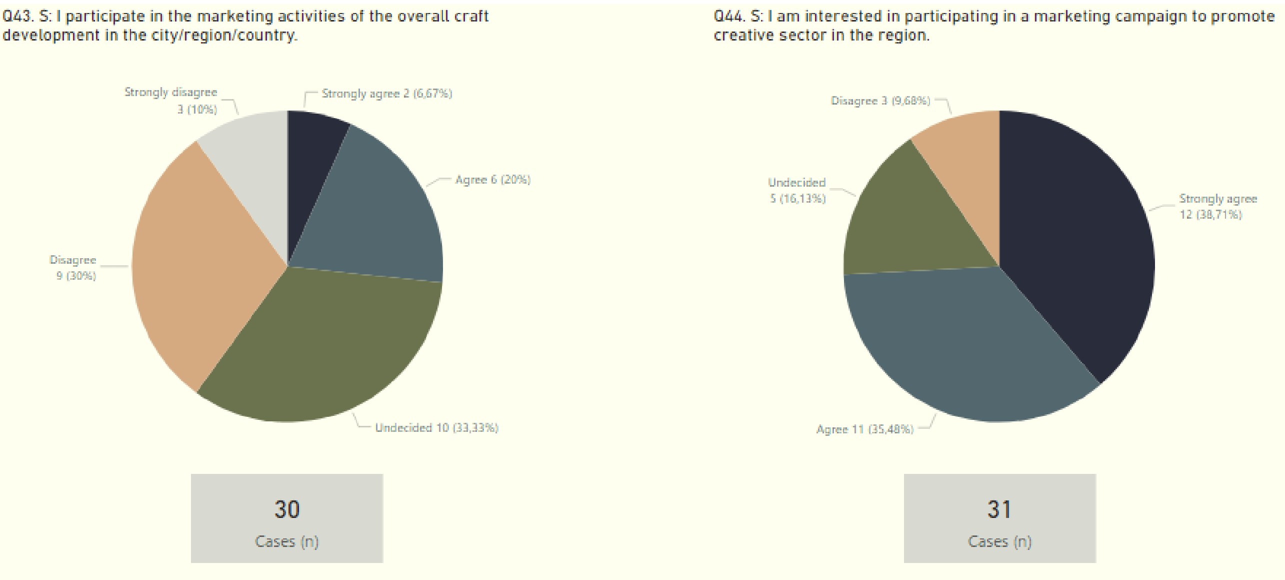


Figure 34 (Austria) Marketing activities on social networks

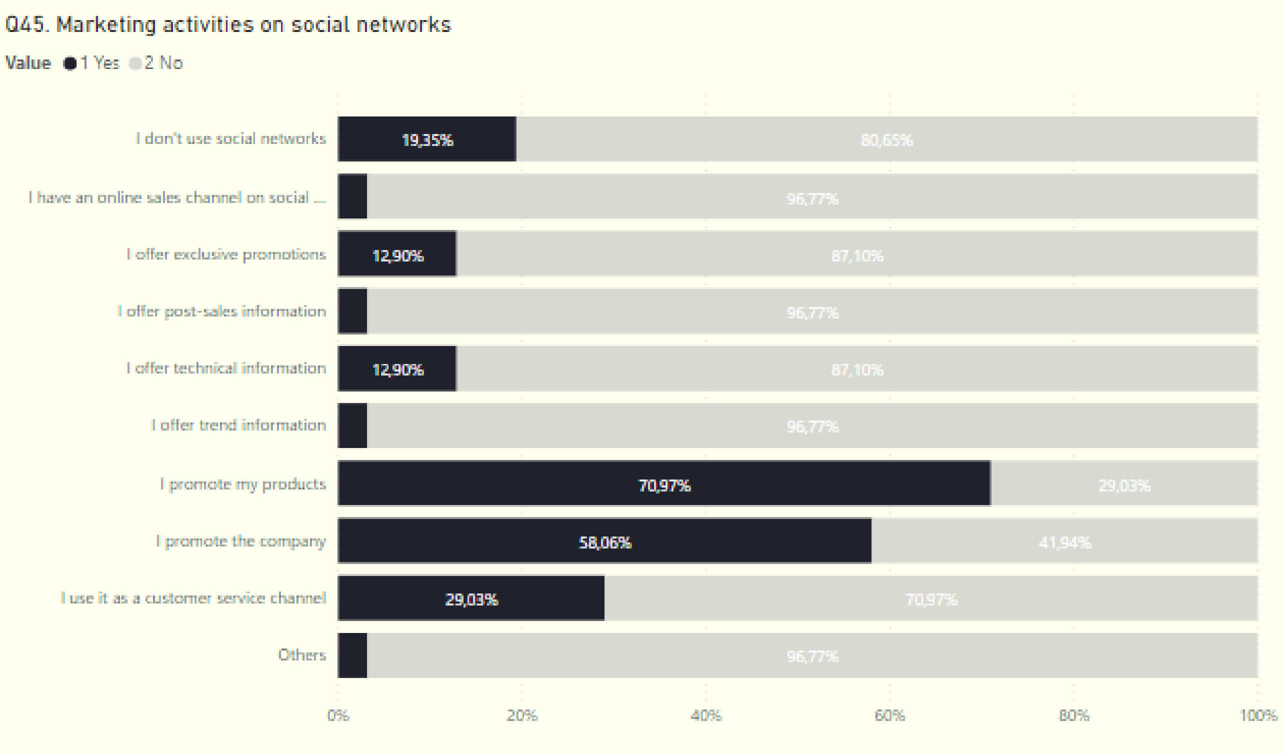


Figure 35 (Austria) Feedback on social media

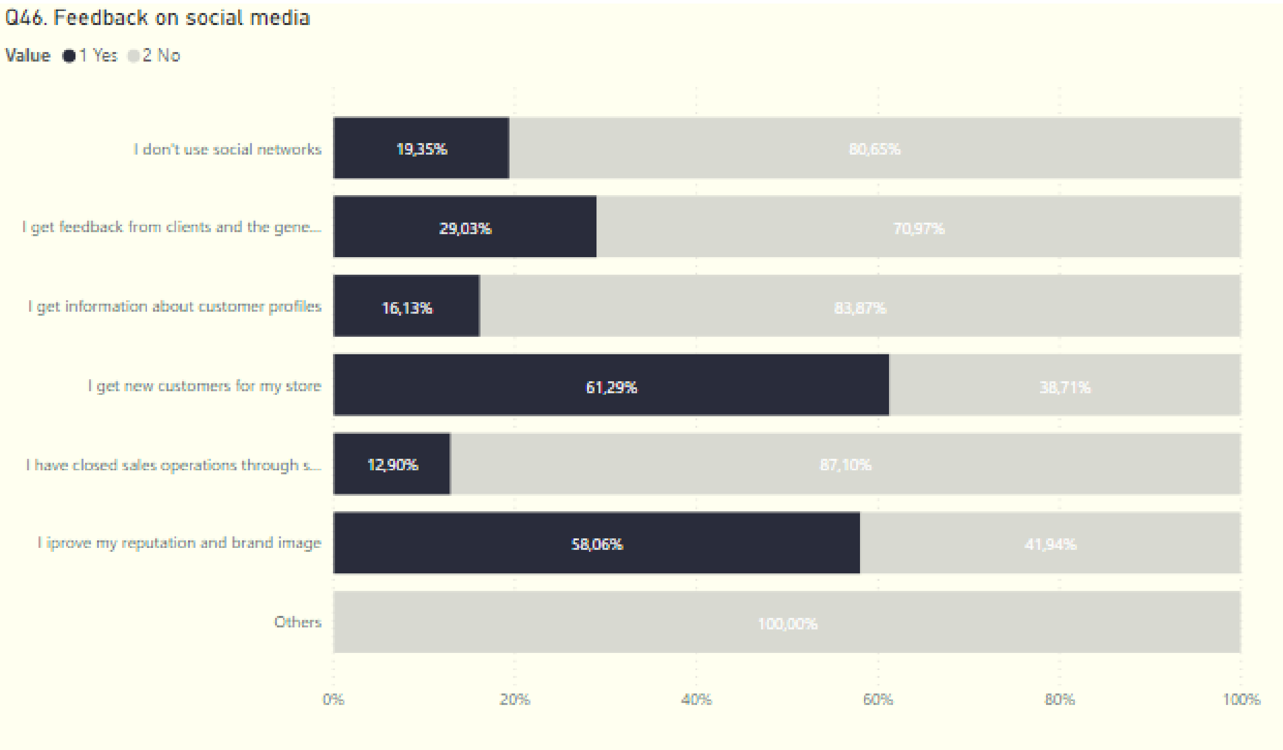


Figure 36 (Austria) Currently used distribution channels

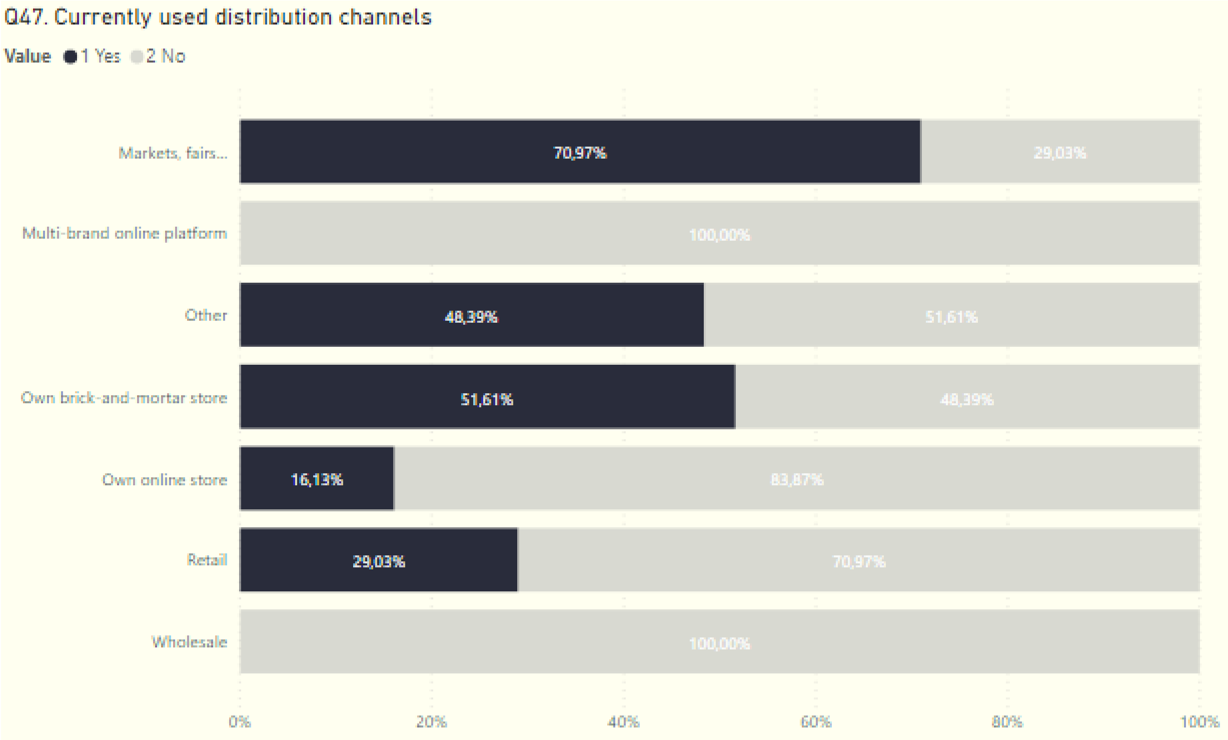
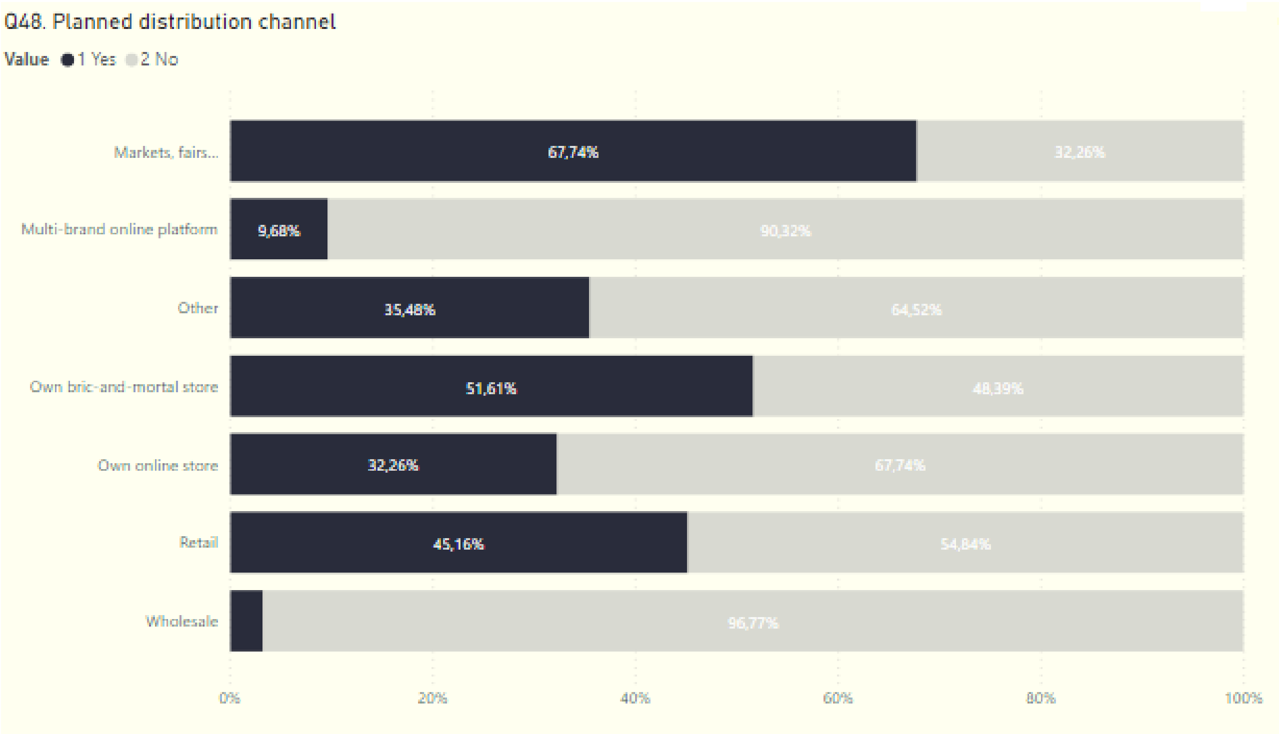


Figure 37 (Austria) Planned distribution channels



6.2. Annexes Czechia

6.2.1. Businesses as existing entrepreneurial capacities – graphical overview

Figure 1 (Czechia) Sample – Legal form of respondents

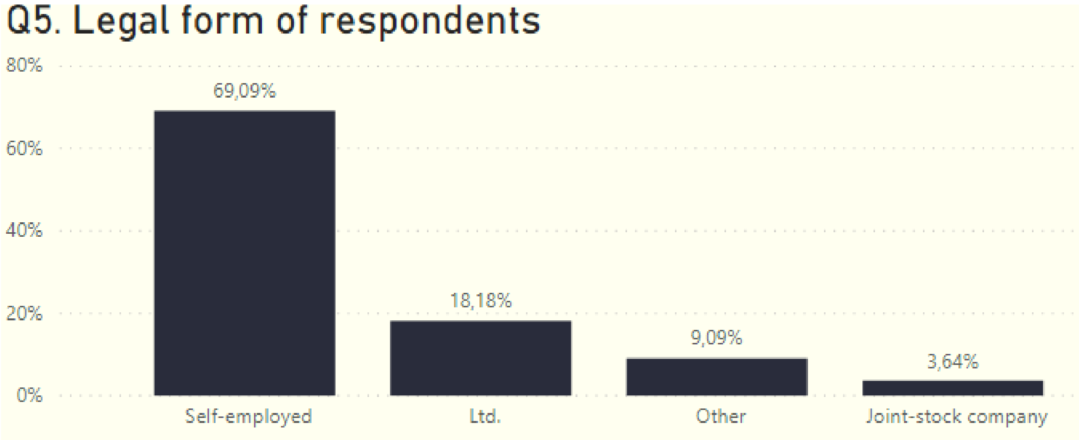


Figure 2 (Czechia) Sample – Length of managing business

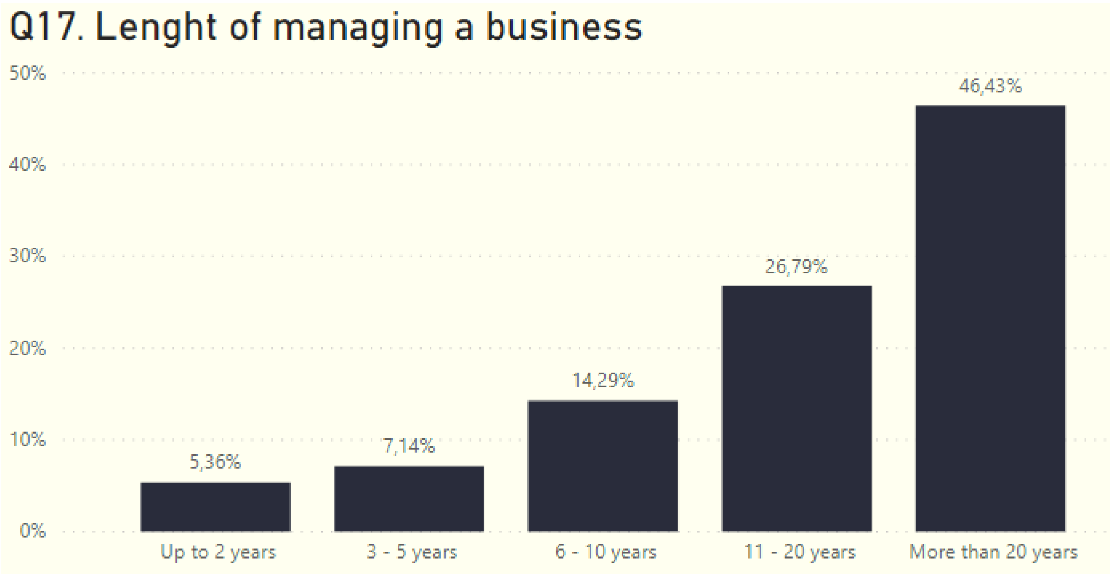


Figure 3 (Czechia) Situation in ceramic sector

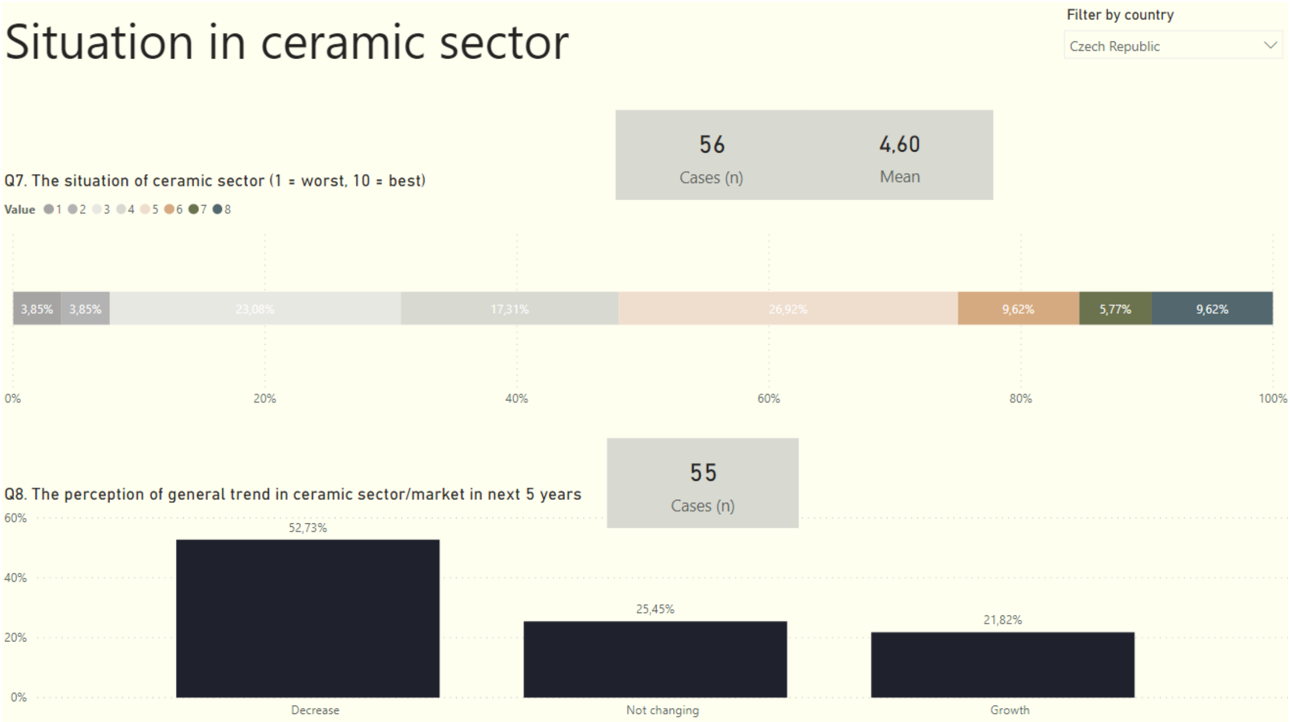


Figure 4 (Czechia) Level of cooperation

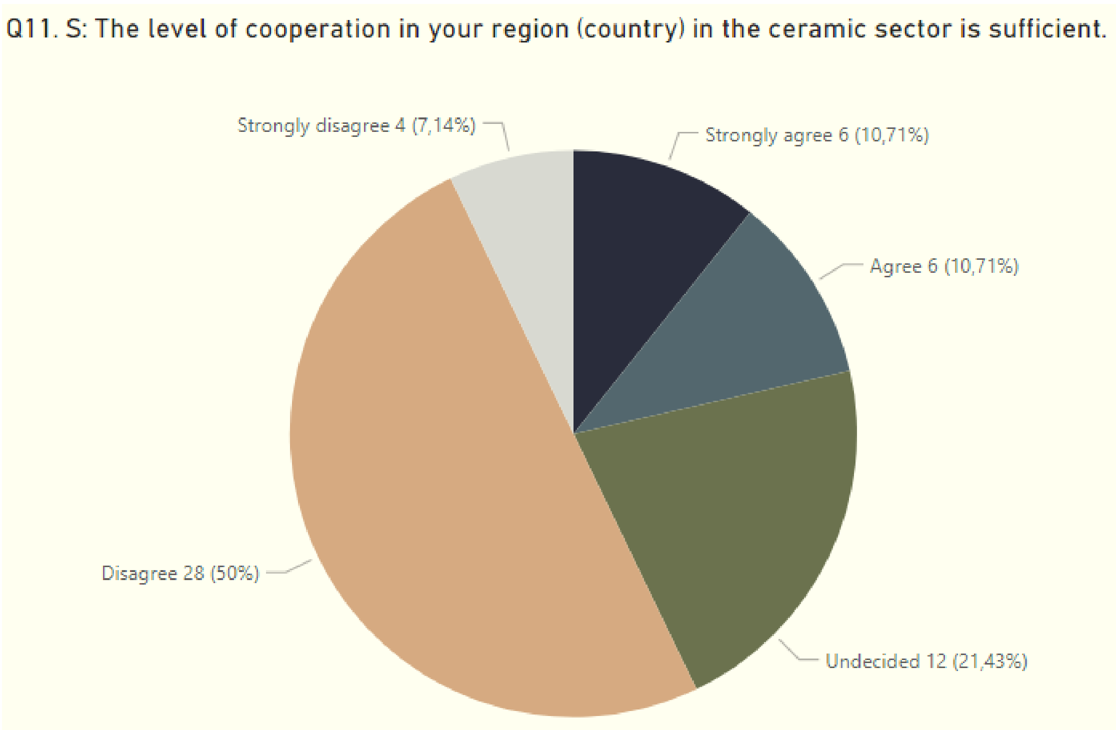


Figure 5 (Czechia) Membership in an association

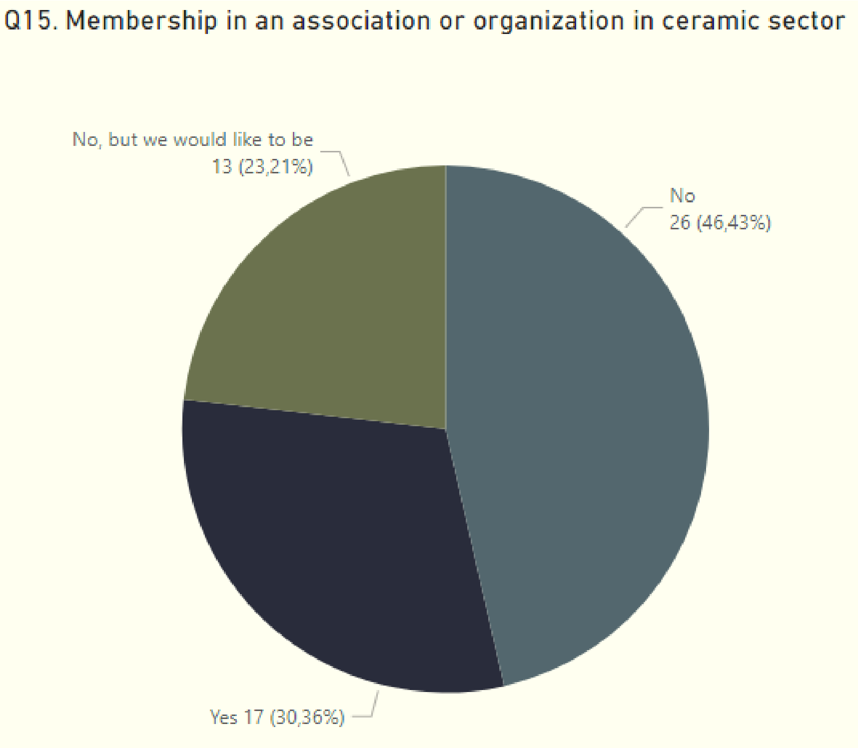


Figure 6 (Czechia) Membership in an association

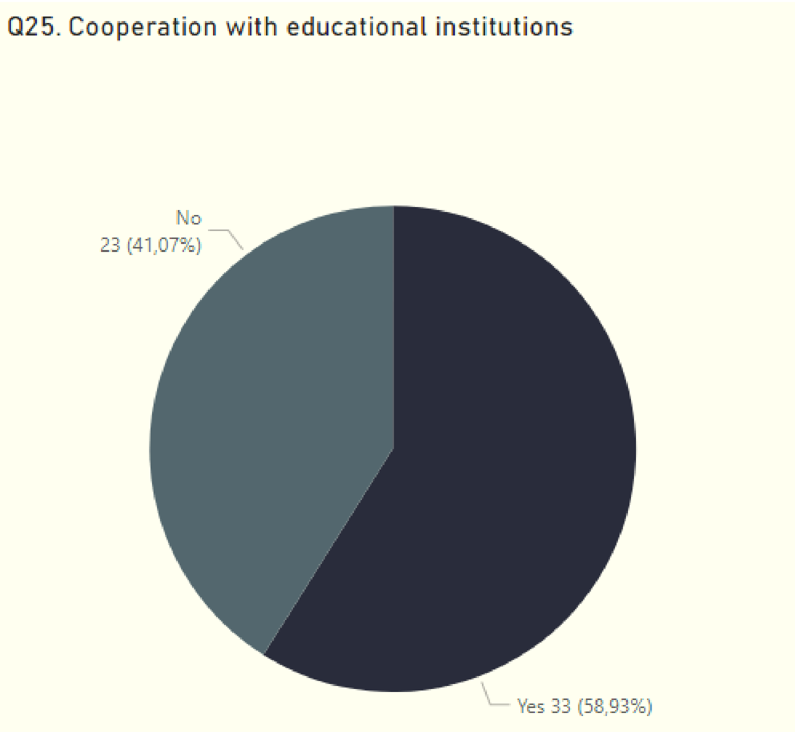


Figure 7 (Czechia) Employee and self-training

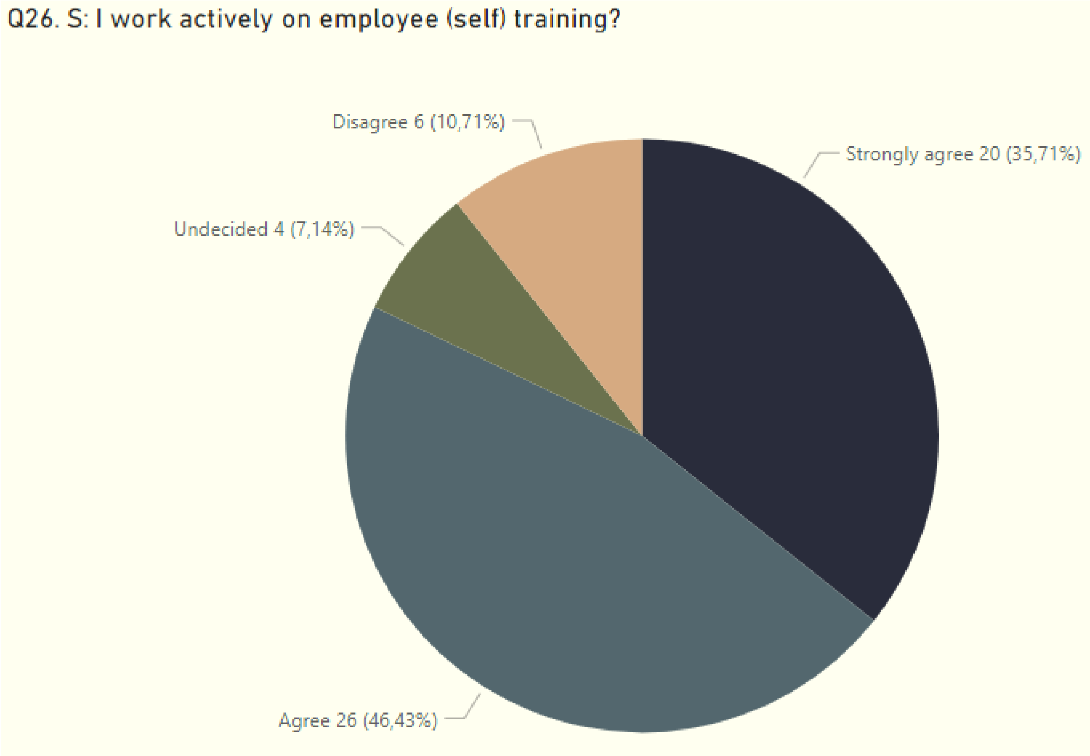


Figure 8 (Czechia) Further education and training topics (craft and design skills)

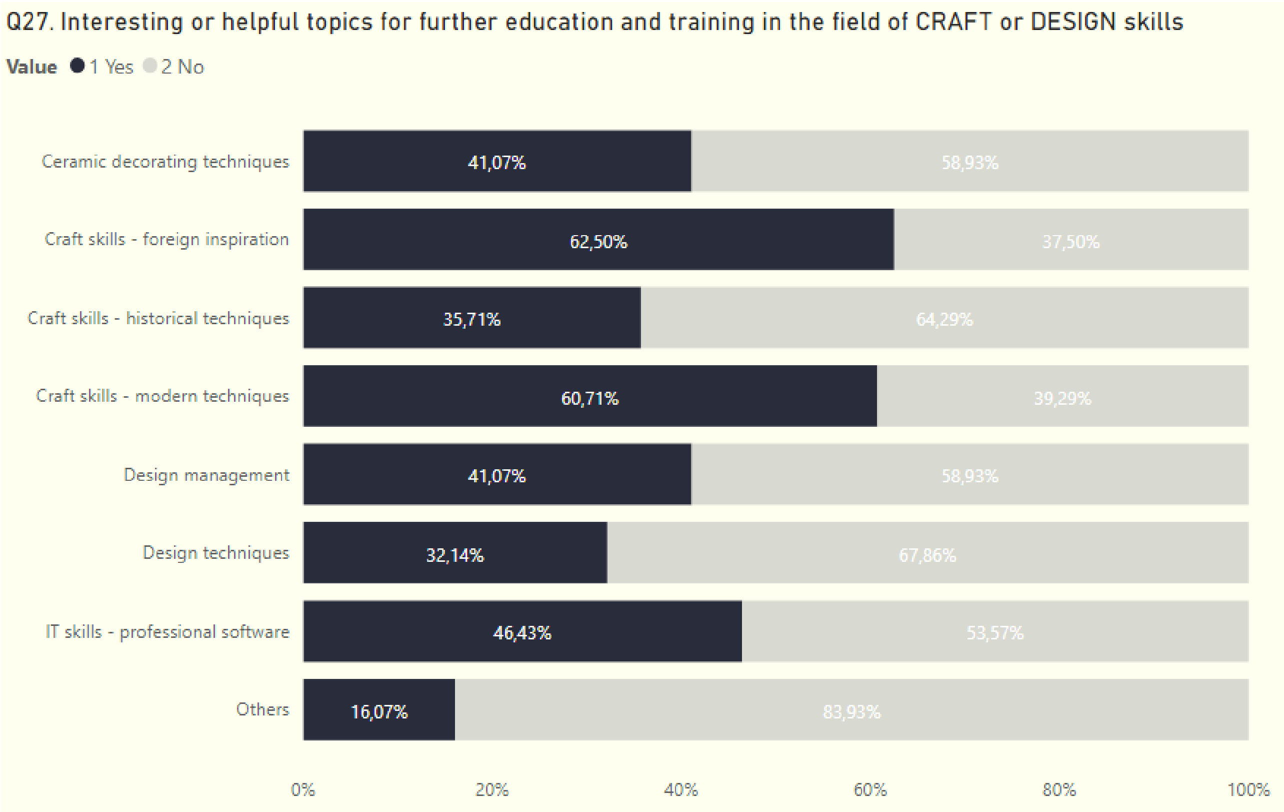


Figure 9 (Czechia) Further education and training topics (management, marketing, and business skills)

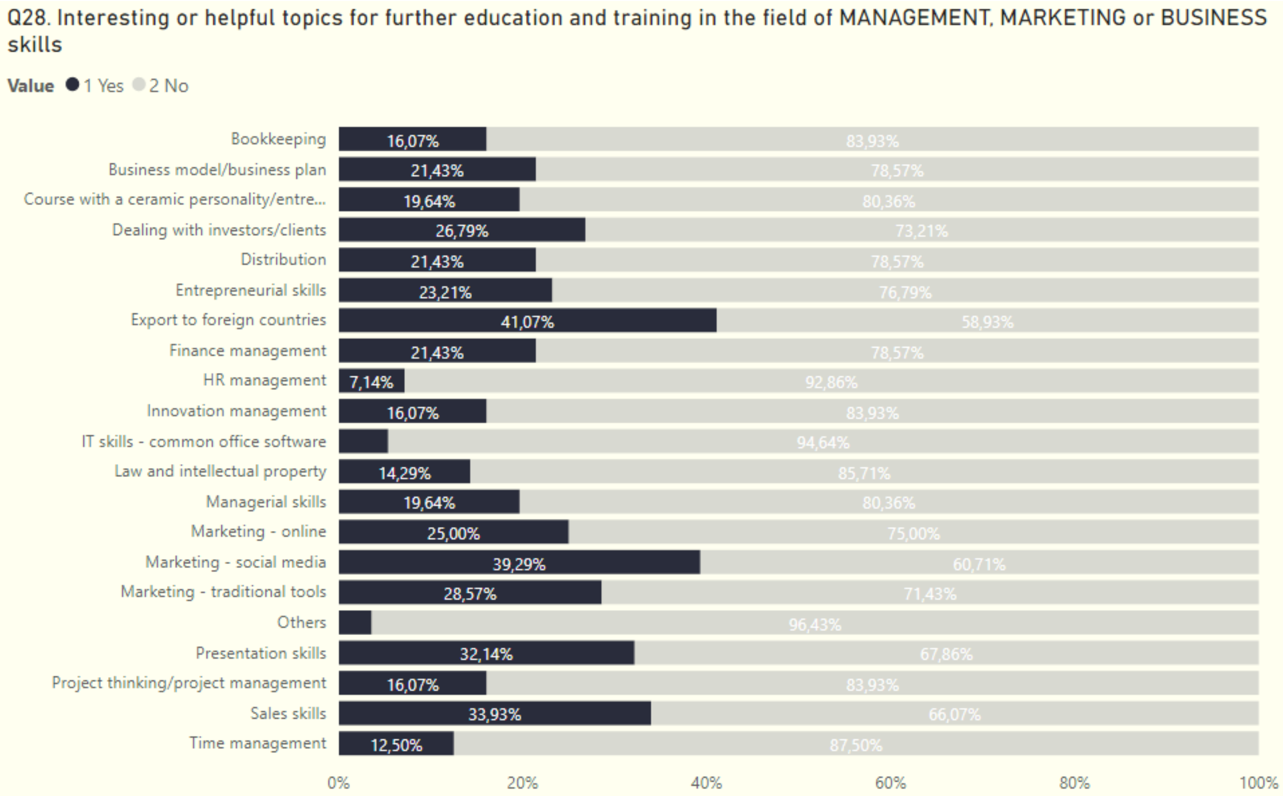


Figure 10 (Czechia) Participating in marketing activities in the city/region/country

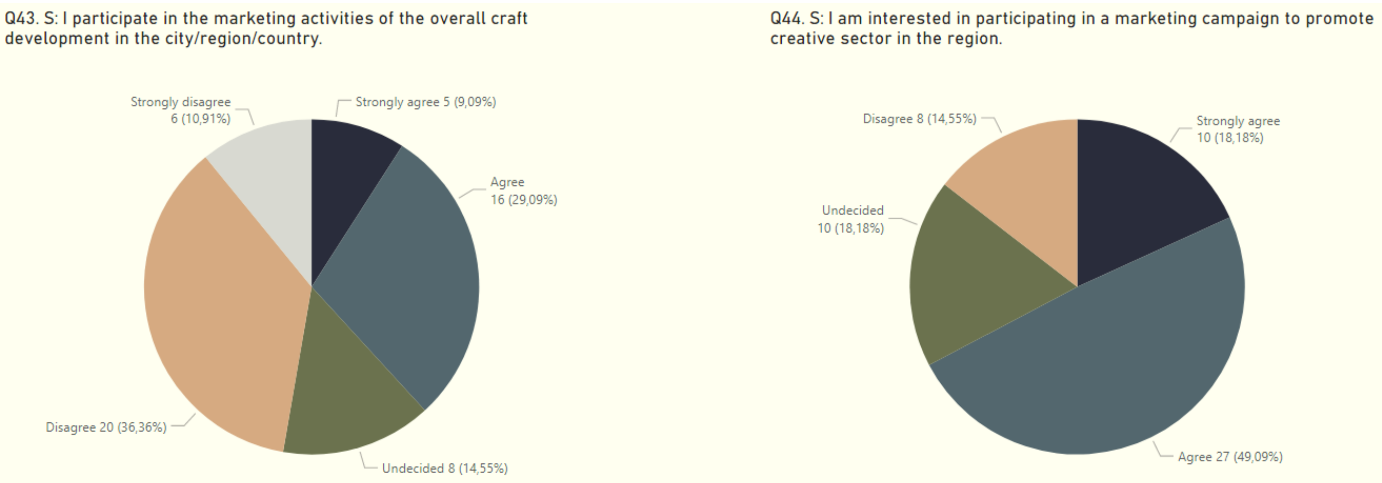


Figure 11 (Czechia) A need of international portal about ceramics

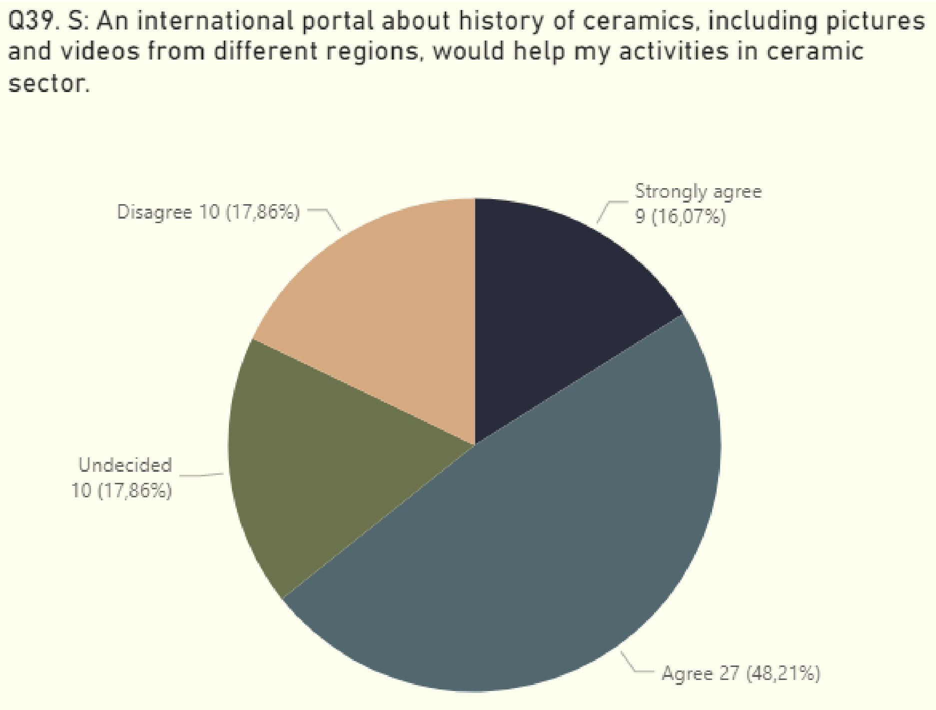
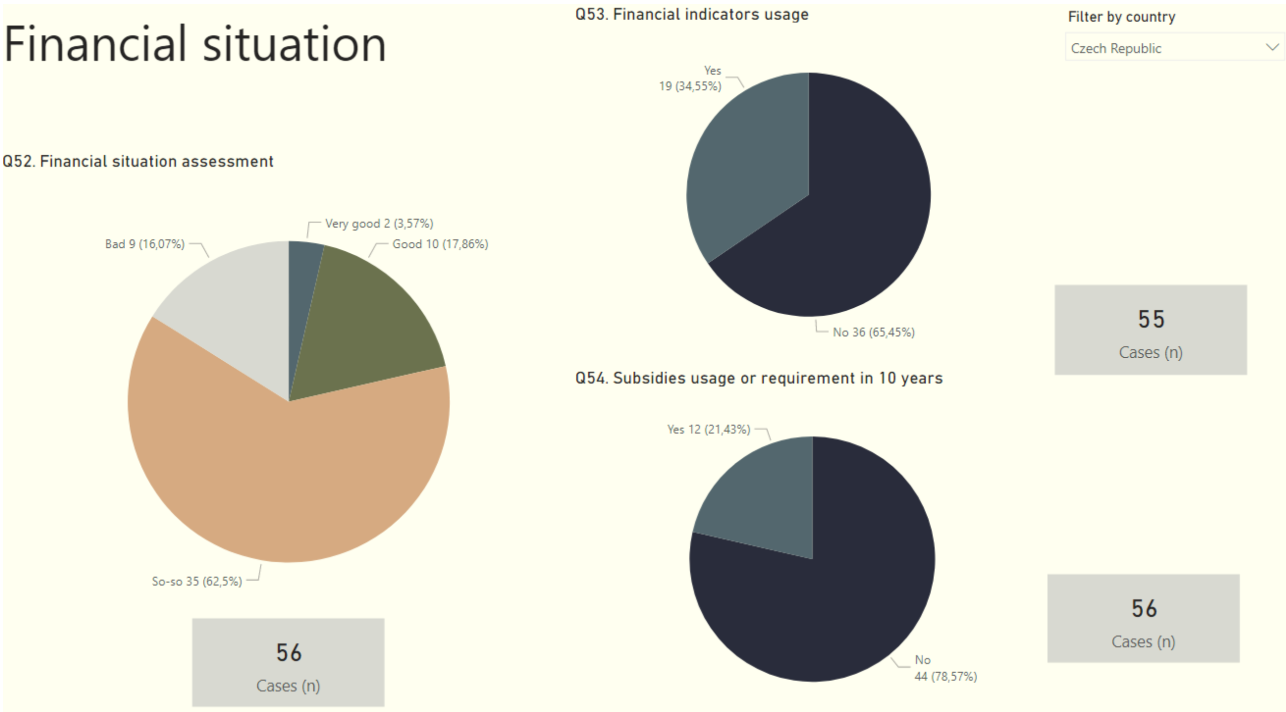


Figure 12 (Czechia) Financial situation



6.2.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (Czechia) Sample - students

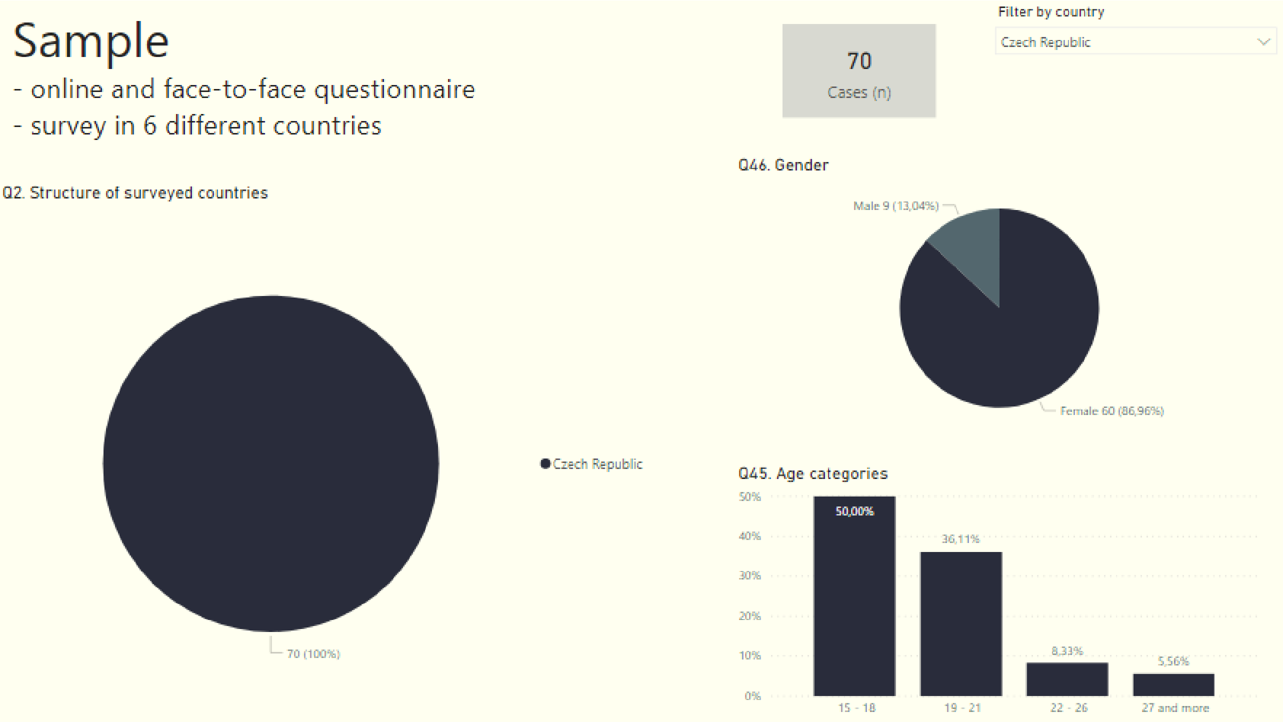


Figure 14 (Czechia) Study direction of students

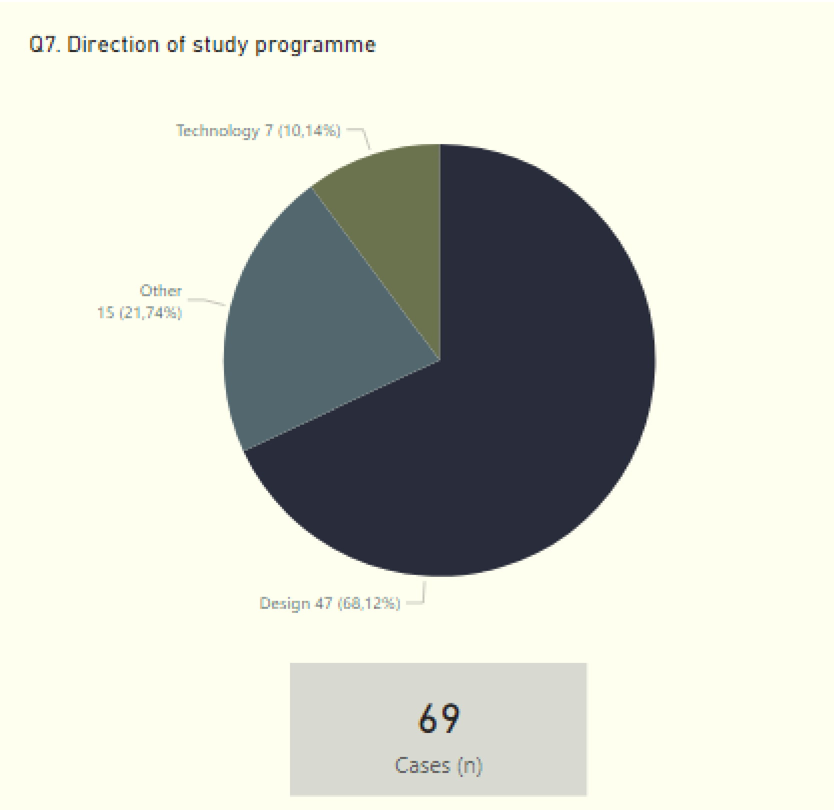


Figure 15 (Czechia) Future direction of students

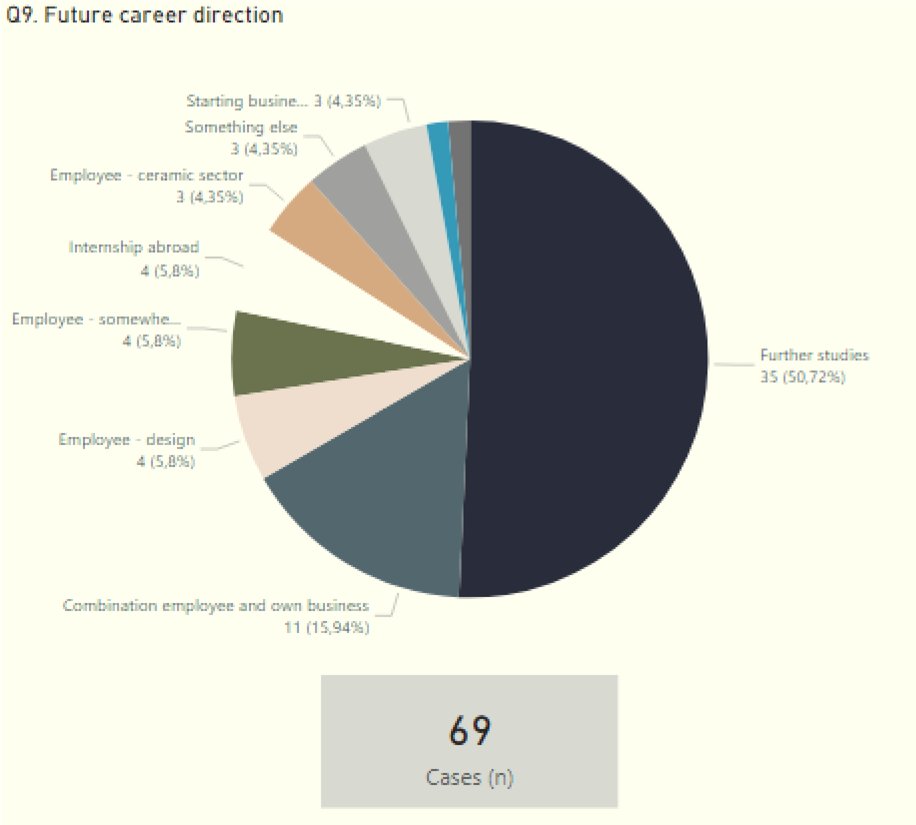


Figure 16 (Czechia) Dream job

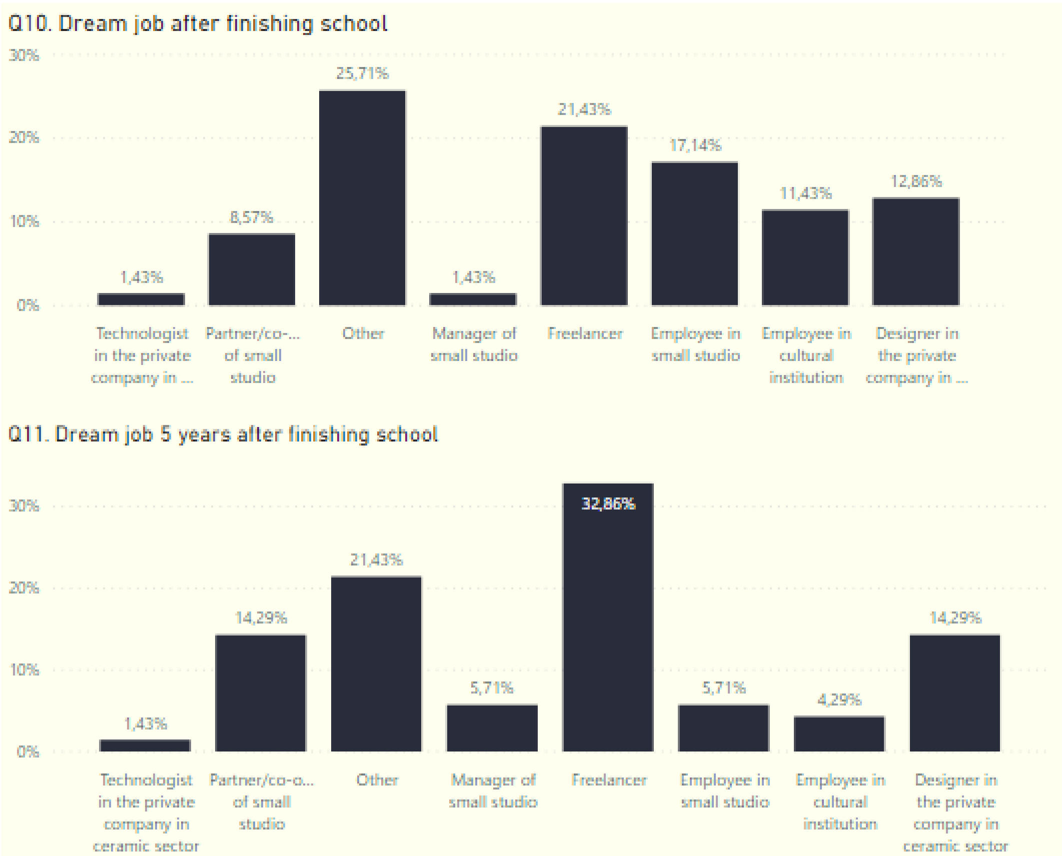


Figure 17 (Czechia) Important students’ knowledge/skills gained

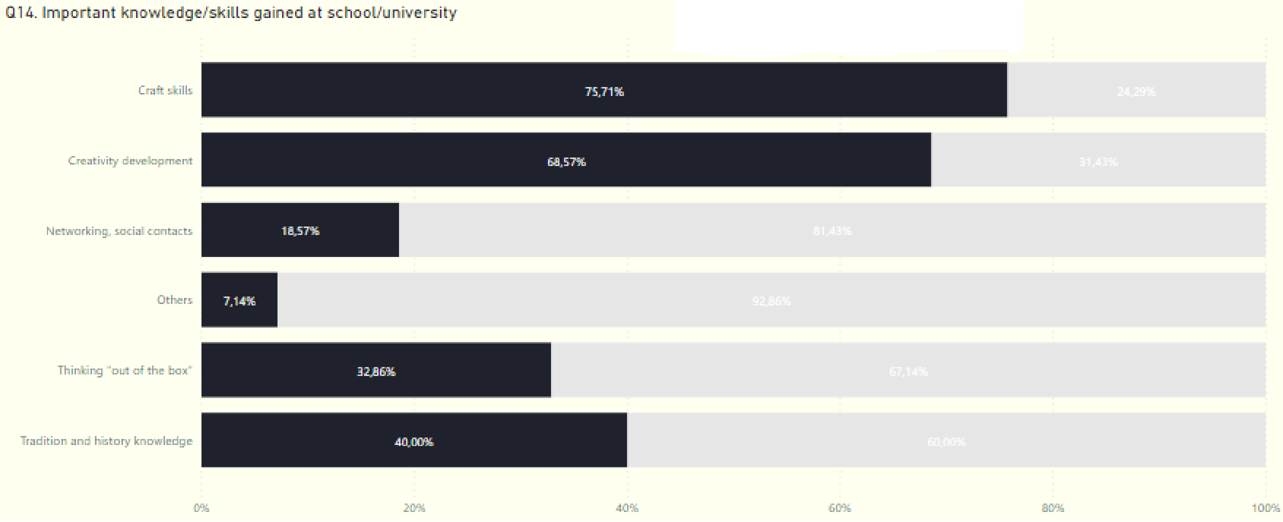


Figure 18 (Czechia) Lack in students’ knowledge

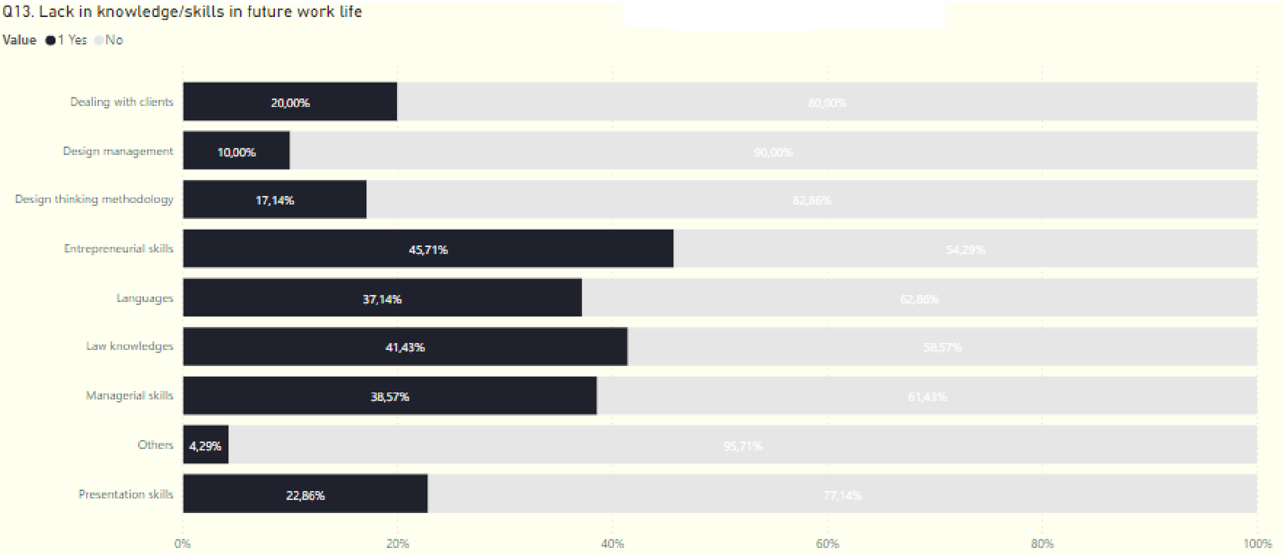


Figure 19 (Czechia) Help with starting own business of finding a job

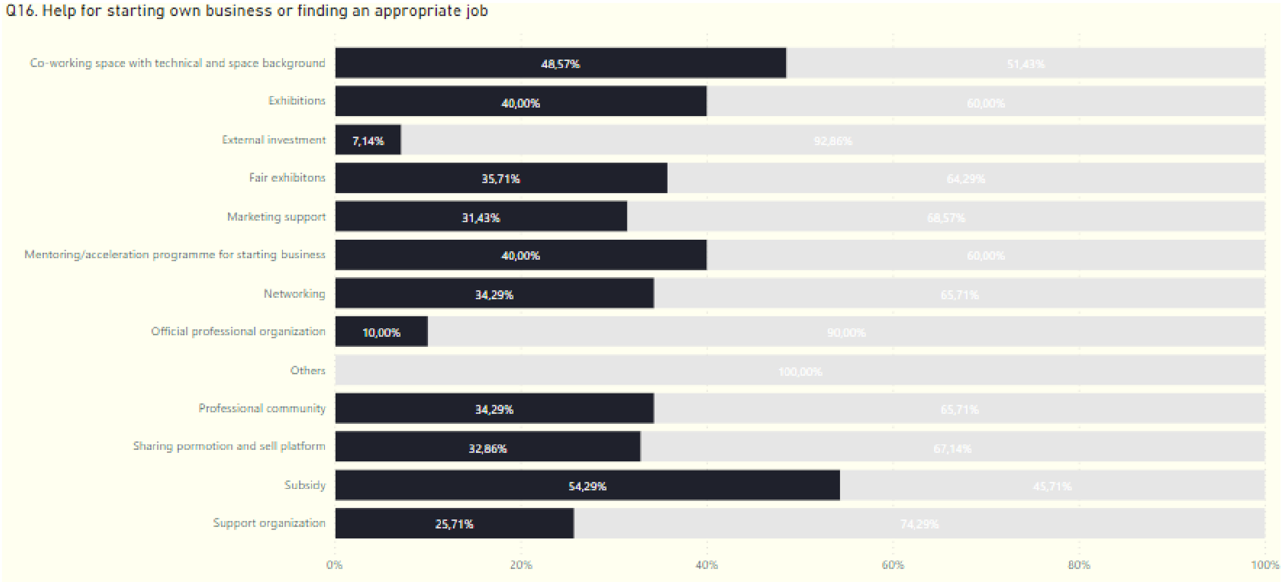
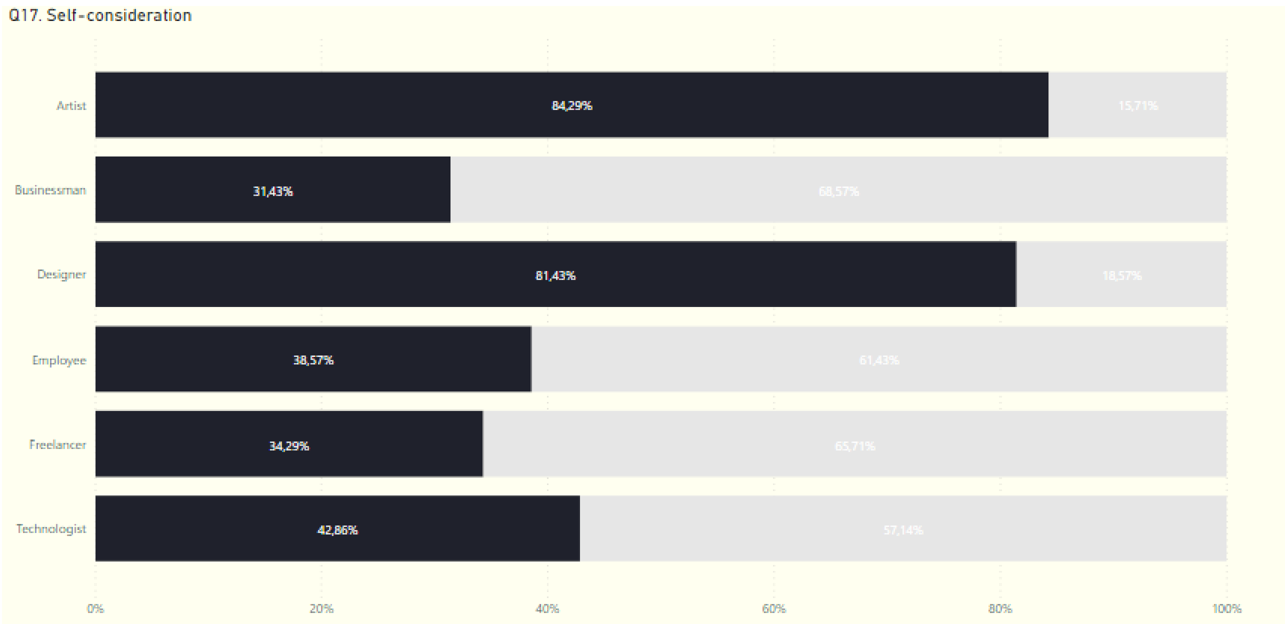


Figure 20 (Czechia) Students' self-consideration



6.2.3. Expectations and needs of stakeholders

Figure 21 (Czechia) Situation in ceramic sector

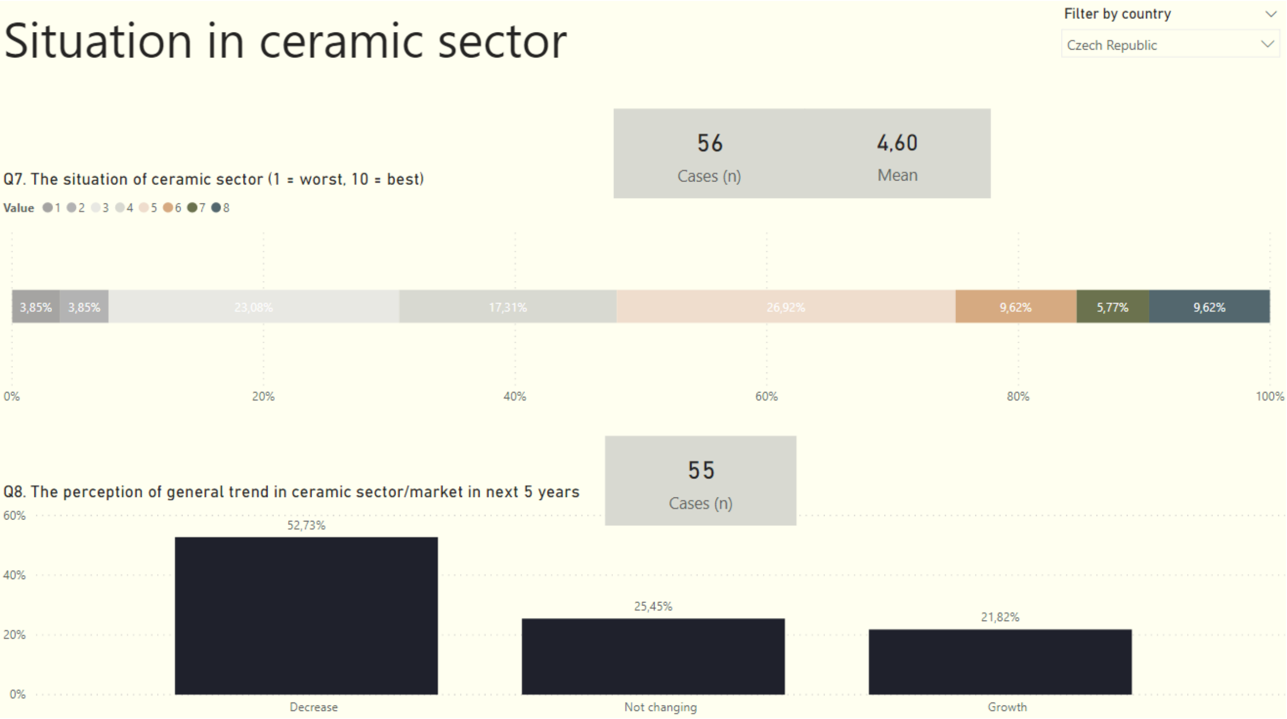


Figure 22 (Czechia) Intensity of current cooperation

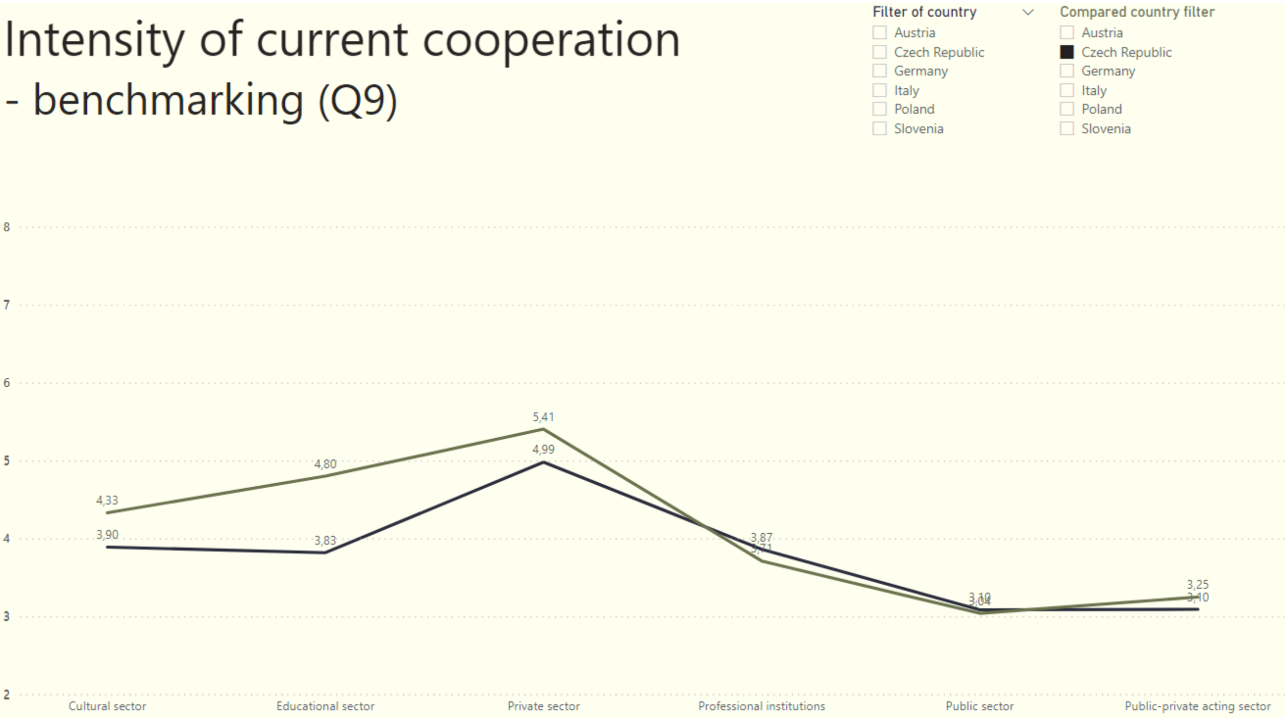


Figure 23 (Czechia) Importance of cooperation

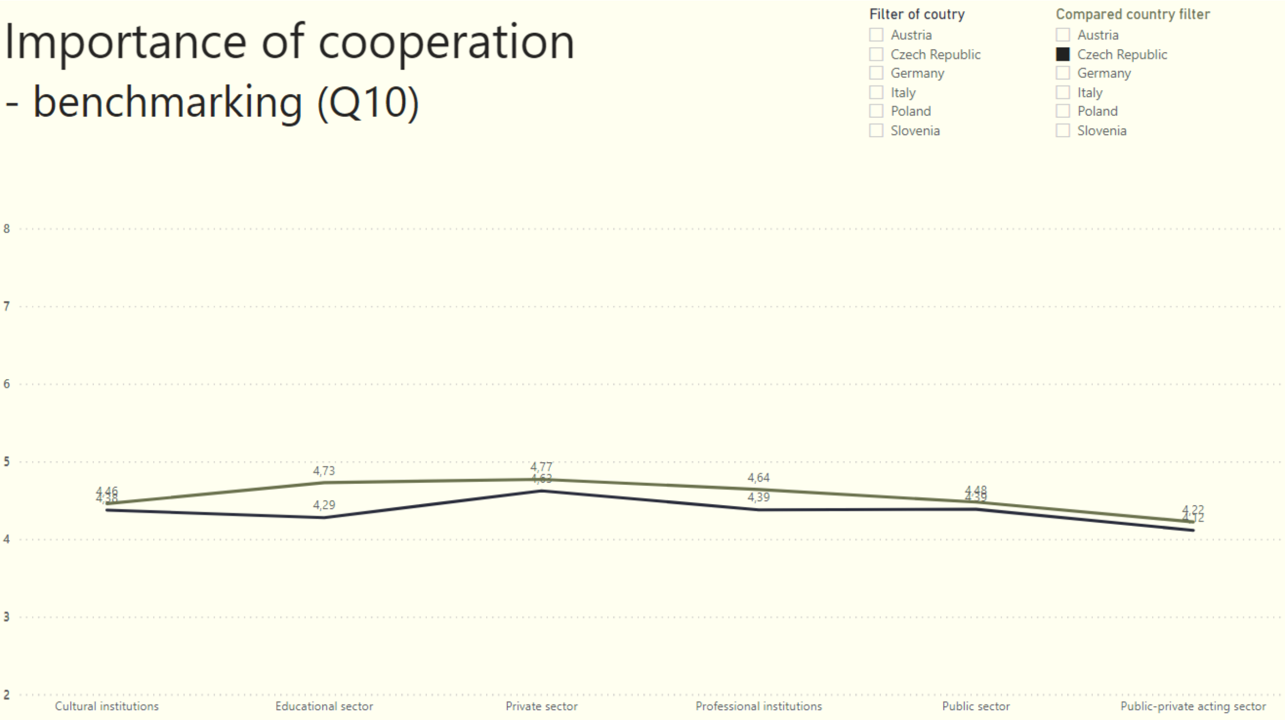


Figure 24 (Czechia) Influence level

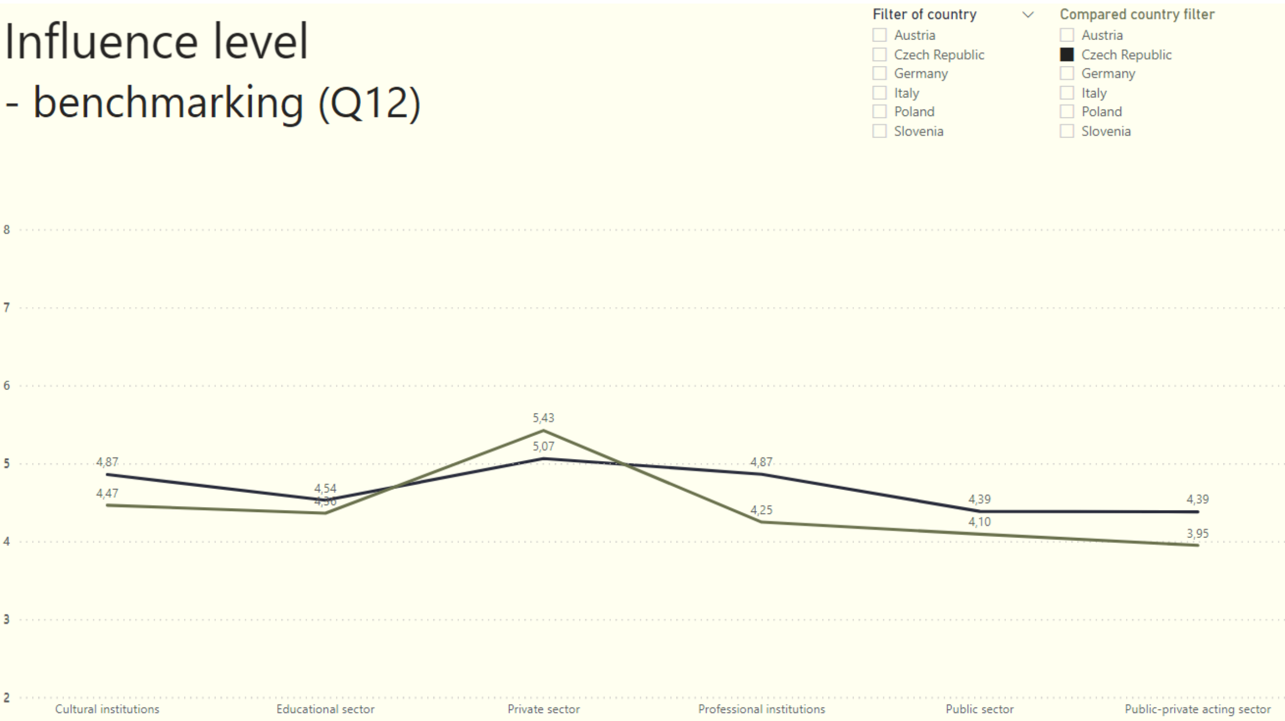


Figure 25 (Czechia) Activities to support the sector

Activities to support the sector (Q13)

49
Cases (n)

Filter by country
Czech Republic

Value	Cases
A truly free market, a satisfied citizen, 2 friends - one old and experienced with a desire to advise and one young with ideas and their cooperation	1
Abolition of electronic sales evidence , greater promotion of crafts (regionally), local store of products with support and promotion, support within the region	1
An association that would sponsor small pottery producers and help them sell abroad.	1
As many porcelain factories closed, the state could subsidize the current "ceramics industry" more	1
Better access to raw materials and information (in czech language)	1
Better training in the field, less bureaucracy - fewer obligations, lower service prices, lower employee fees	1
Cancelling of eletronic sales evidence	1
Ceramics should be percieved as life style item and not consumer good	1
Collection of goods from the region - to maintain the infrastructure, production and development of paving directly at the deposit, increase the quality of products, name and concretize the vision of the development of the porcelain industry, integrate the entire chain - connect to dealers. Political support for investment, innovating factories from the ground up. Then there are the possibilities of 3D printing.	1
Constructive conception of ceramic industry in CZ, scholarships for start-up ceramists, development of organisations like CZ Design Center, Czech Fund of fine artists etc.	1
Cooperation withe sectors	1
Copyright and patent protection. Legal representation in disputes. Support us foreign market-representation.	1
Definitely cooperation across disciplines and sectors. Also work with the public, with the widest range of people. Establishment of various initiatives and activities, festivals and also their support from grants and so on. Have a way to present ceramics at all.	1
Duties on cheap ceramic products from Asia	1
Education development, research, state support of the industry.	1
Education of potters focused on private small workshops, not industry. Public education about modern craftsmanship. Relief from unnecessary bureaucracy.	1
Education, economic situation in the Czech Republic, popularization of ceramics in the media ...	1
Financial support of bigger porcelain companies, all are closing down and small producers have less chances for firing their products	1
Greater cooperation between the private and public sectors and other institutions. Greater cooperation between ceramic schools and companies on the implementation of student designs. Greater support for graduates of ceramic schools, eg the possibility of co-working, eg directly at schools. From the state, more accessible possibilities of subsidies for the equipment of ceramic studios, workshops ...	1
I think it will now take a long time for the situation for small ceramics to improve. It all depends on the state of the economy. It would certainly help if the government did not invent more and more legislation for health certificates and the operation of ceramic workshops and electronic sales evidence.	1
Celkem	**49**

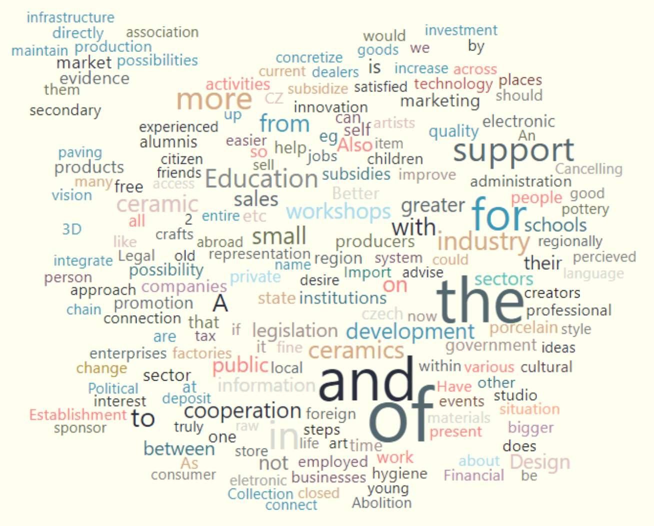


Figure 26 (Czechia) Level of cooperation

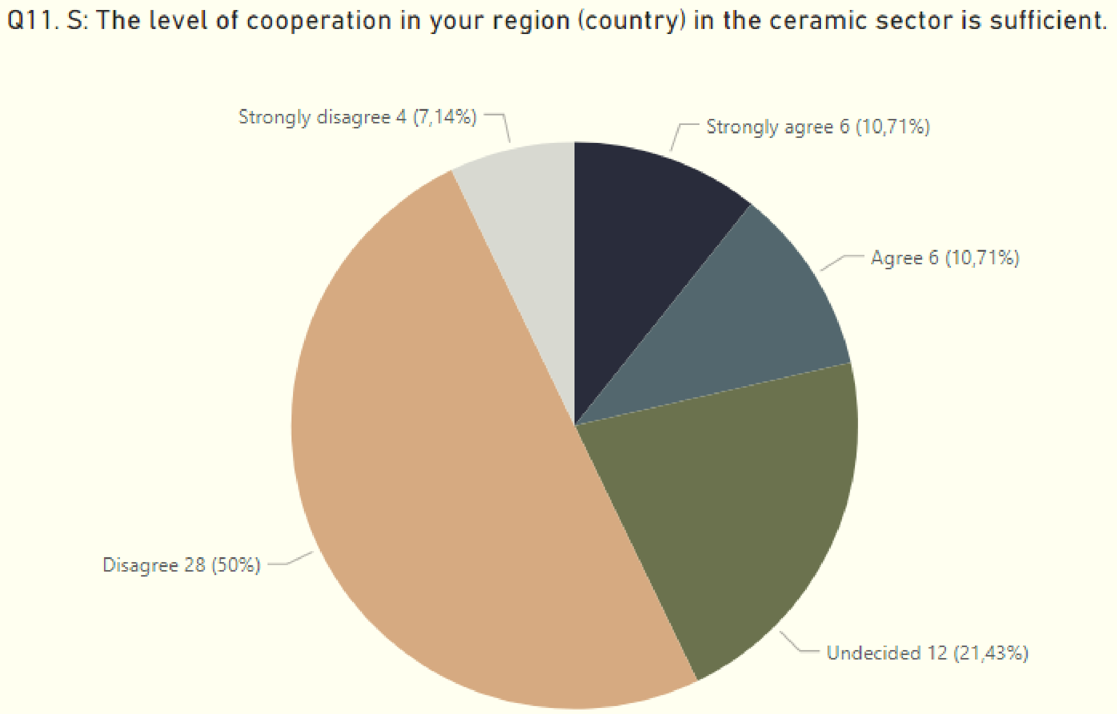


Figure 27 (Czechia) Support or cooperation

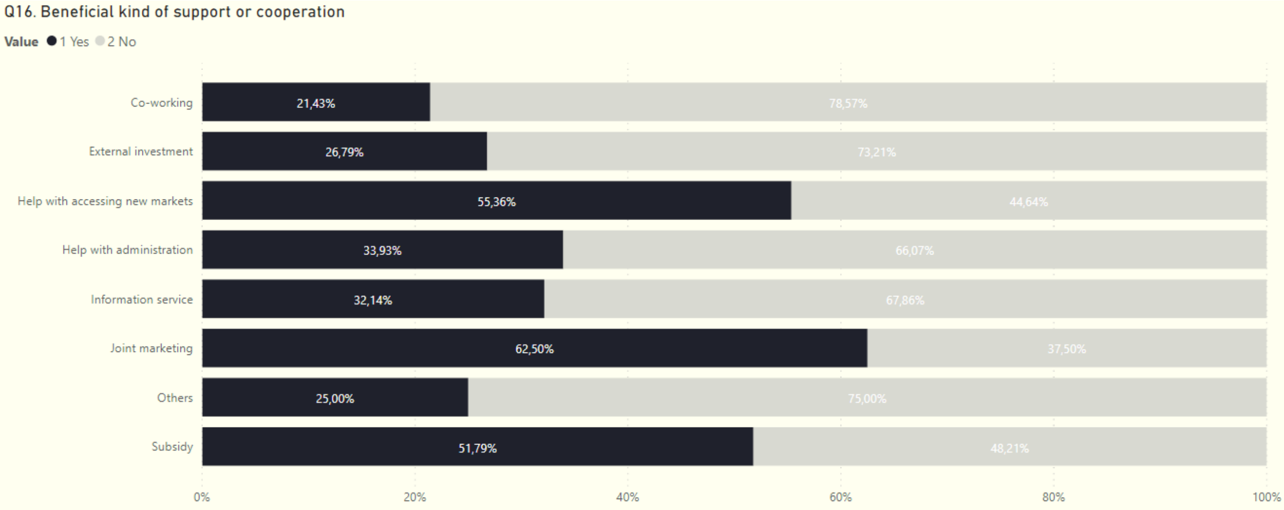


Figure 28 (Czechia) Attitude towards a statement

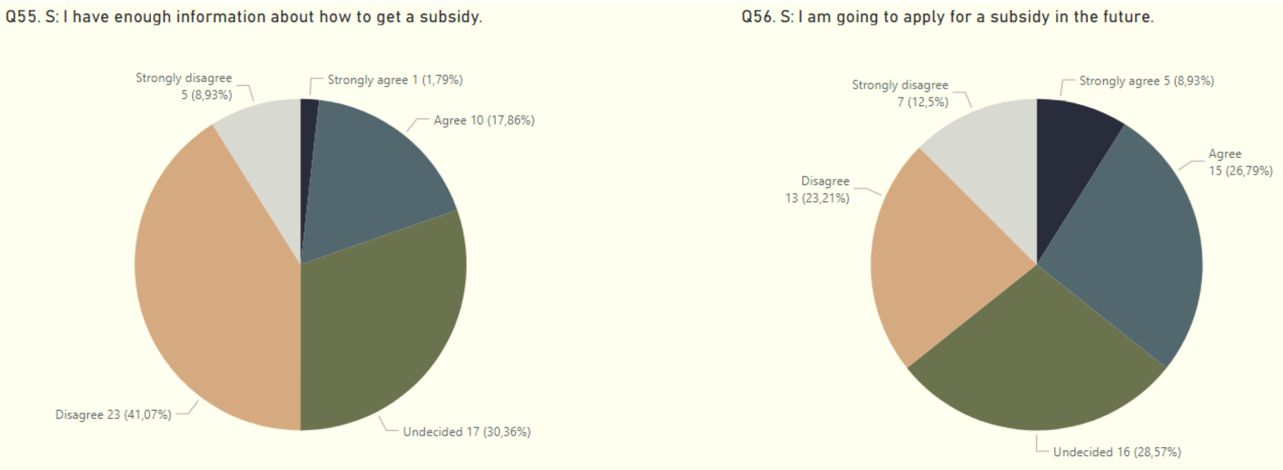
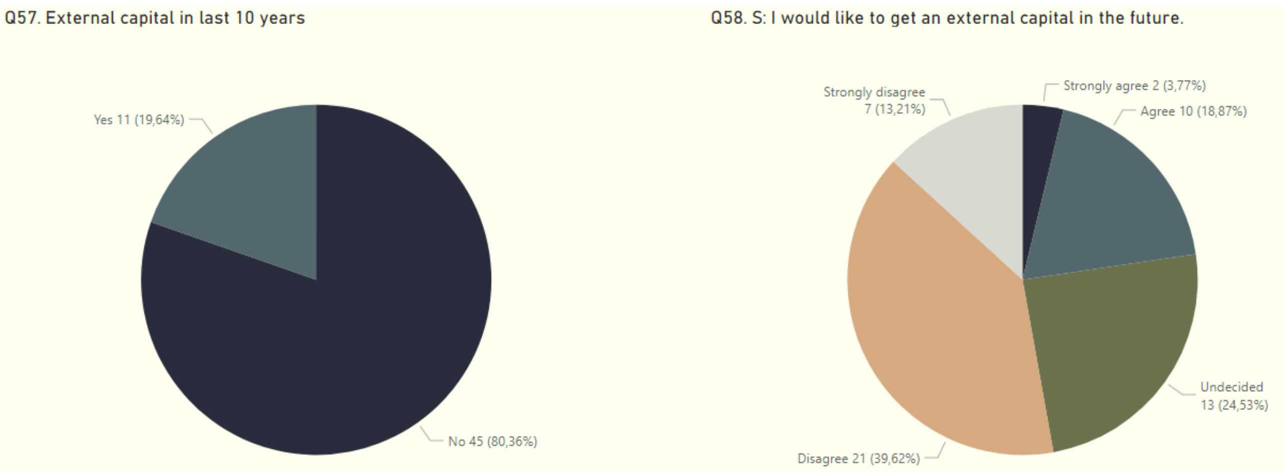


Figure 29 (Czechia) Financial situation, attitude towards a statement



6.2.4. Marketing activities

Figure 30 (Czechia) Currently used marketing activities

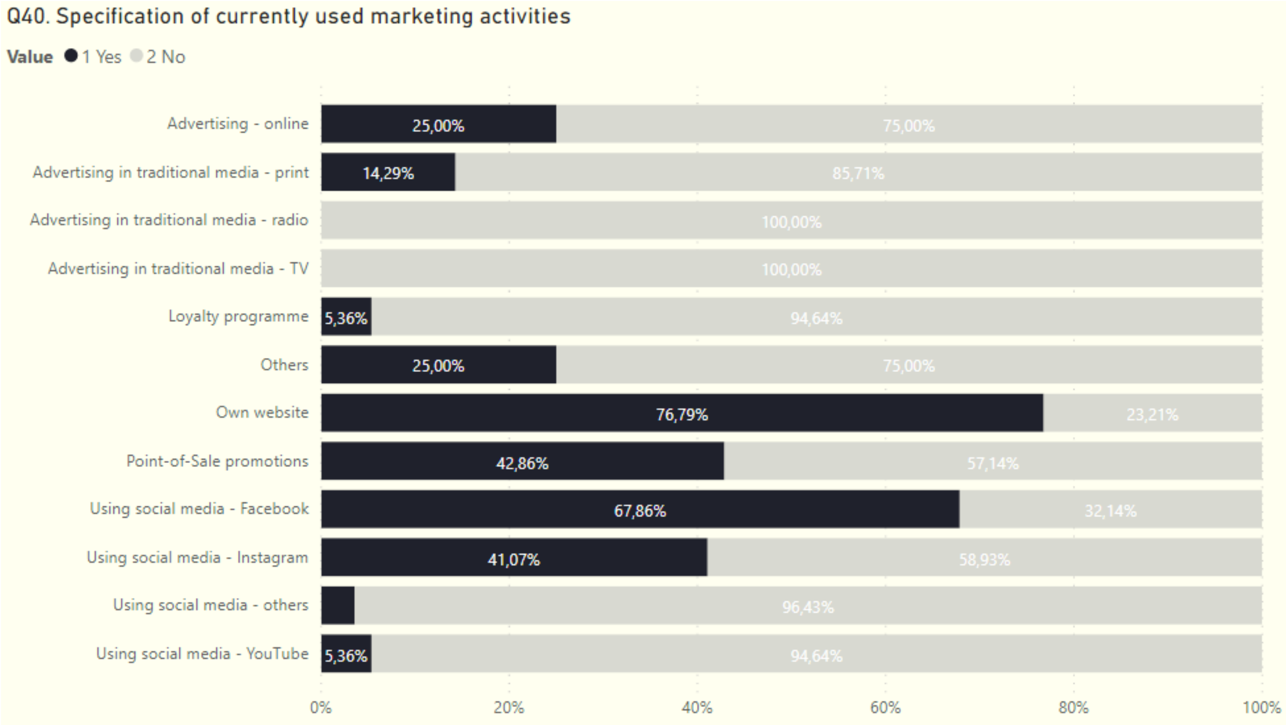


Figure 31 (Czechia) Marketing activities planned for the future

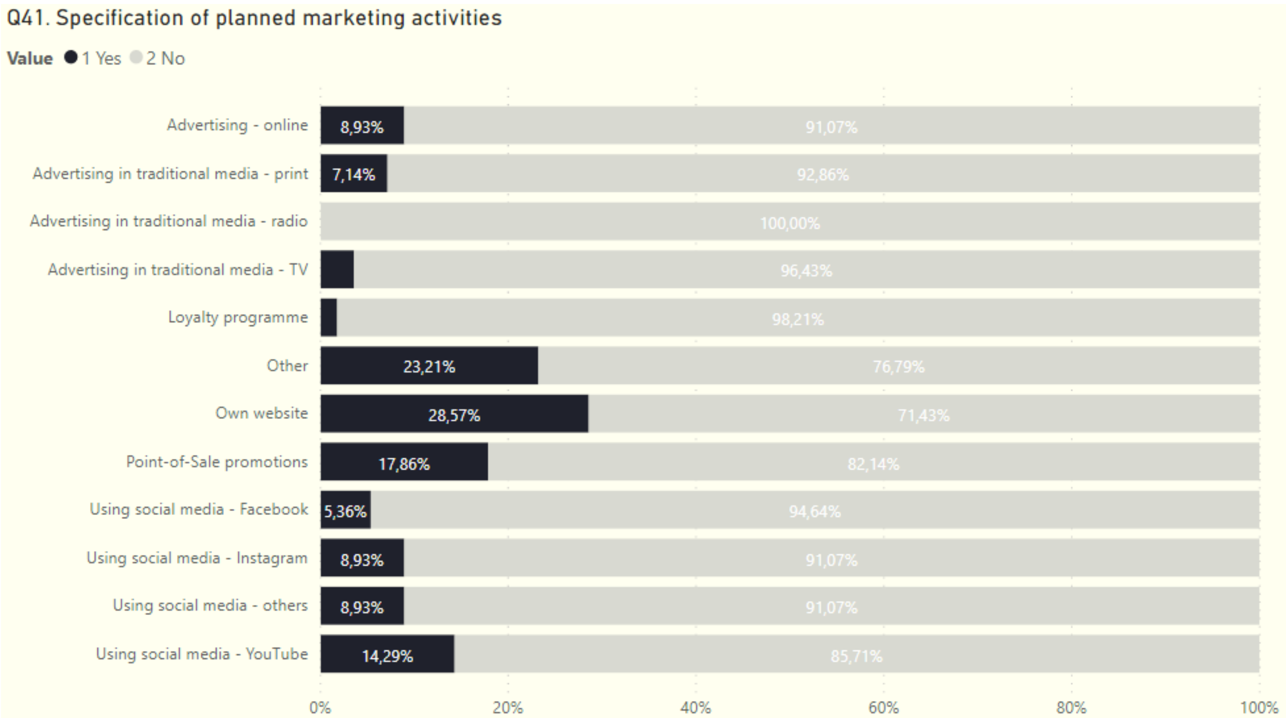


Figure 32 (Czechia) Responsibility for marketing activities

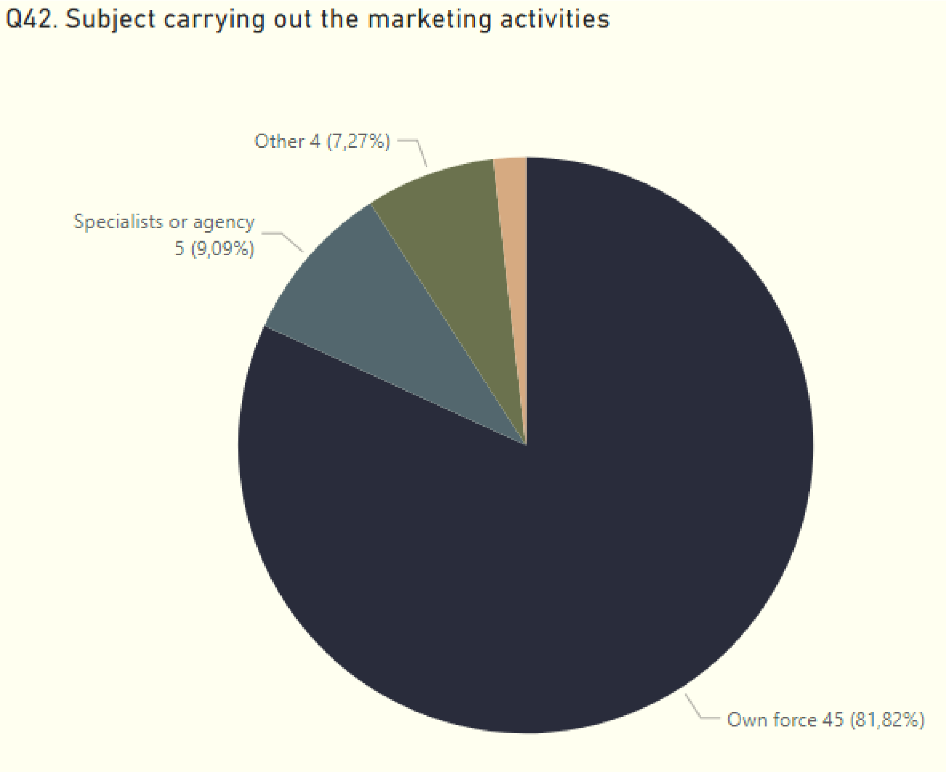


Figure 33 (Czechia) Participating in the marketing activities

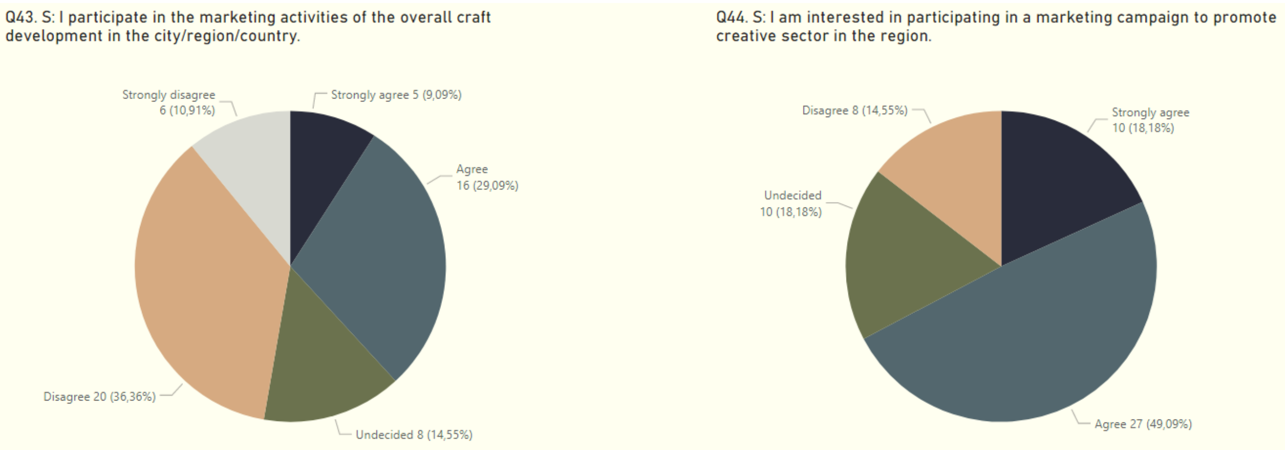


Figure 34 (Czechia) Marketing activities on social networks

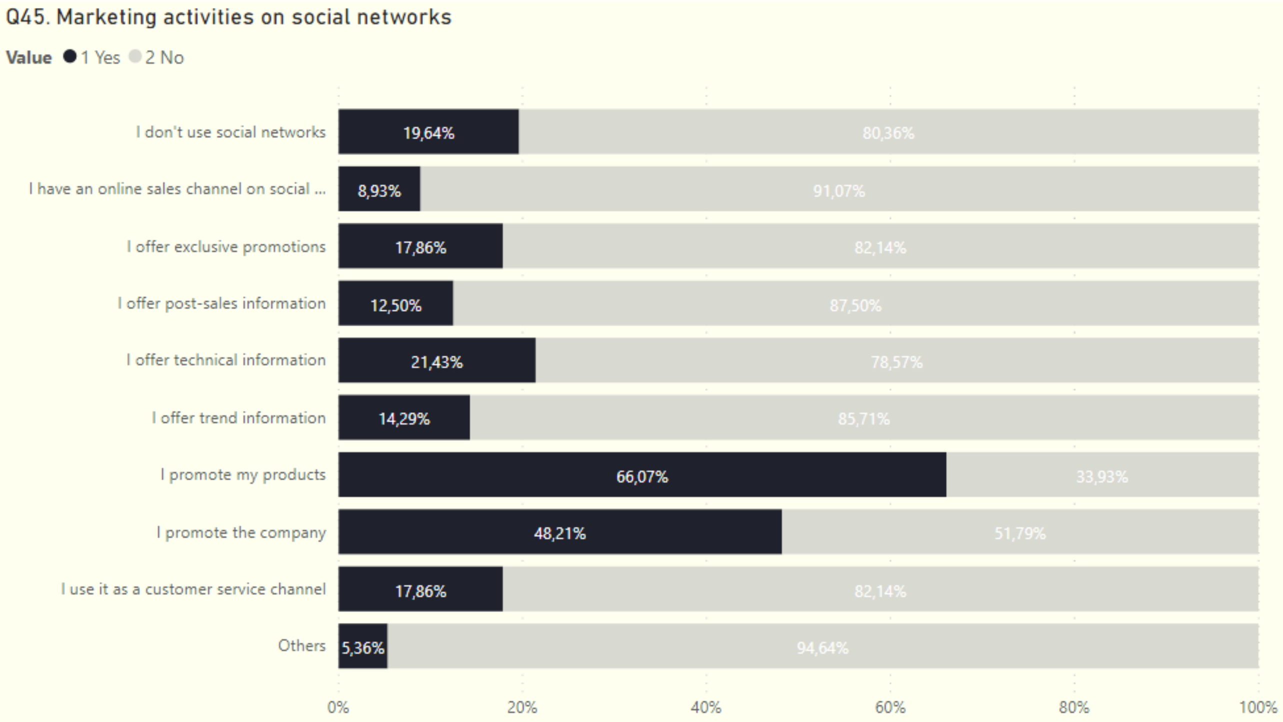


Figure 35 (Czechia) Feedback on social media

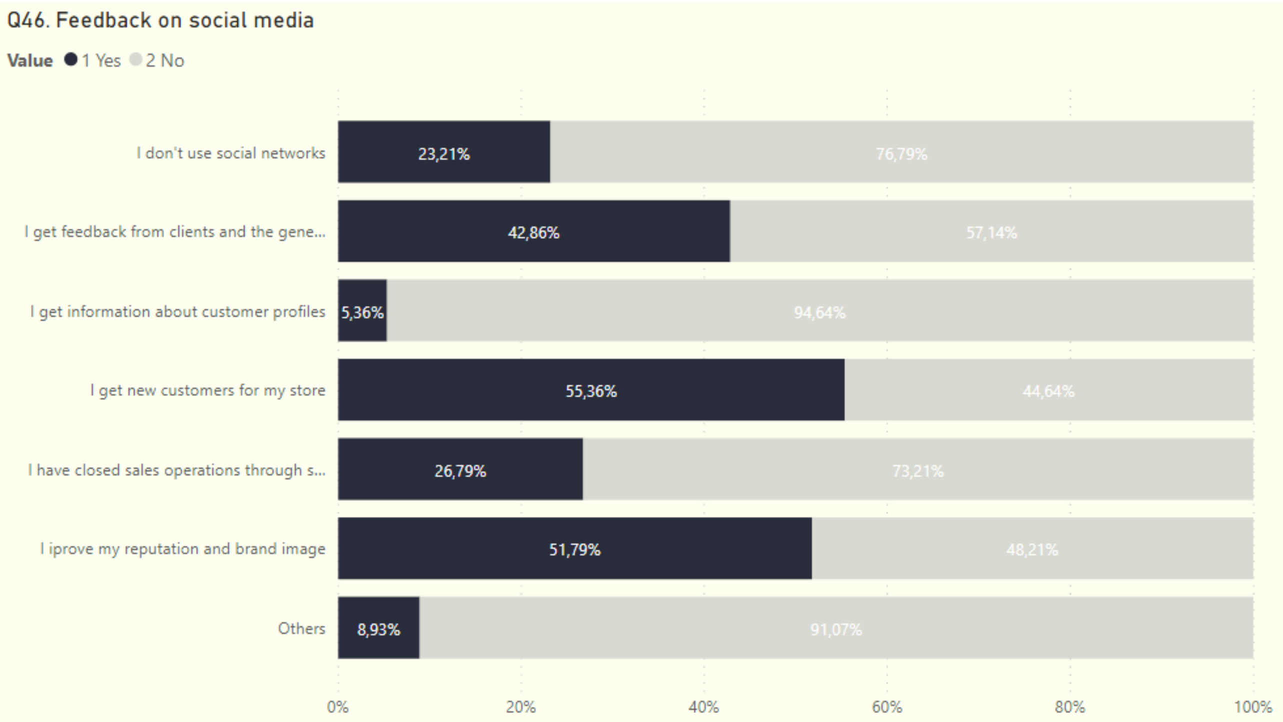


Figure 36 (Czechia) Currently used distribution channels

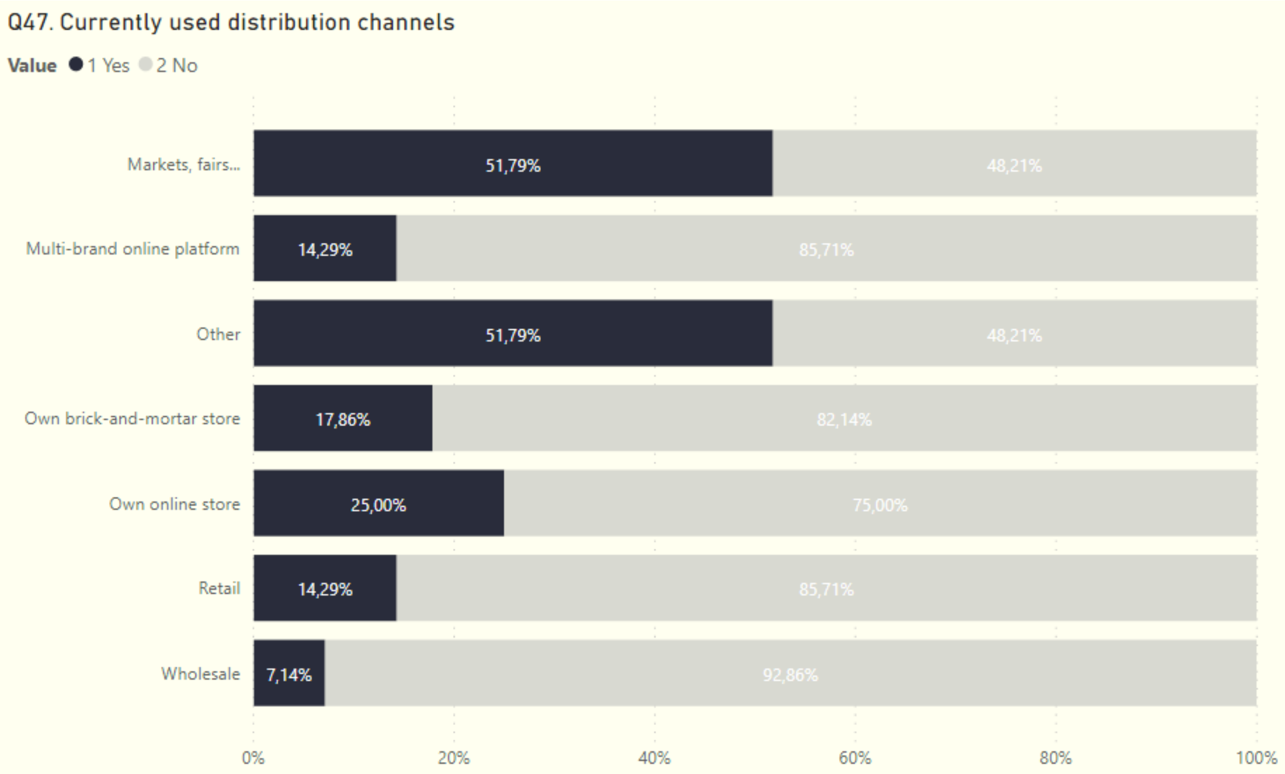
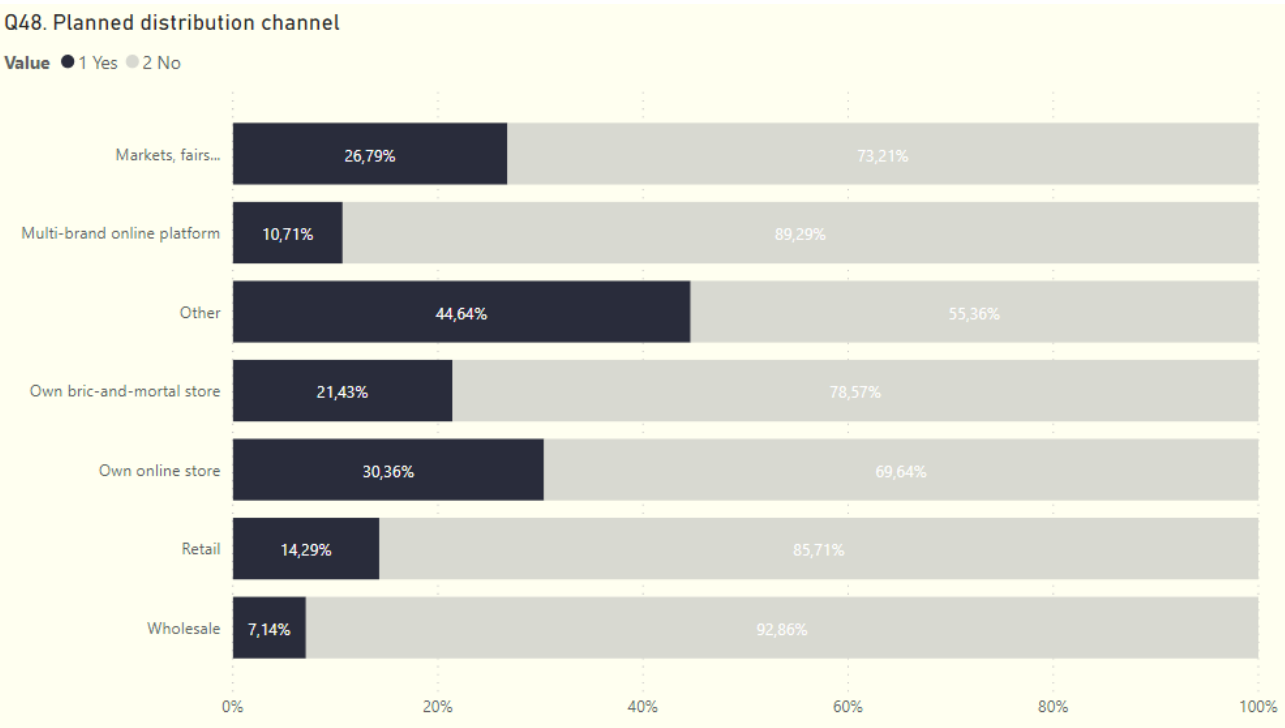


Figure 37 (Czechia) Planned distribution channels



6.3. Annexes Germany

6.3.1. Businesses as existing entrepreneurial capacities – graphical overview

Figure 1 (Germany) Sample – Legal form of respondents

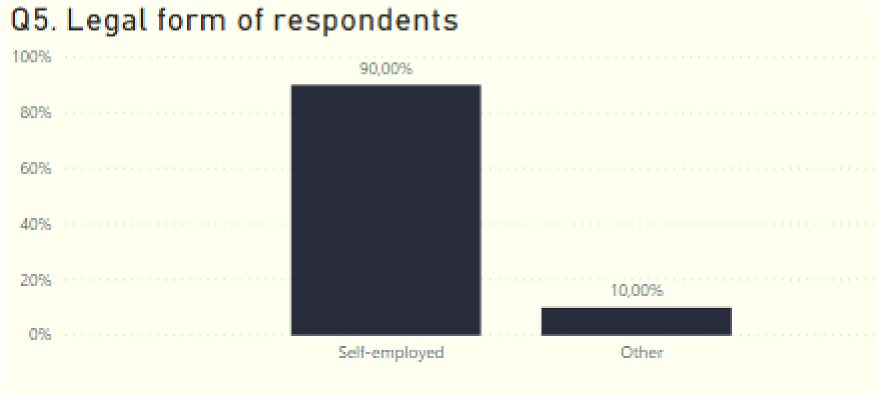


Figure 2 (Germany) Sample – Length of managing business

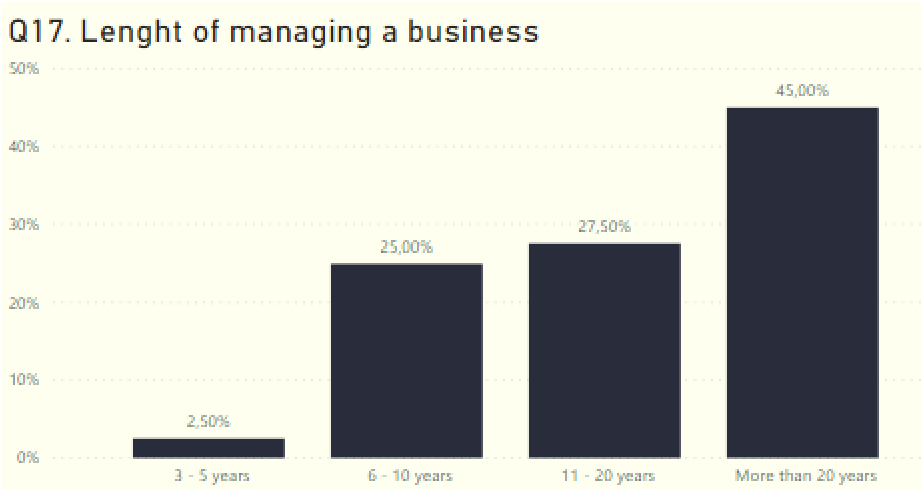


Figure 3 (Germany) Situation in ceramic sector

Figure 4 (Germany) Level of cooperation

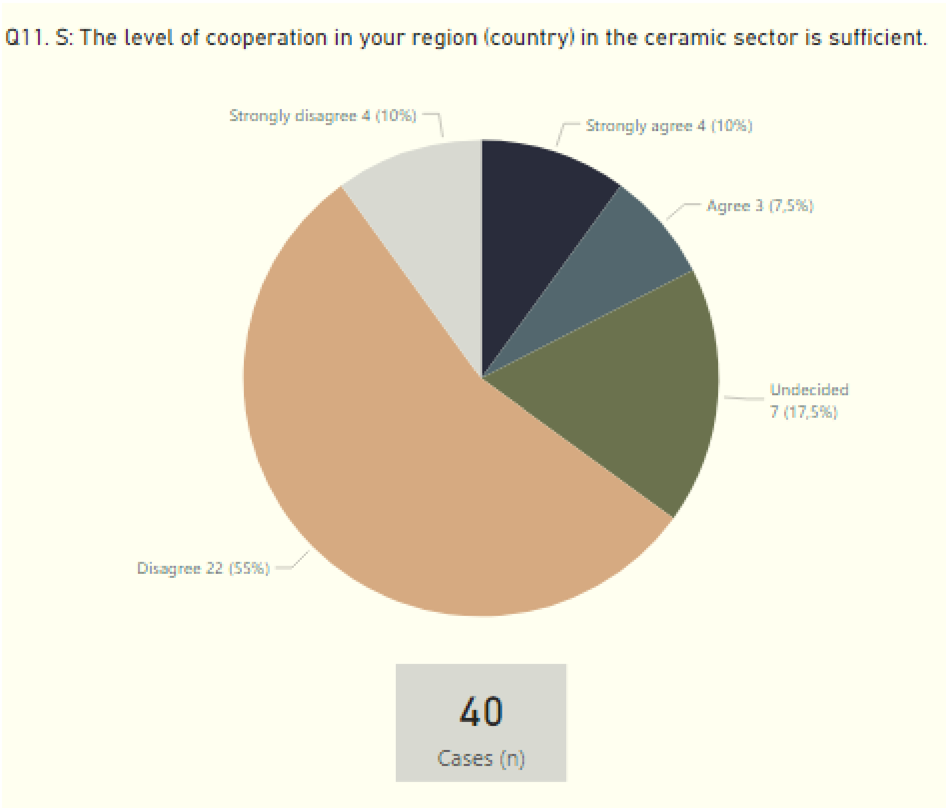


Figure 5 (Germany) Membership in an association

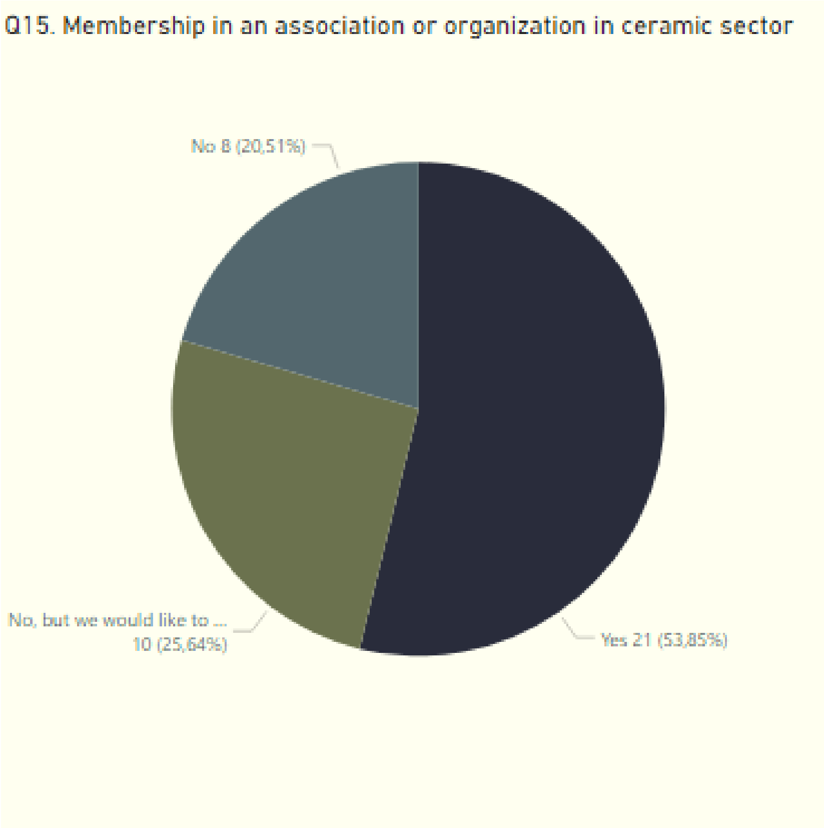


Figure 6 (Germany) Membership in an association

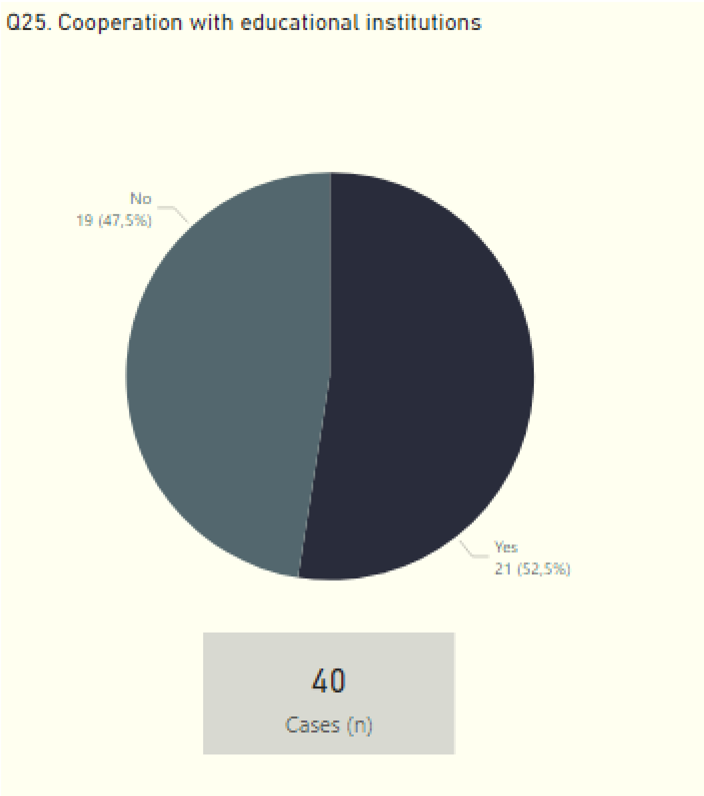


Figure 7 (Germany) Employee and self-training

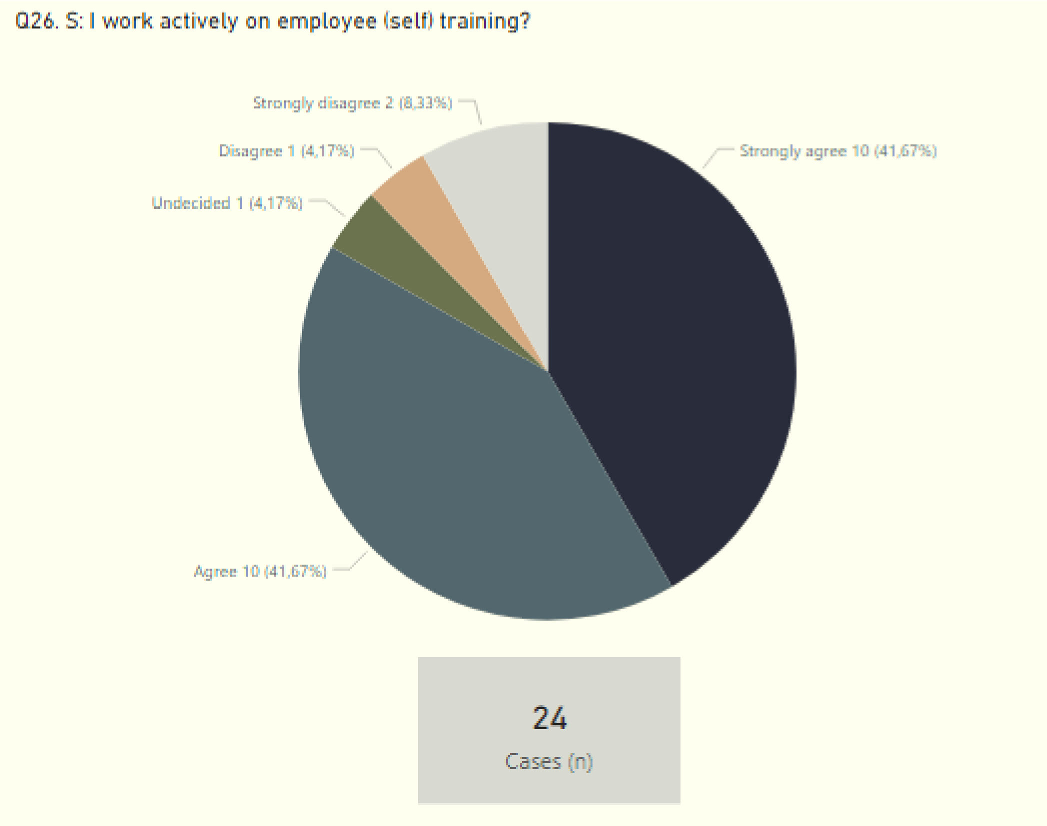


Figure 8 (Germany) Further education and training topics (craft and design skills)

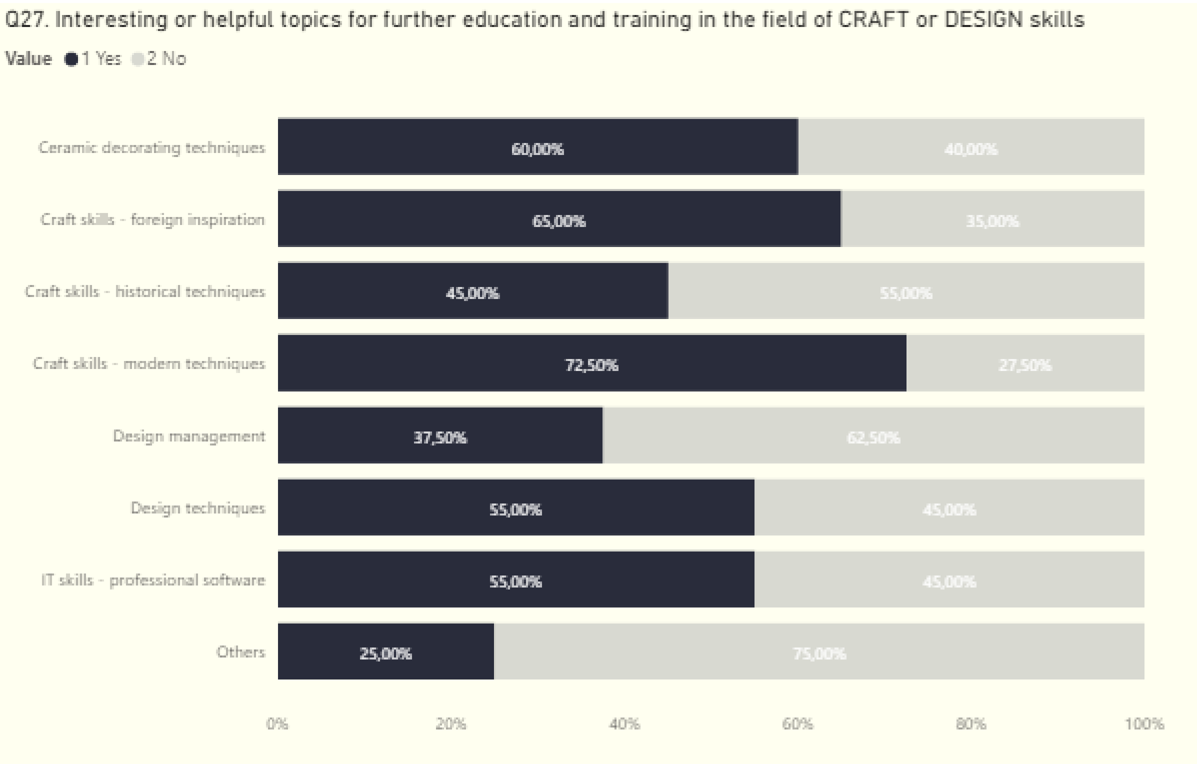


Figure 9 (Germany) Further education and training topics (management, marketing, and business skills)

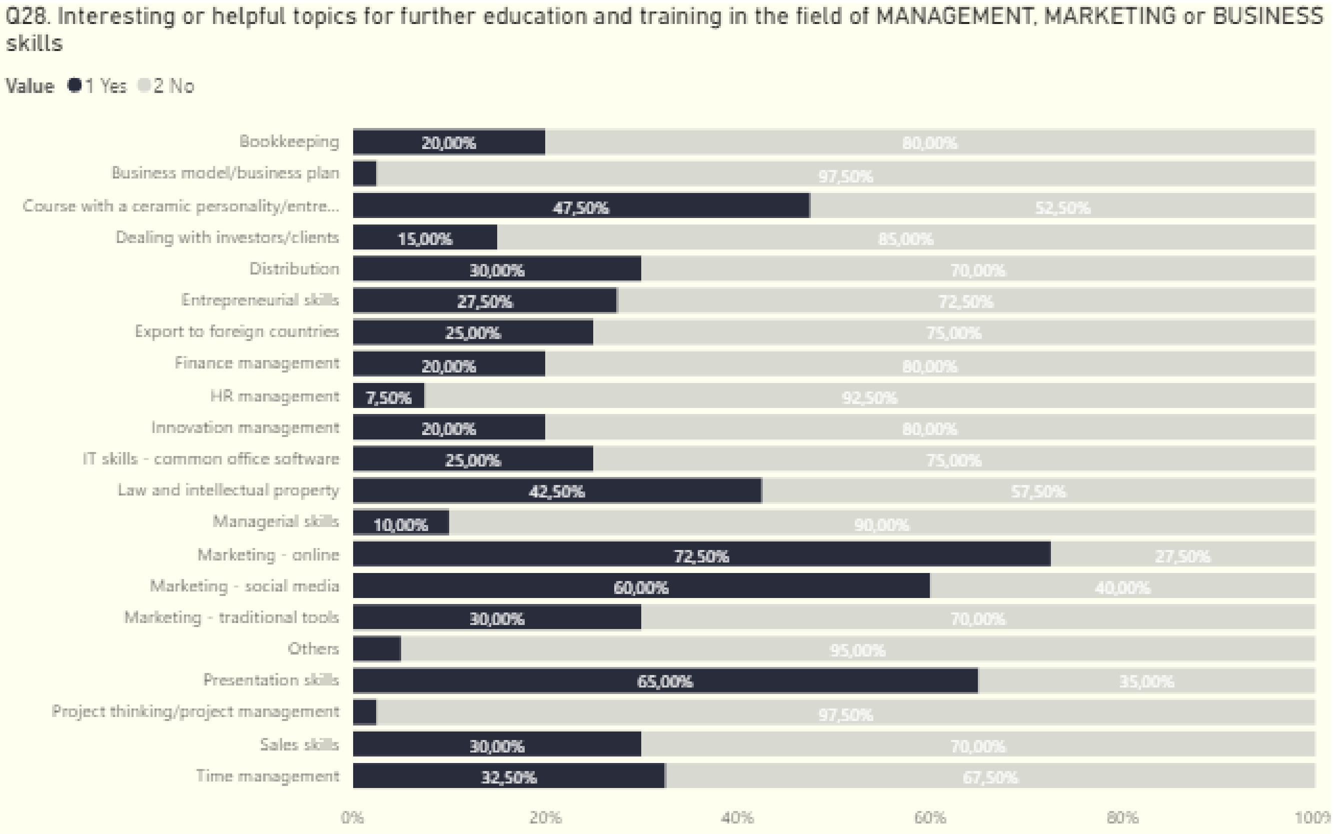


Figure 10 (Germany) Participating in marketing activities in the city/region/country

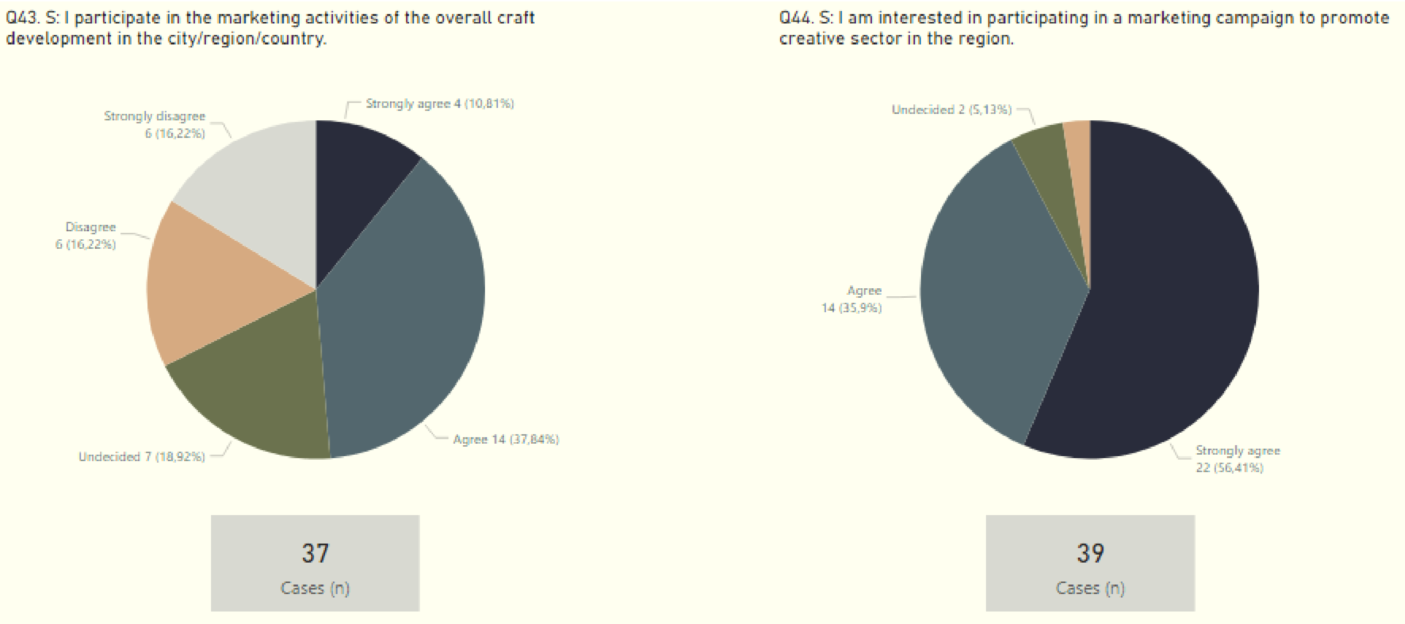


Figure 11 (Germany) A need of international portal about ceramics

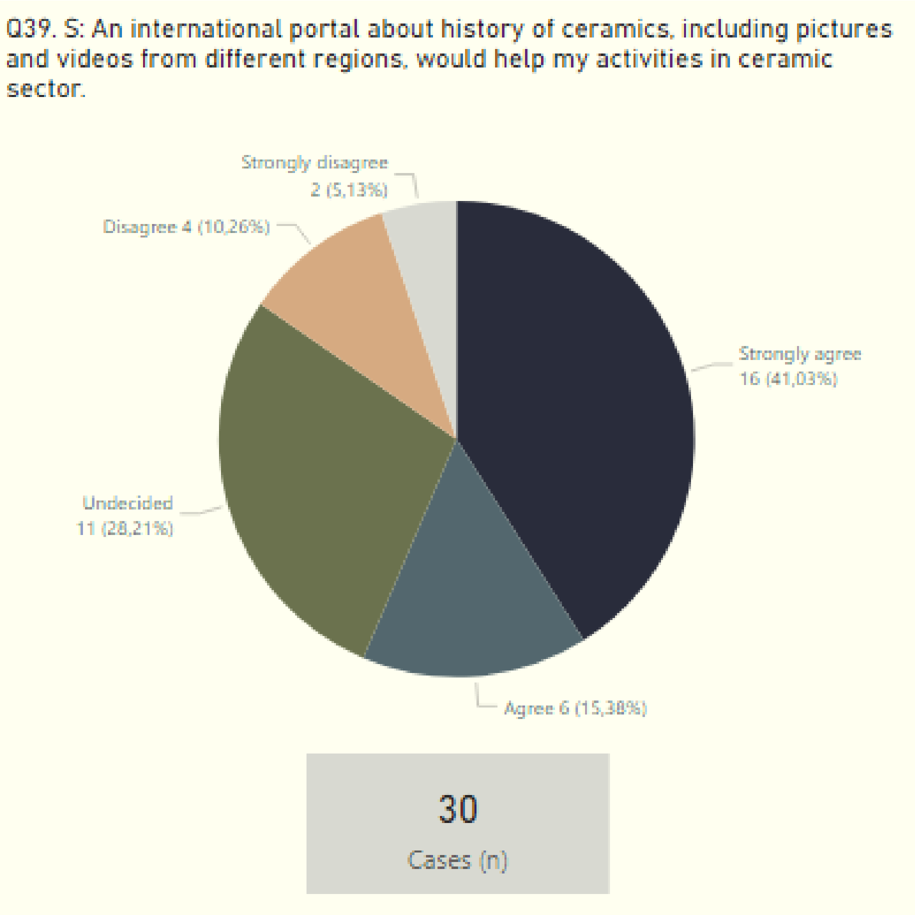
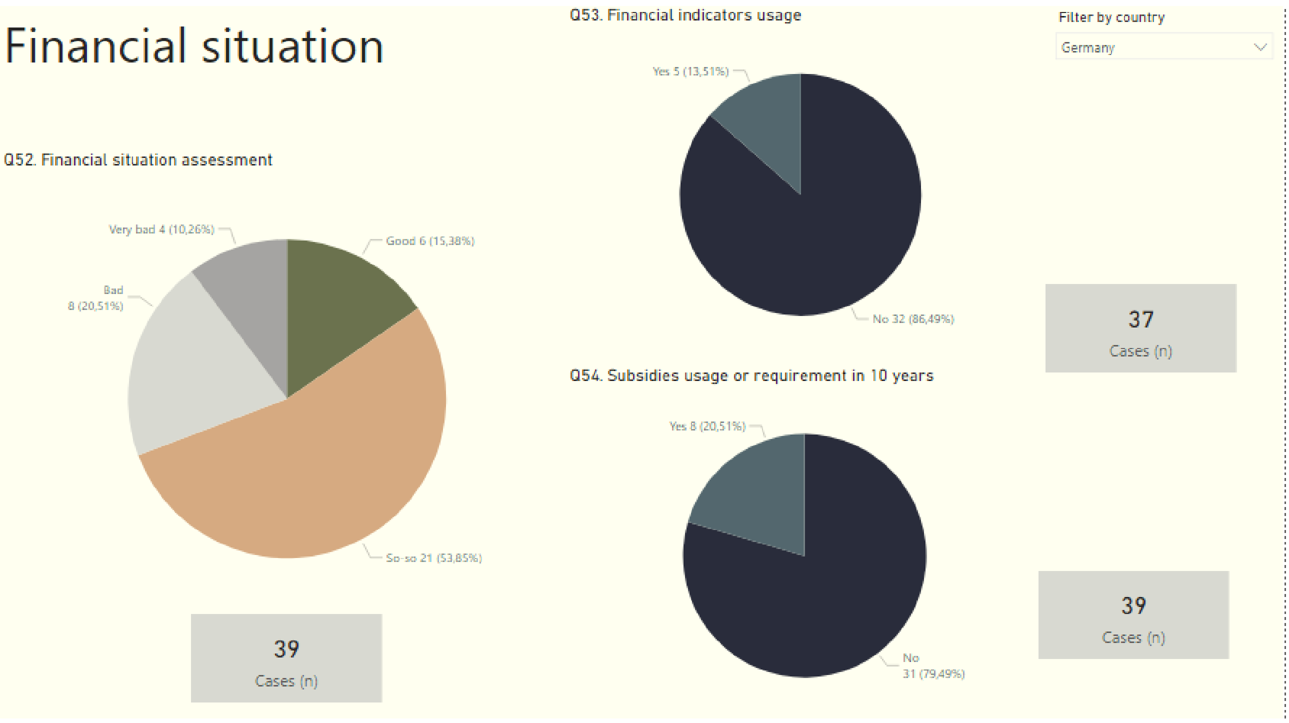


Figure 12 (Germany) Financial situation



6.3.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (Germany) Sample - students

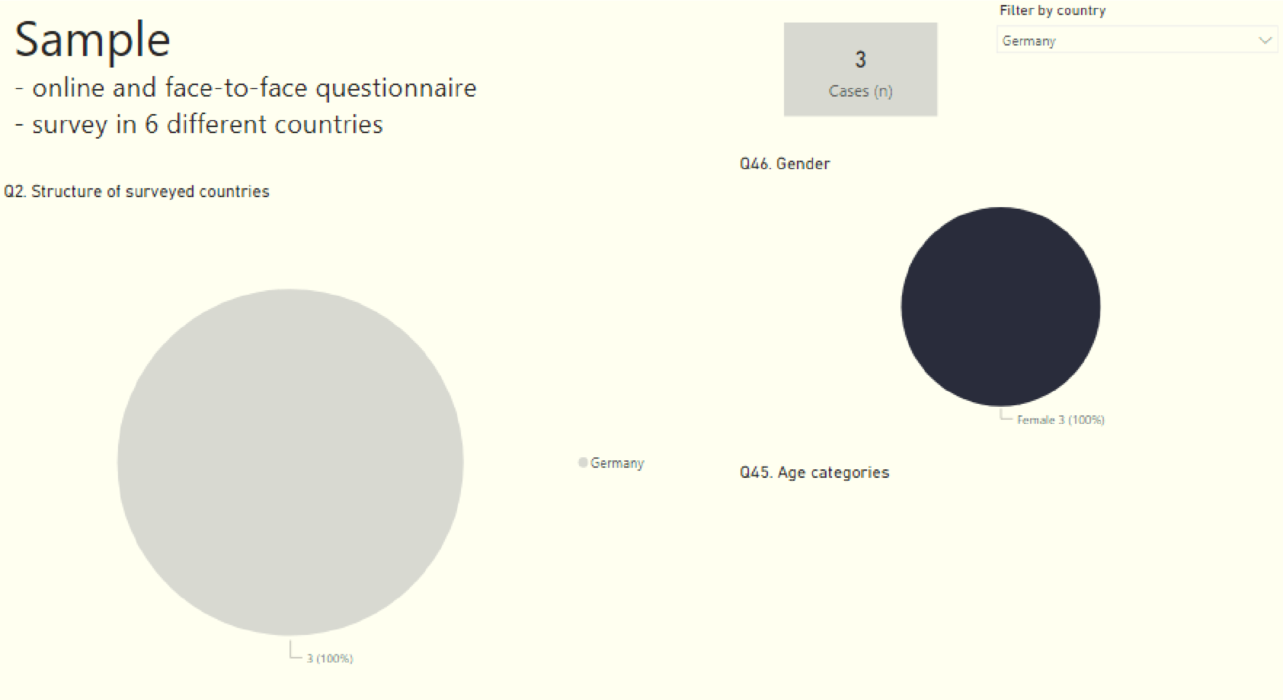


Figure 14 (Germany) Study direction of students

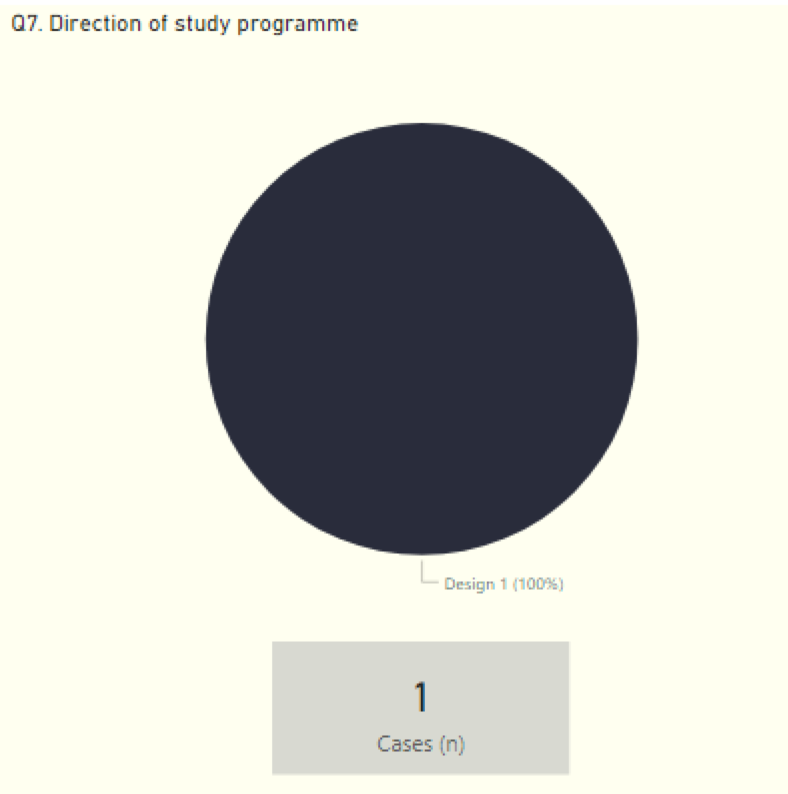


Figure 15 (Germany) Future direction of students

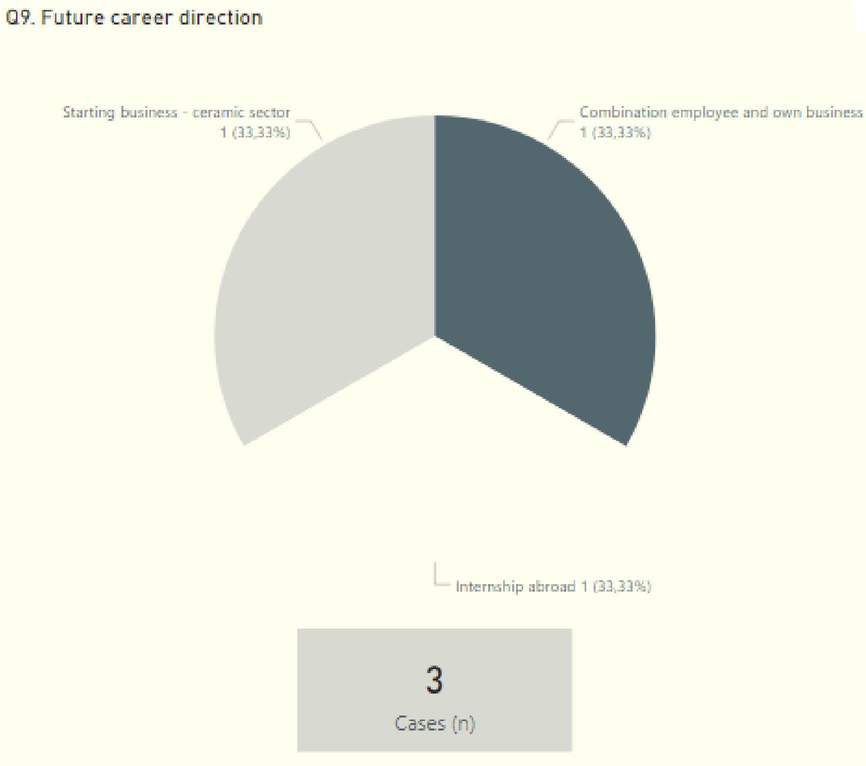


Figure 16 (Germany) Dream job

Figure 17 (Germany) Important students’ knowledge/skills gained

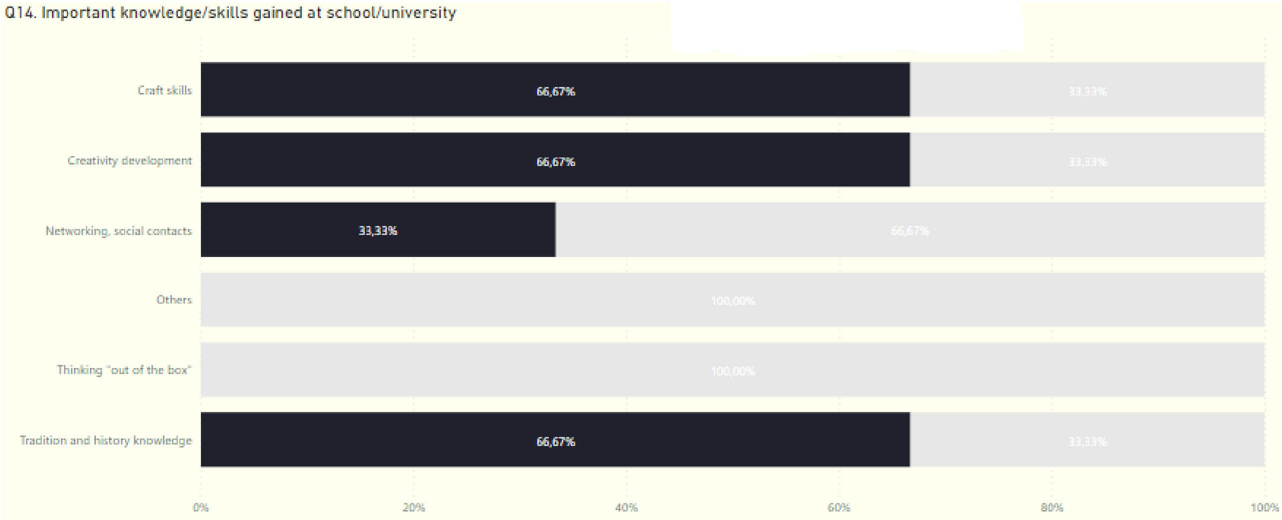


Figure 18 (Germany) Lack in students’ knowledge

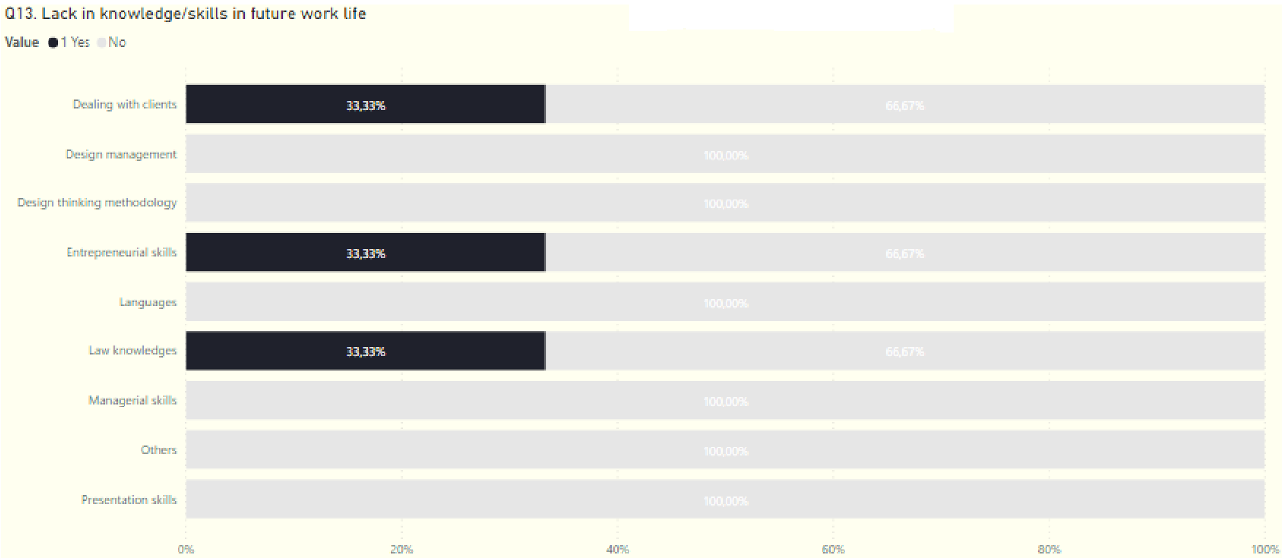


Figure 19 (Germany) Help with starting own business of finding a job

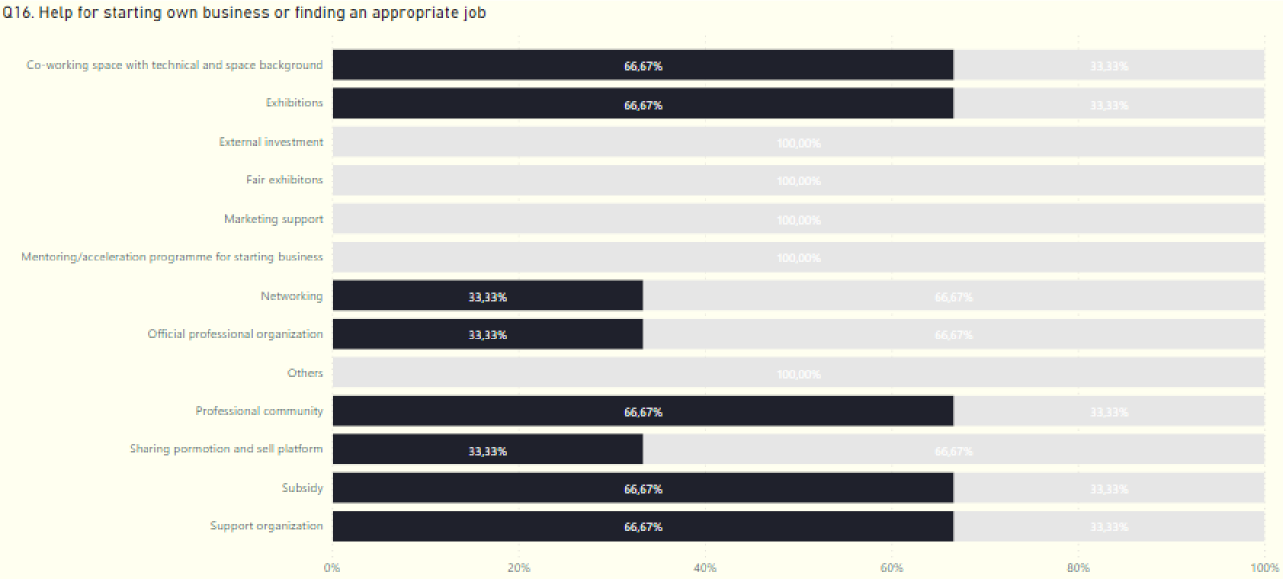
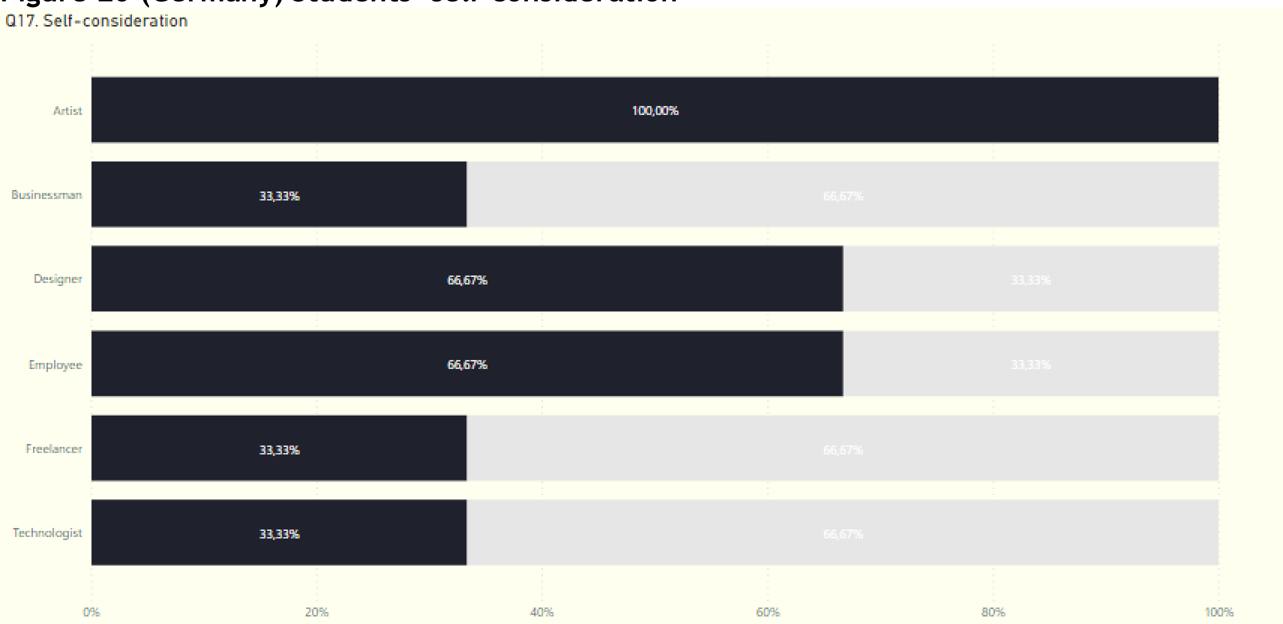


Figure 20 (Germany) Students' self-consideration



6.3.3. Expectations and needs of stakeholders

Figure 21 (Germany) Situation in ceramic sector

Figure 22 (Germany) Intensity of current cooperation

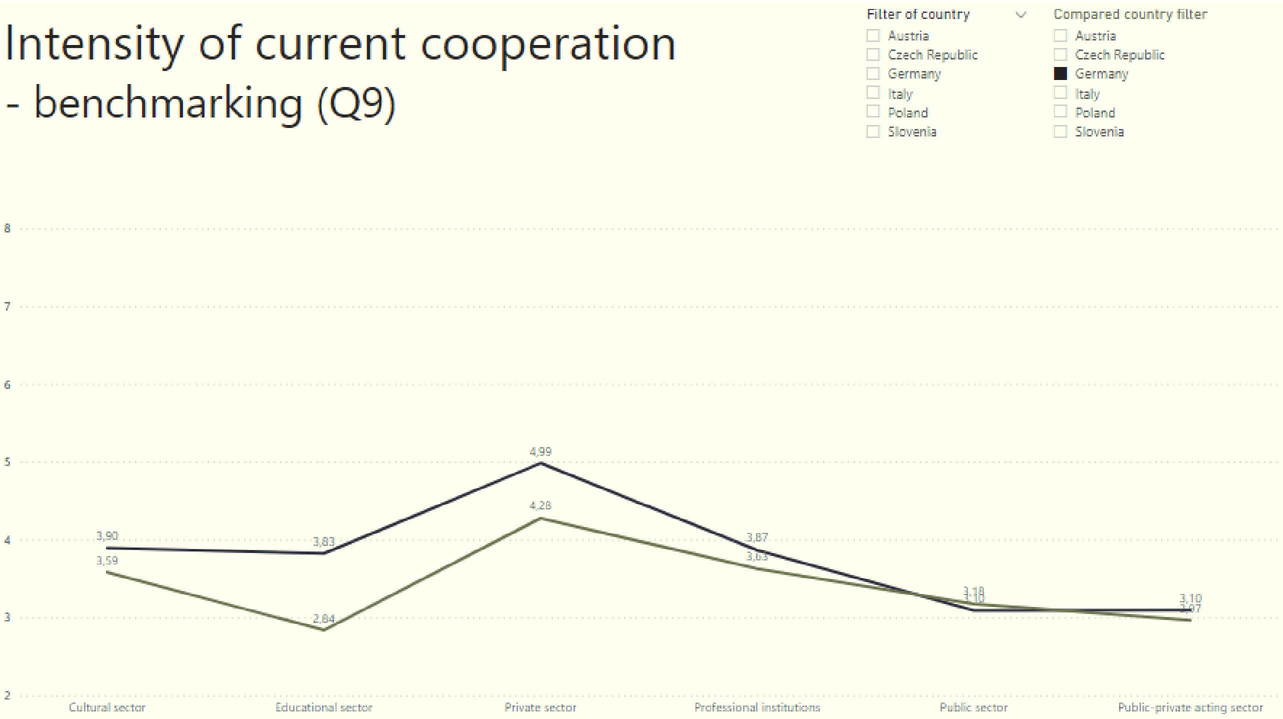


Figure 23 (Germany) Importance of cooperation

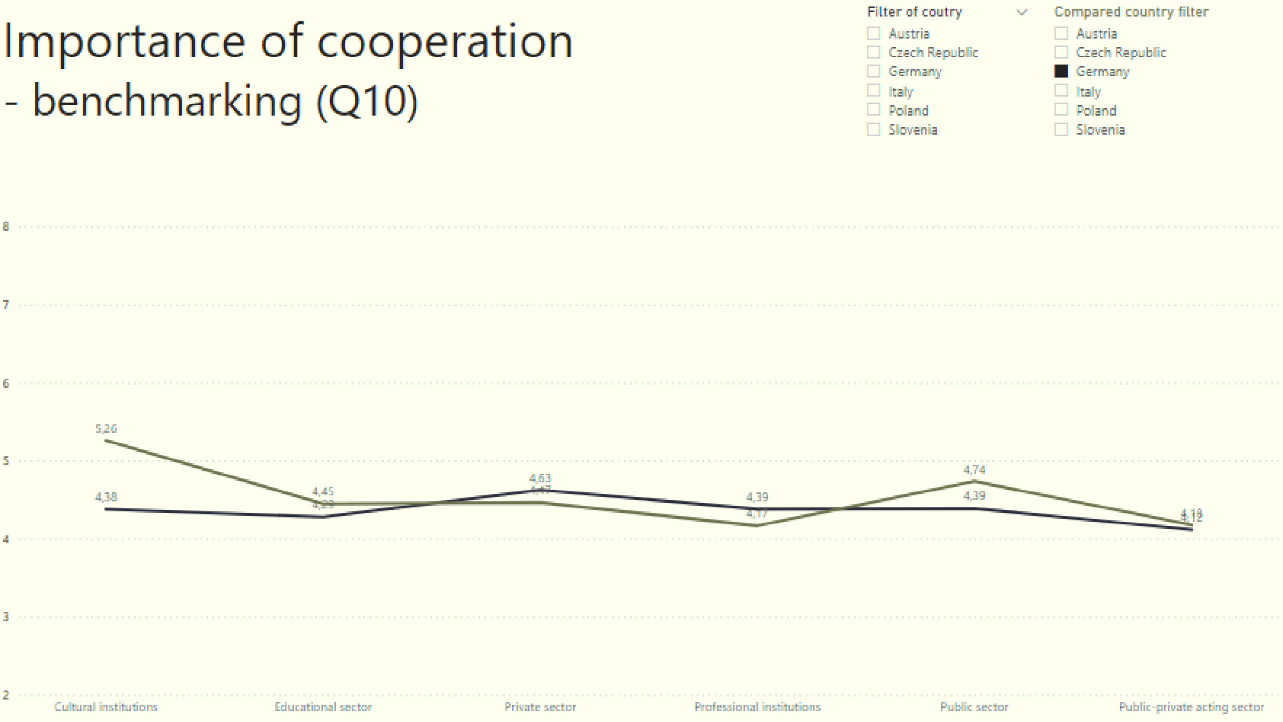


Figure 24 (Germany) Influence level

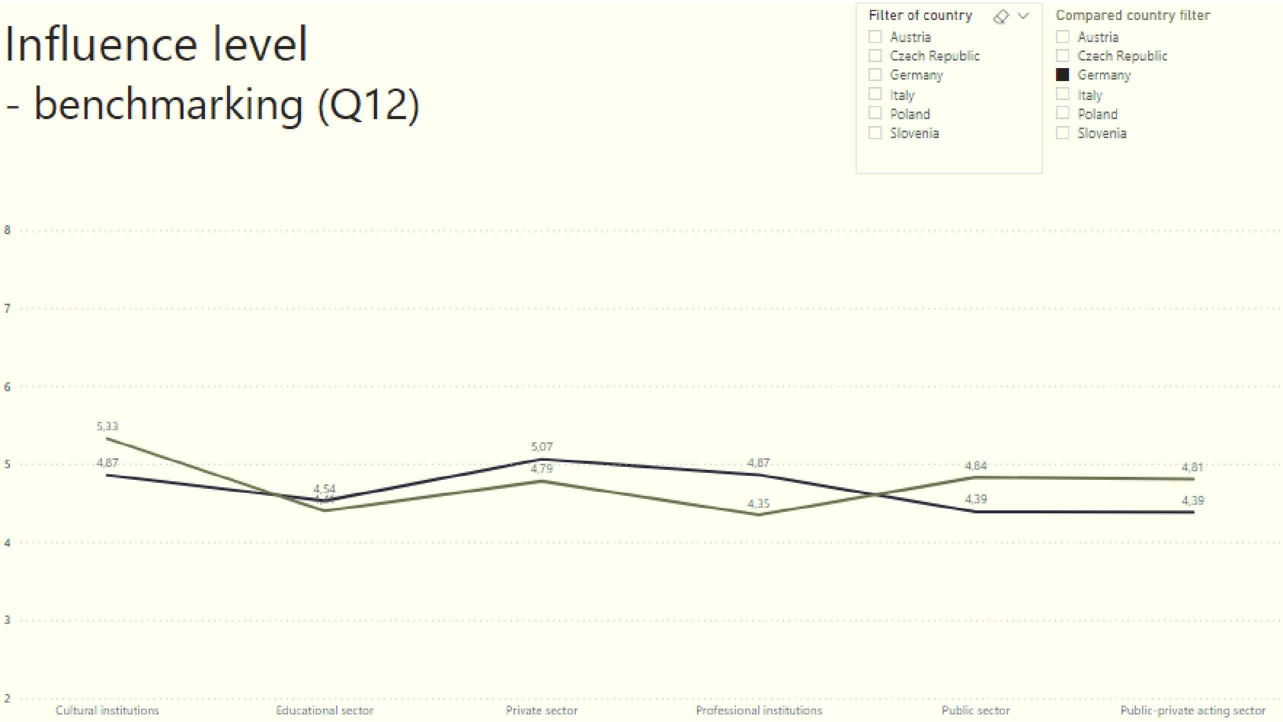


Figure 25 (Germany) Activities to support the sector

Activities to support the sector (Q13)

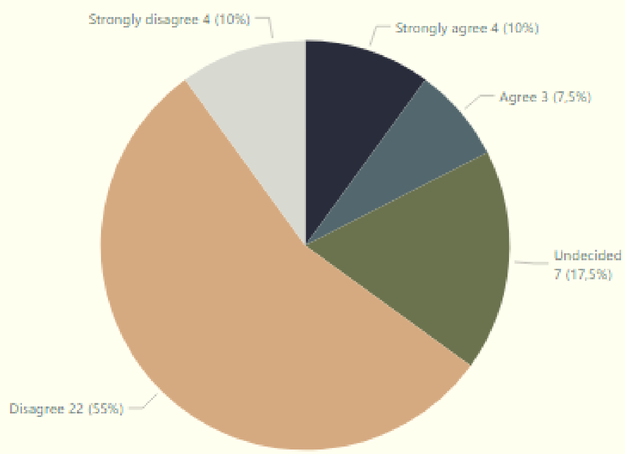
37
Cases (n)

Filter by country
Germany

Value	Cases
advertising programme to increase the appriciation of the artistic and handicraft, free of charge markets and exhibitions for artists, programmes for children and parents, programmes for children	1
Advertising, exhibitions	1
appriciation of masters of crafts, protection of the notation "ceramists" only for trained ceramists, reintroduction of the obligation to become a master craftsmens, fund the training in the same way as an university education	1
arts and crafts associations, museums, workshops/studios, universities open up for private ceramists to allow them to take part in lectures, networking	1
better opportunities for marketing, even for very small companies, sensible ways of procuring raw materials in smaller units, pooling and exchanging of skills and technology	1
broad based further education, exhibitions, markets	1
bundle websites, offer workshops to different techniques	1
ceramic centres in all federal states, professional working galleries and museums presenting contemporary ceramics, training centres for basic and further education, professional training as base for selfemployment/freelance	1
Contemporatry art and design should stay in forground, not tradtions from the past.	1
creationof networks beween ceramists, support (inexpensive) related to legal issues, public relatios, introduction of ceramists	1
Day of open potteries, HWK/guild information events, gallery evenings	1
Day of open potteries, markets, more media presence (written and online)	1
documentaion of exhibitions in films	1
education about crafts in general offered by more institutions, increase the appriciation of ceramics crafts in the public, more publications about the history of ceramics, more support for a national crafts council, which offers good paid jobs and not only works with volunteers	1
education, legal advise, industry, which offers their mechanics	1
exhibition opportunities, orders by the public sector (local, regional, federal authorities), fundig opportunities not only for young ceramists, facilitation of regulations, taxes, facilitation of self-employment out of unemployment, abolish bureaucracy	1
exhibitions, website	1
Fence in China and let nothing more out	1
further training offers in the fields of technologies and advertising, networking, also cross-industry	1
high-quality ceramic markets, workshops, exhibitions	1
Celkem	**37**

Figure 26 (Germany) Level of cooperation

Q11. S: The level of cooperation in your region (country) in the ceramic sector is sufficient.



40
Cases (n)

Figure 27 (Germany) Support or cooperation

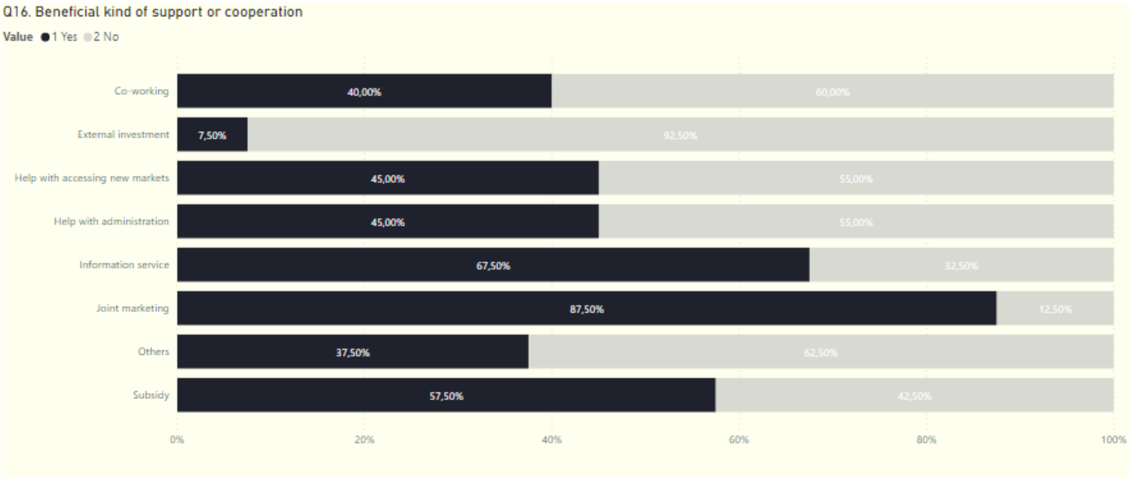


Figure 28 (Germany) Attitude towards a statement

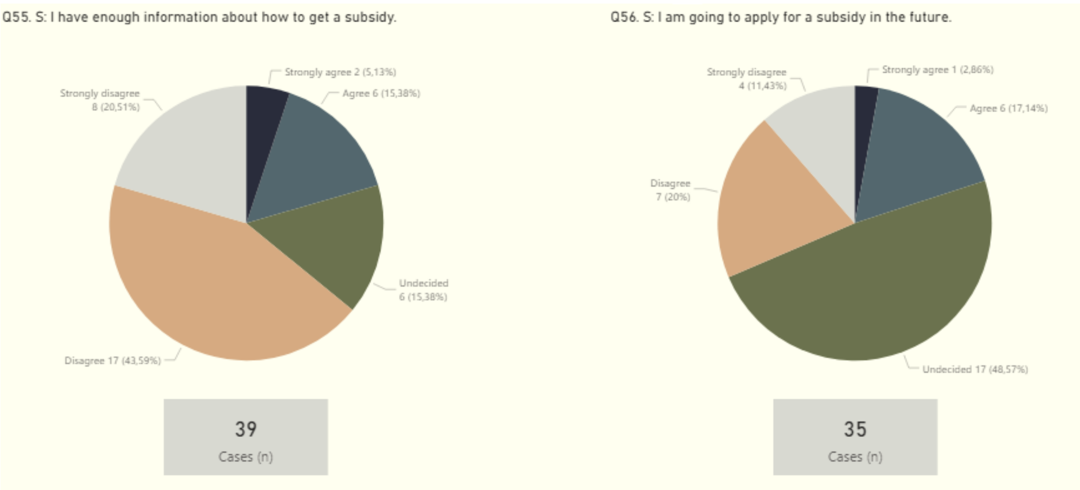
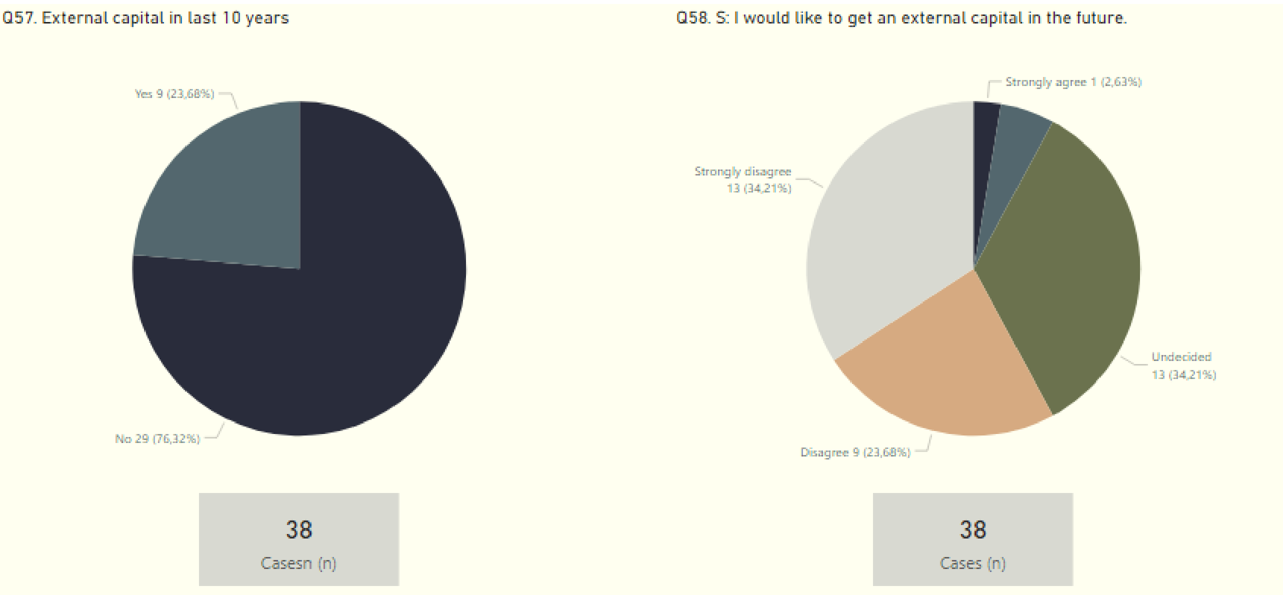


Figure 29 (Germany) Financial situation, attitude towards a statement



6.3.4. Marketing activities

Figure 30 (Germany) Currently used marketing activities

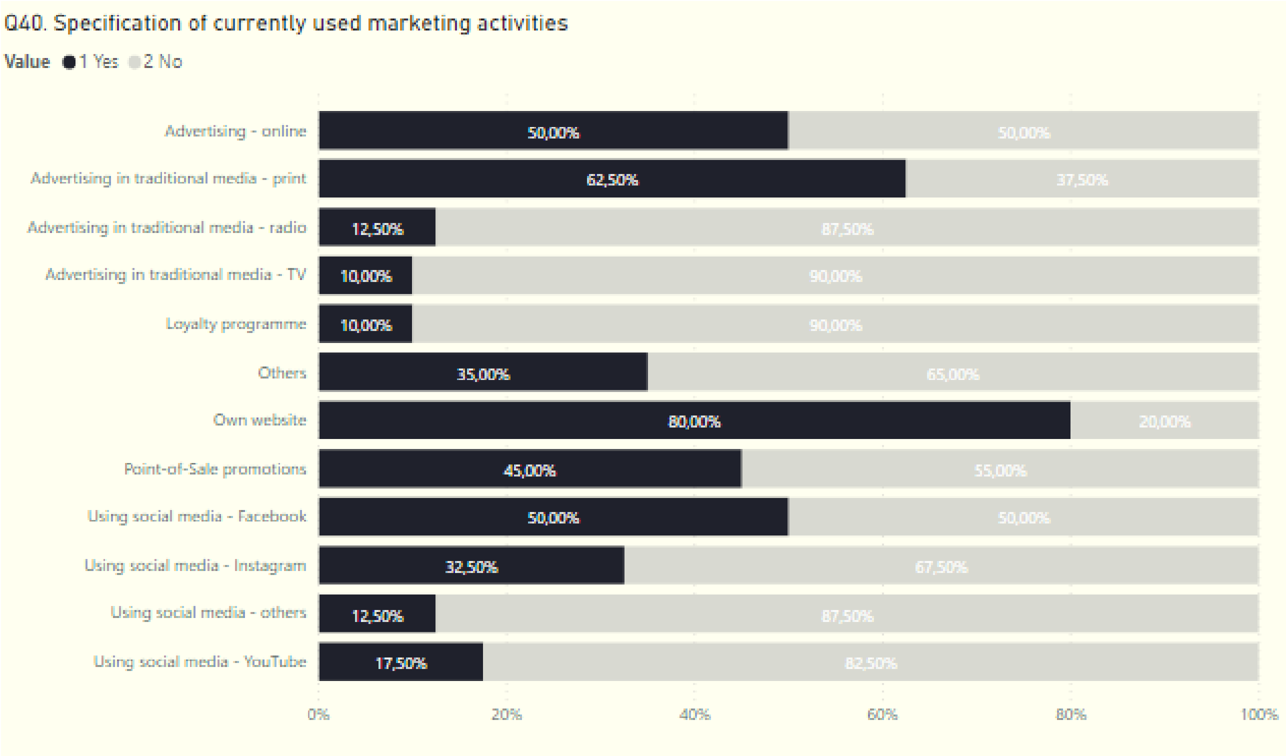


Figure 31 (Germany) Marketing activities planned for the future

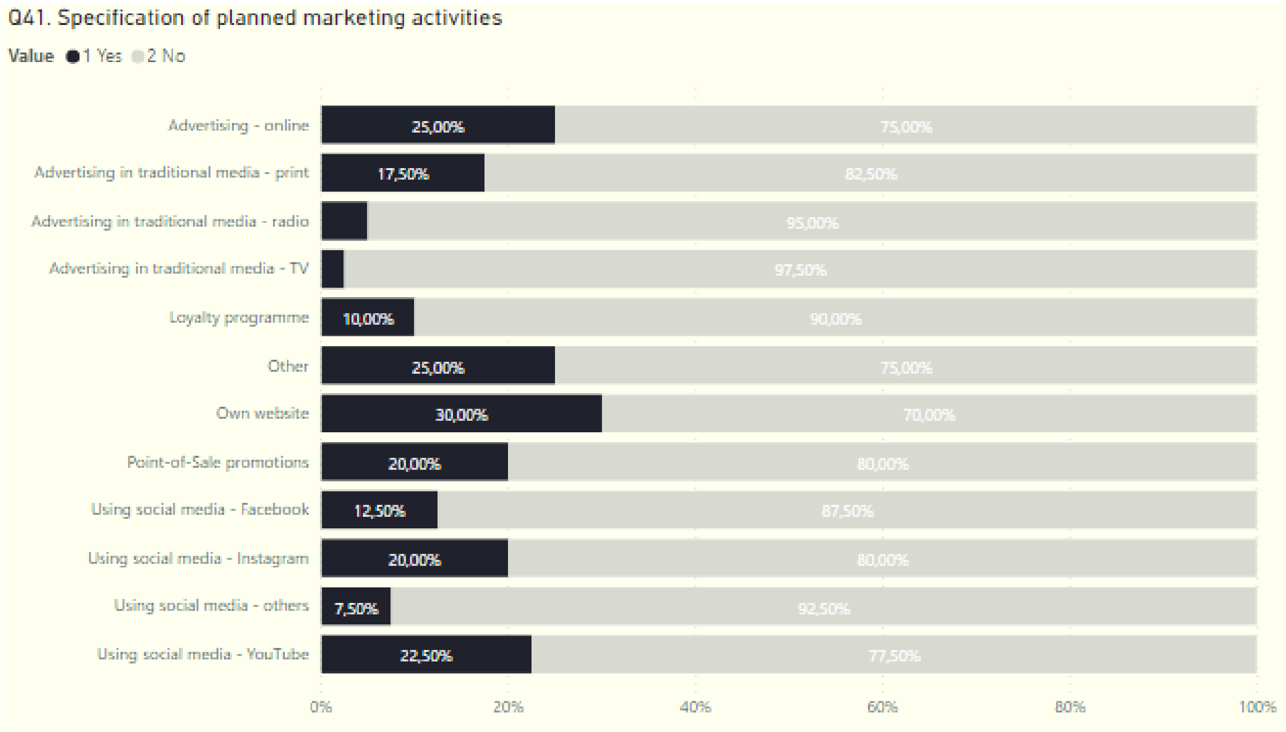


Figure 32 (Germany) Responsibility for marketing activities

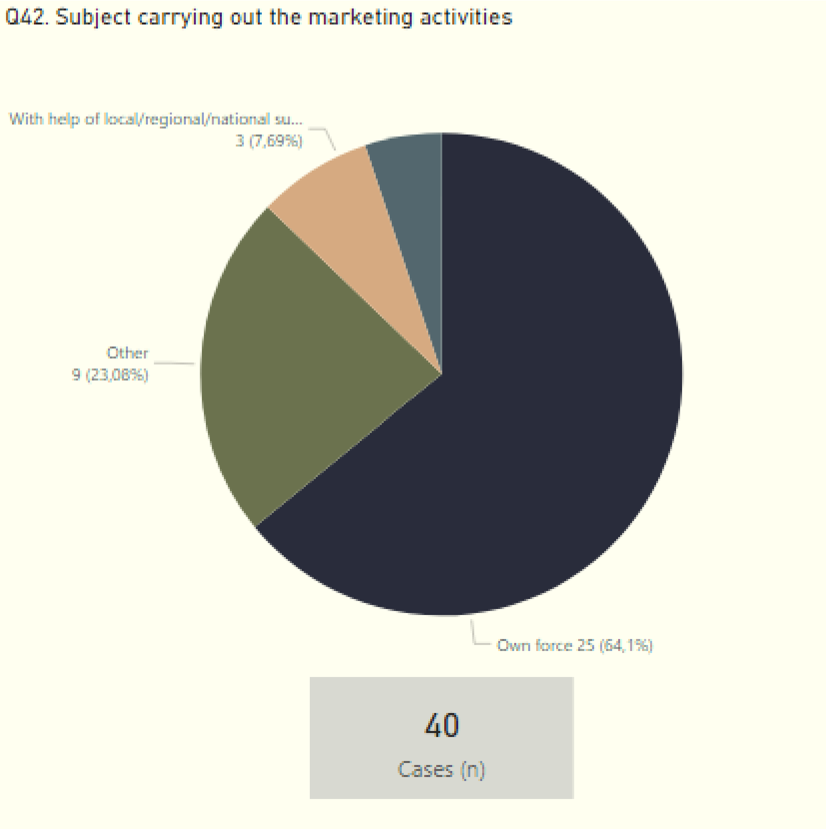
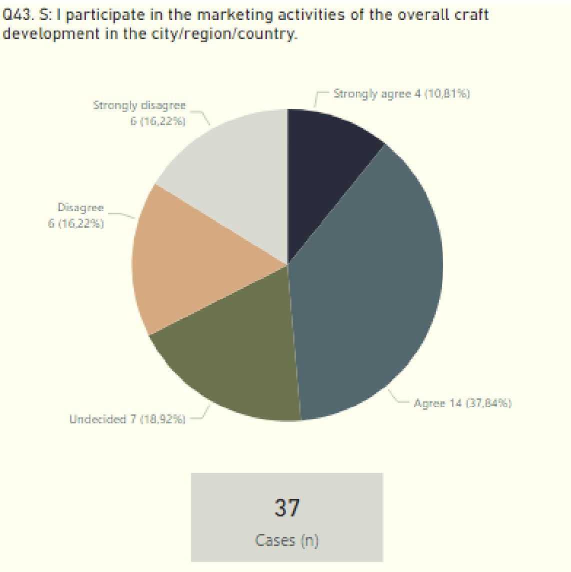


Figure 33 (Germany) Participating in the marketing activities



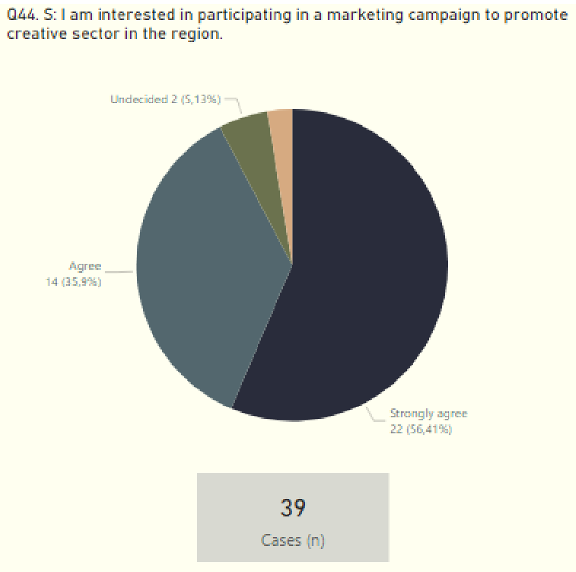


Figure 34 (Germany) Marketing activities on social networks

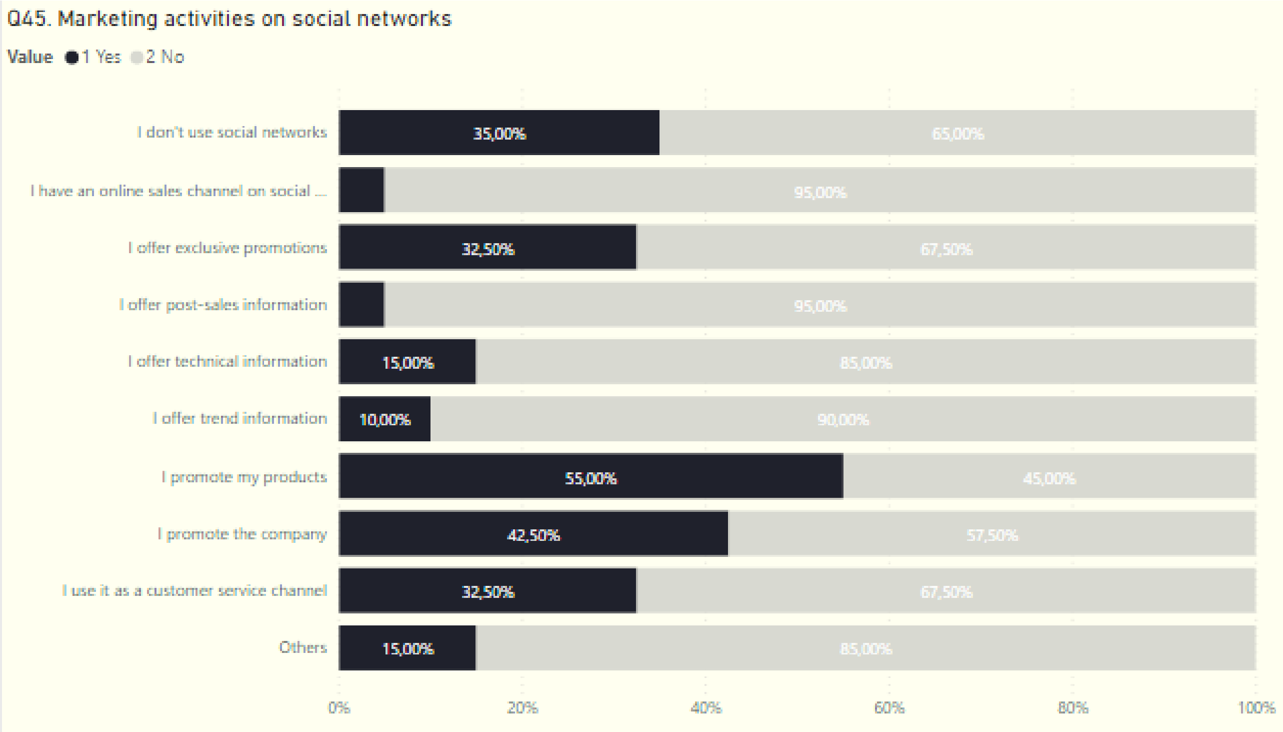


Figure 35 (Germany) Feedback on social media

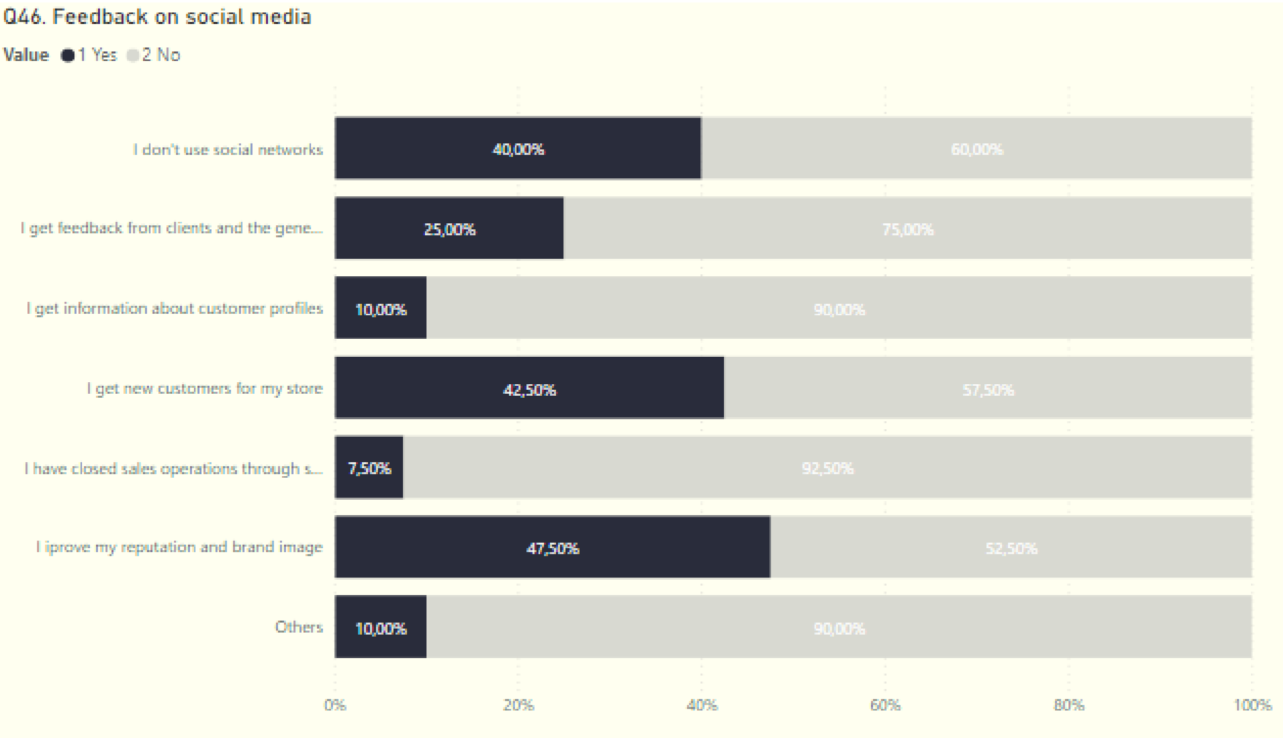


Figure 36 (Germany) Currently used distribution channels

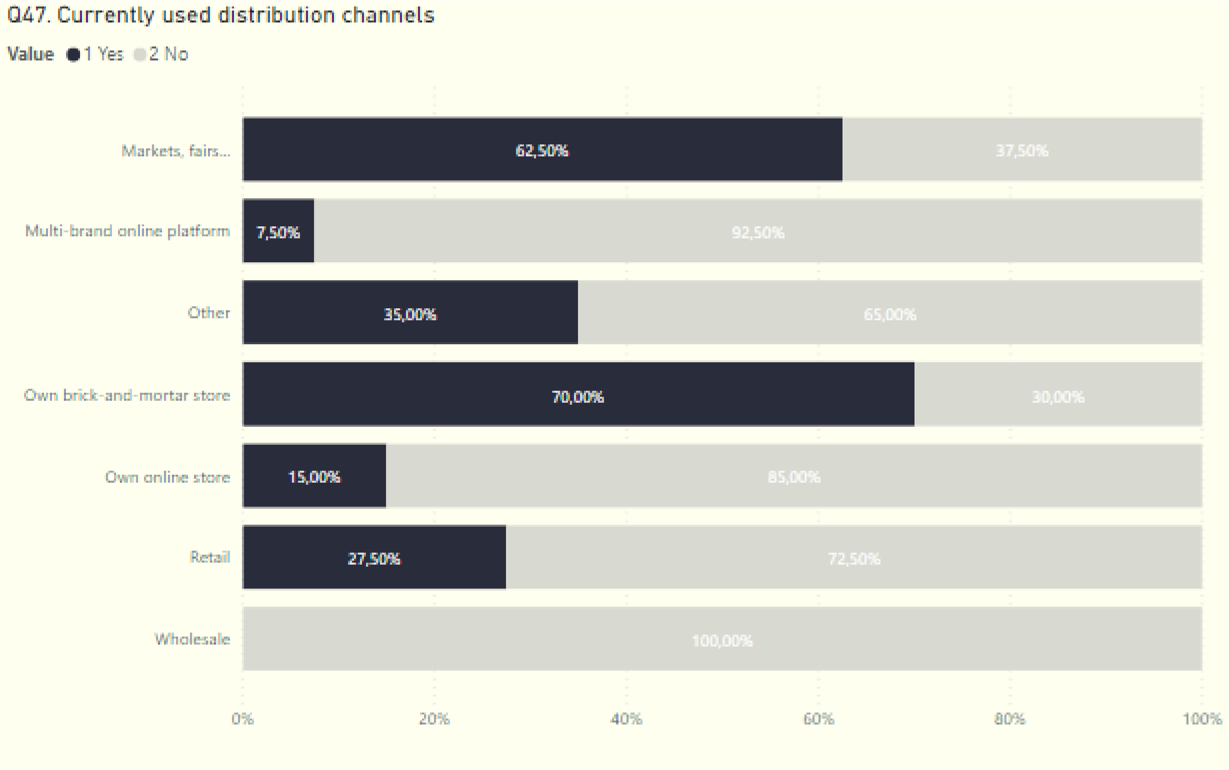
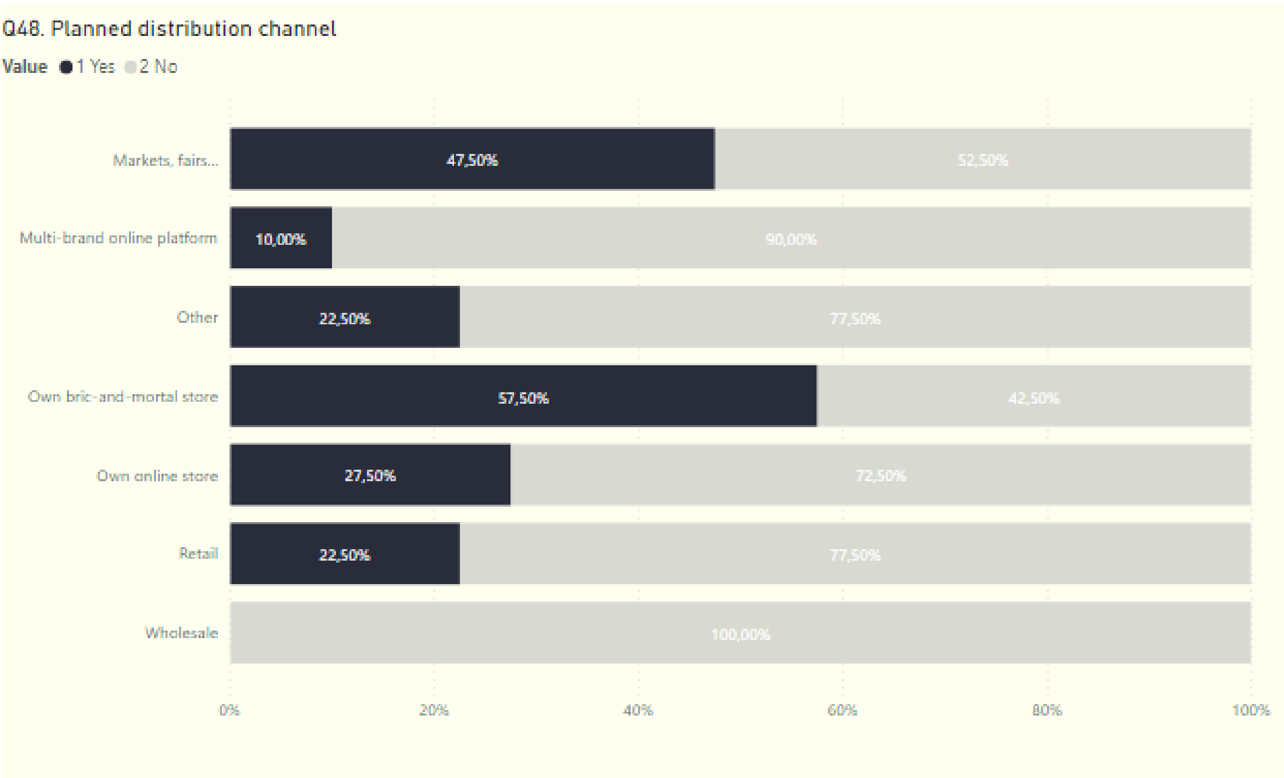


Figure 37 (Germany) Planned distribution channels



6.4. Annexes Italy

6.4.1. Businesses as existing entrepreneurial capacities – graphical overview

Figure 1 (Italy) Sample - Legal form of respondents

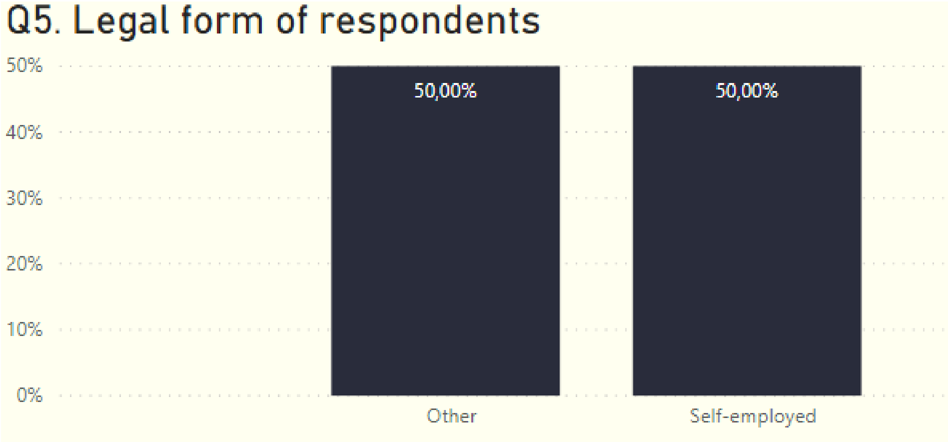


Figure 2 (Italy) Sample - Length of managing business

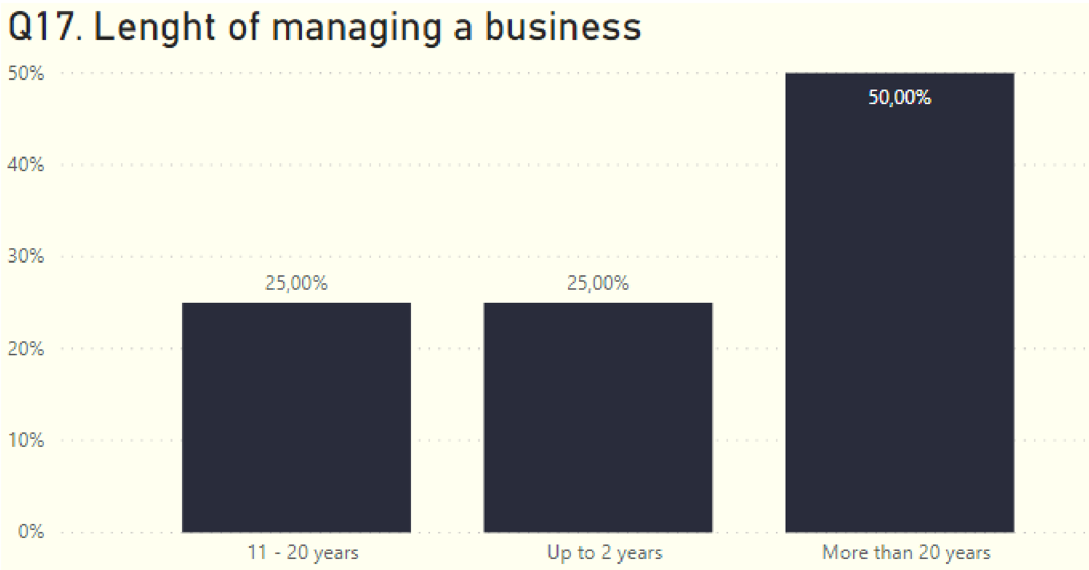


Figure 3 (Italy) Situation in ceramic sector

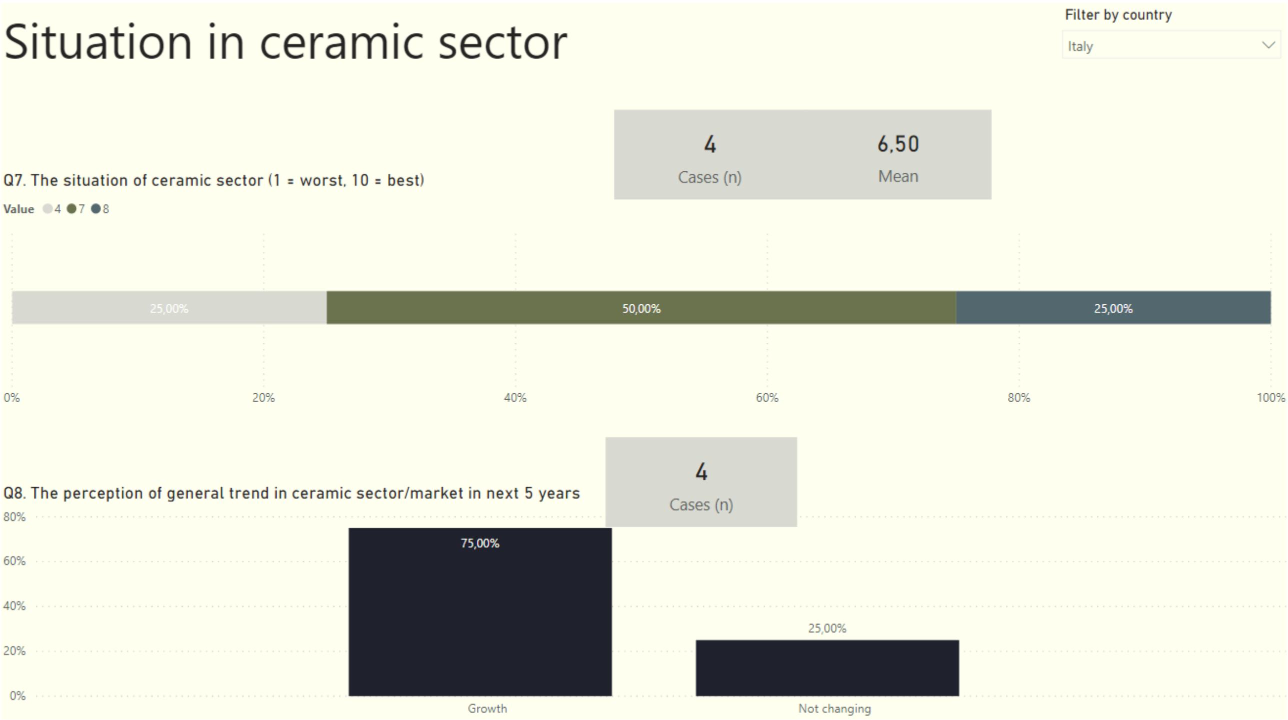


Figure 4 (Italy) Level of cooperation

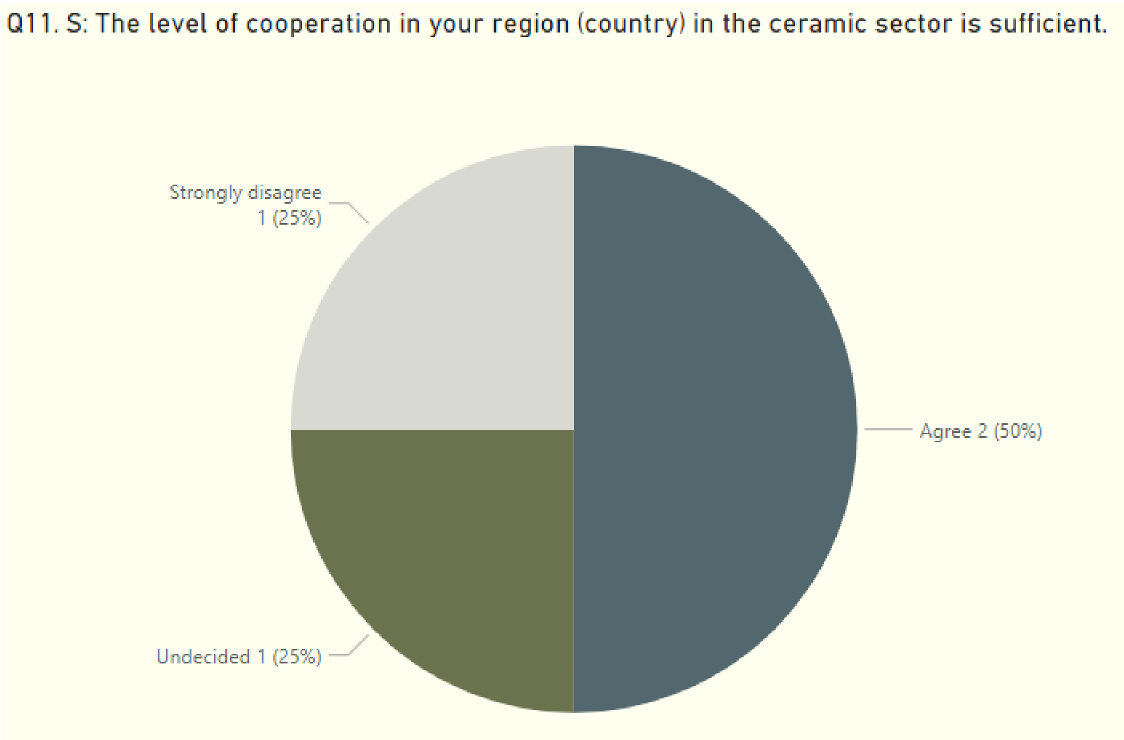


Figure 5 (Italy) Membership in an association

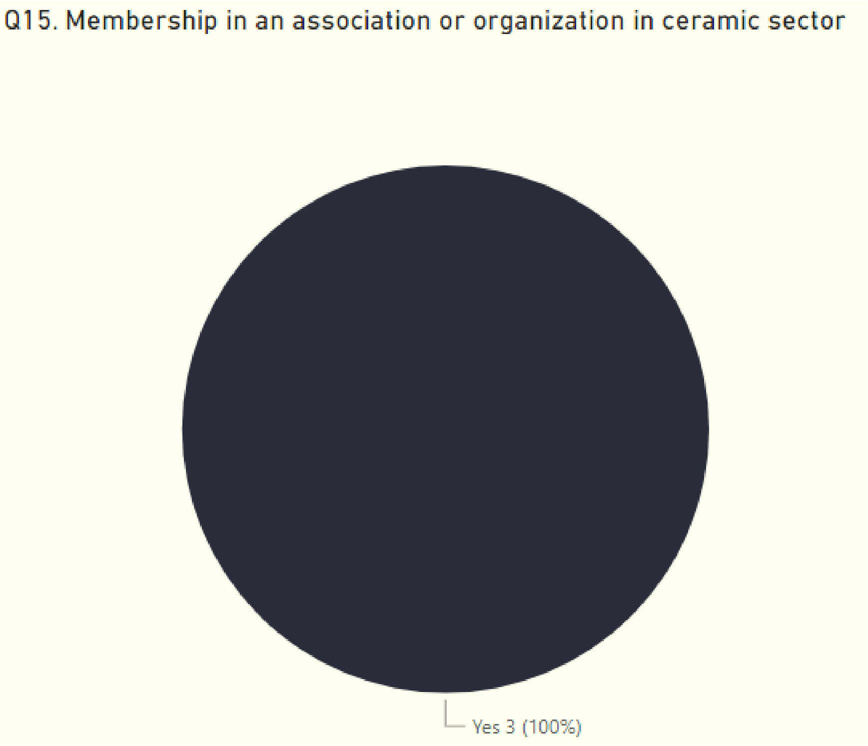


Figure 6 (Italy) Membership in an association

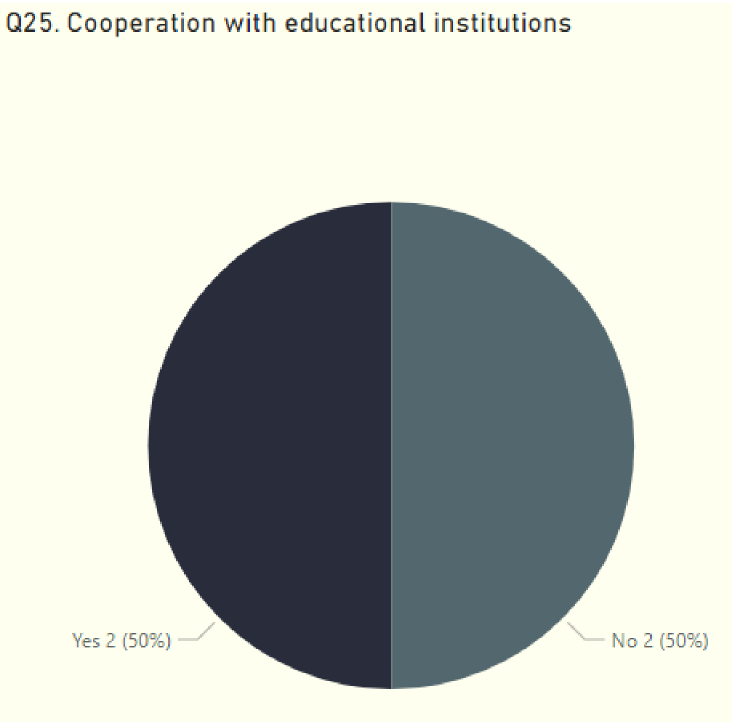


Figure 7 (Italy) Employee and self-training

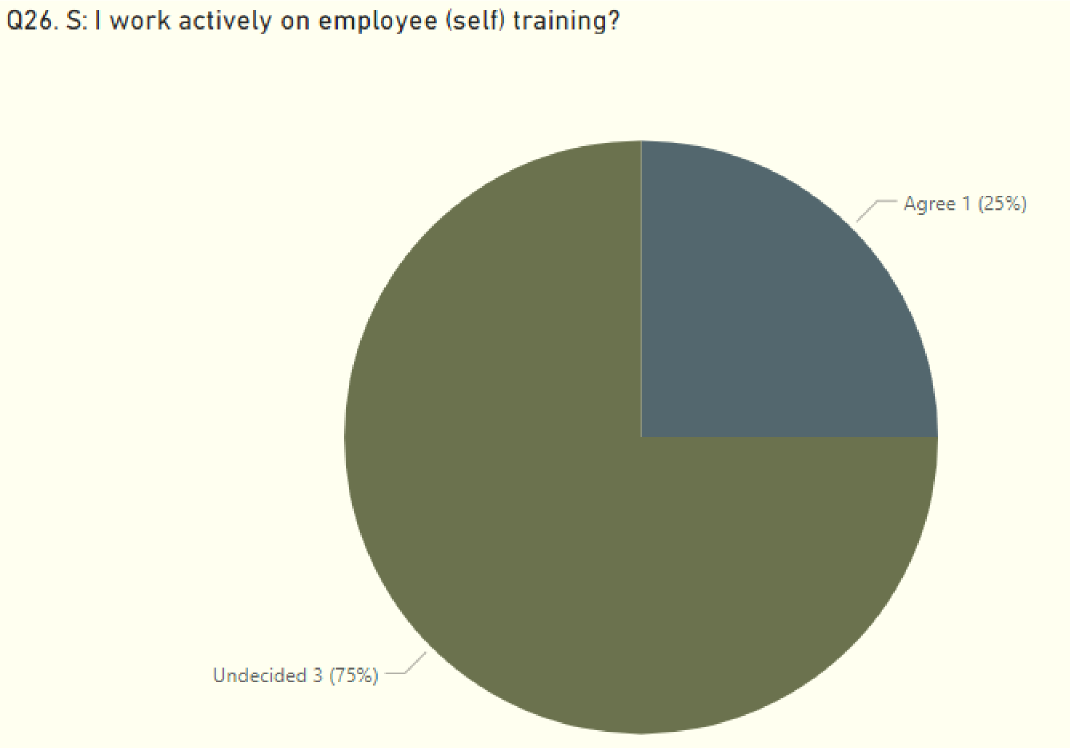


Figure 8 (Italy) Further education and training topics (craft and design skills)

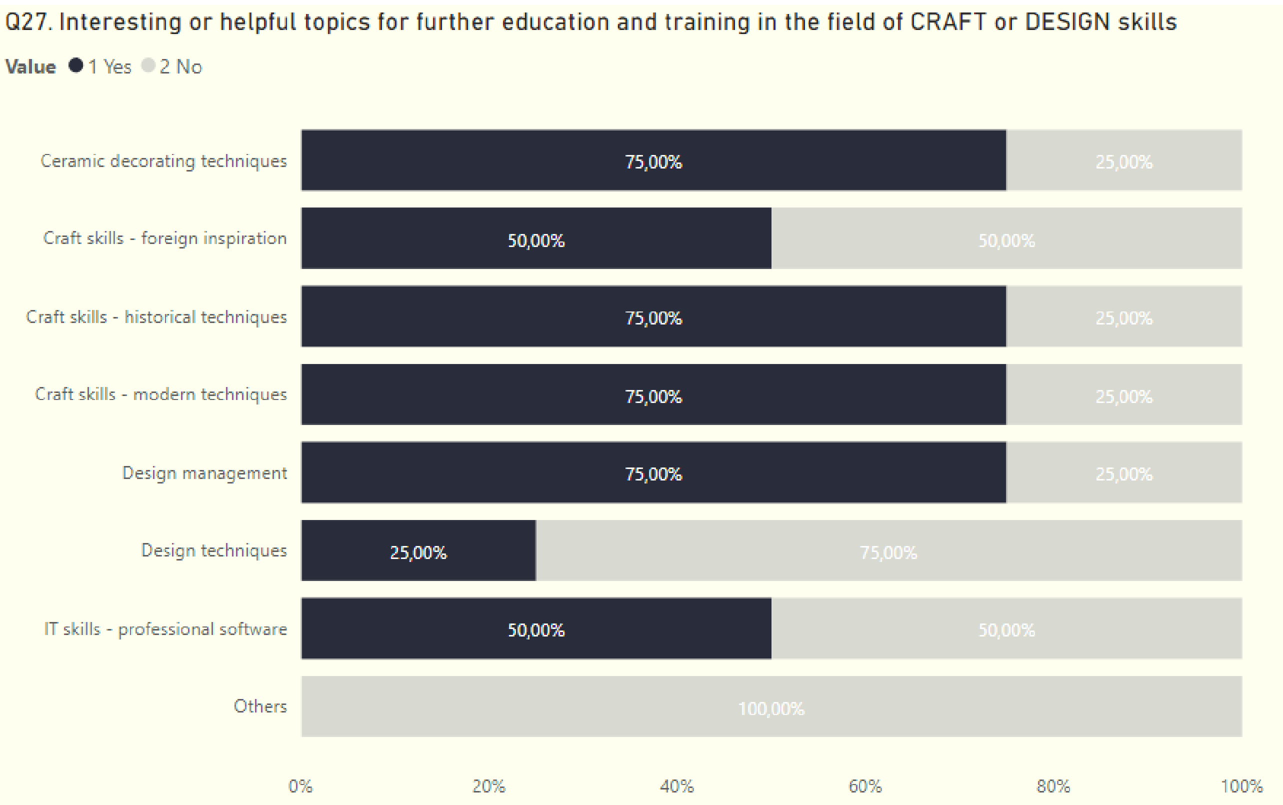


Figure 9 (Italy) Further education and training topics (management, marketing, and business skills)

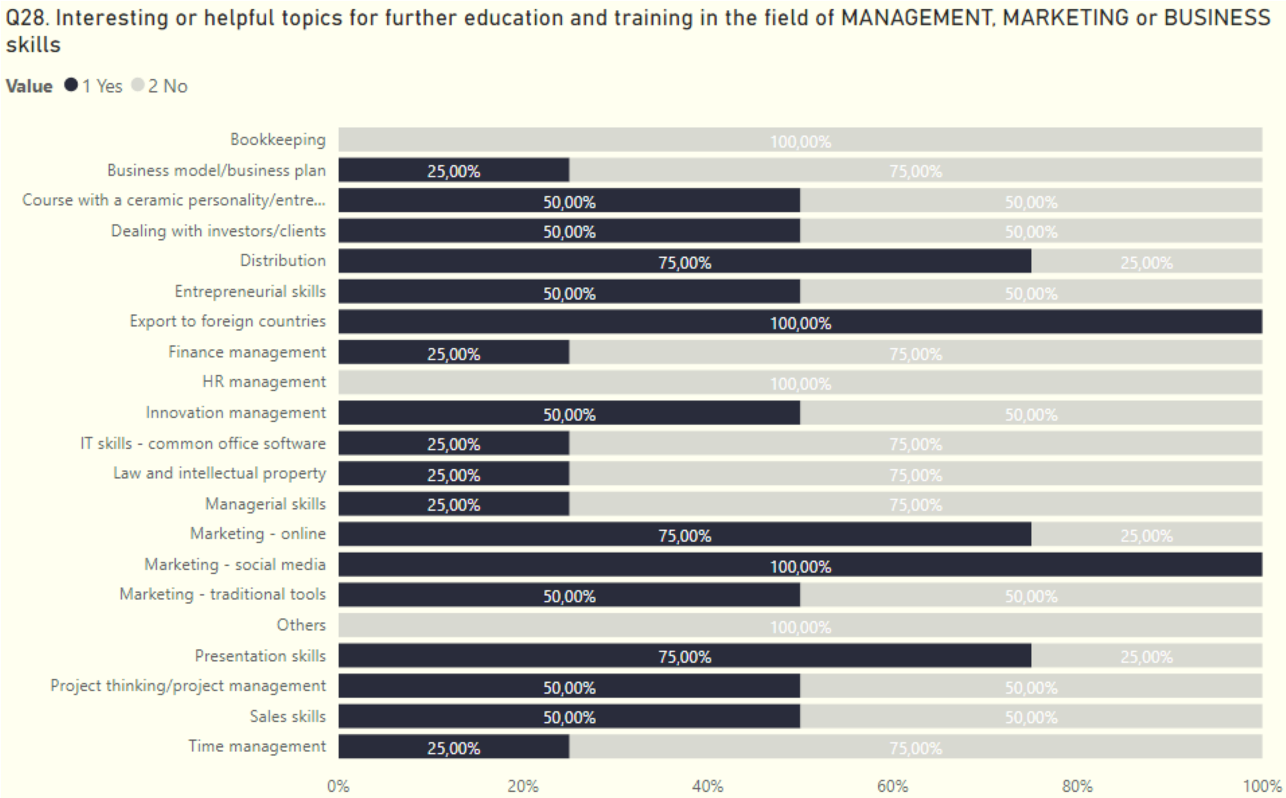


Figure 10 (Italy) Participating in marketing activities in the city/region/country

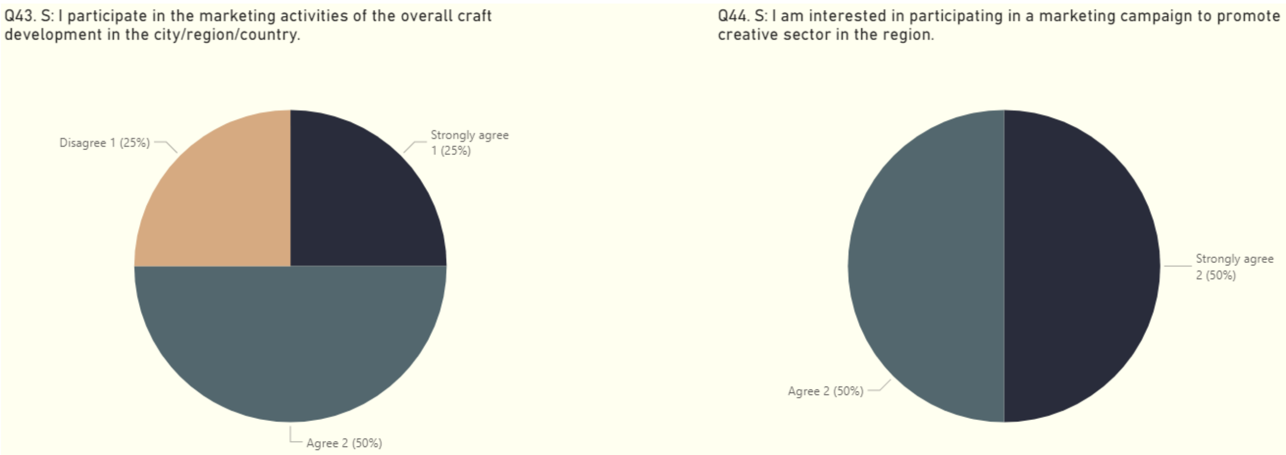


Figure 11 (Italy) A need of international portal about ceramics

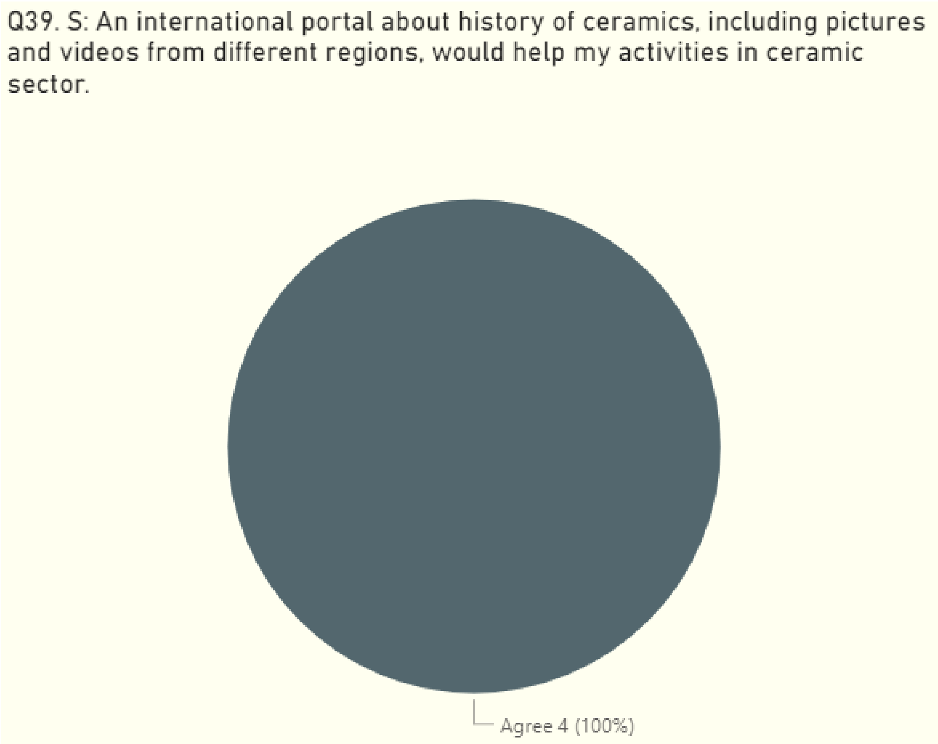
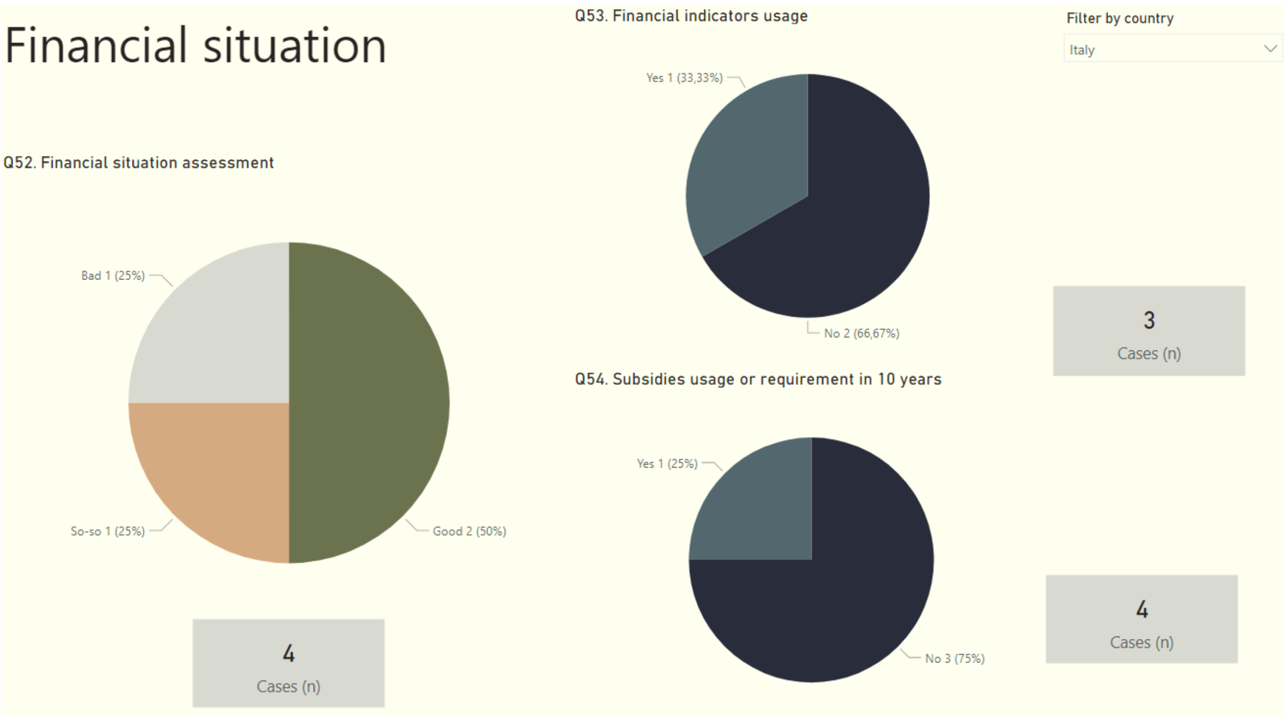


Figure 12 (Italy) Financial situation



6.4.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (Italy) Sample - students

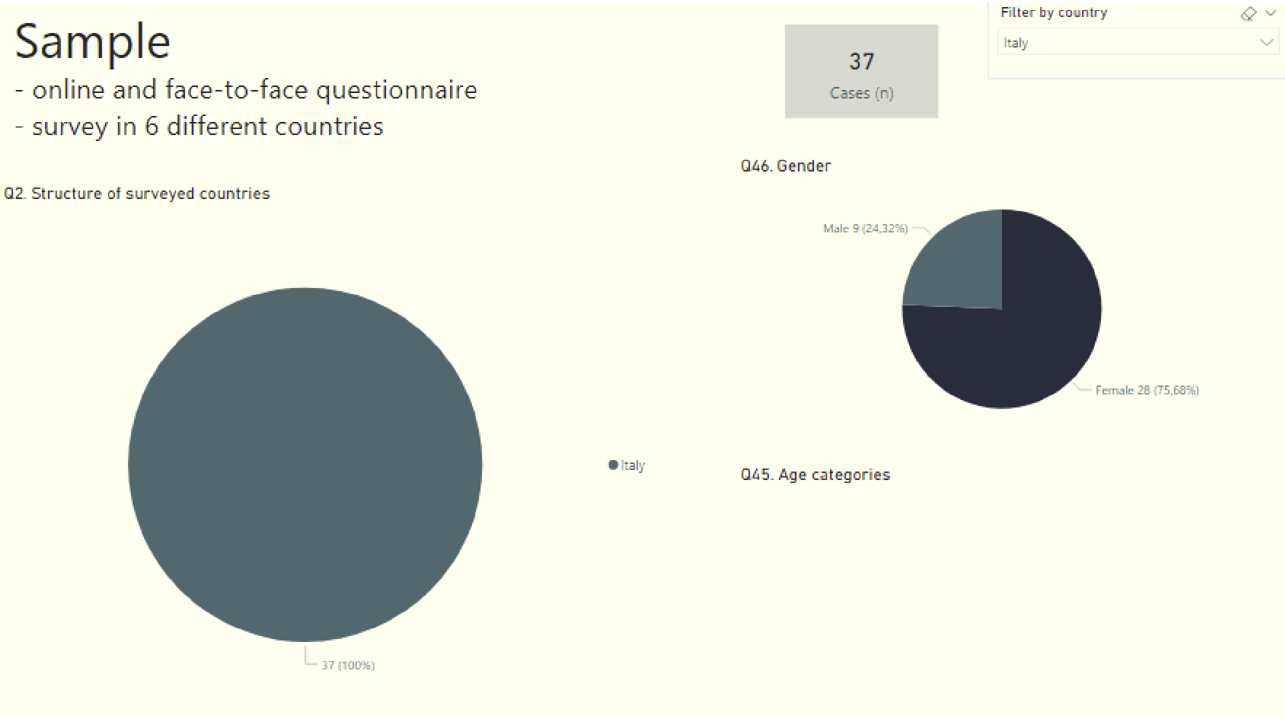


Figure 14 (Italy) Study direction of students

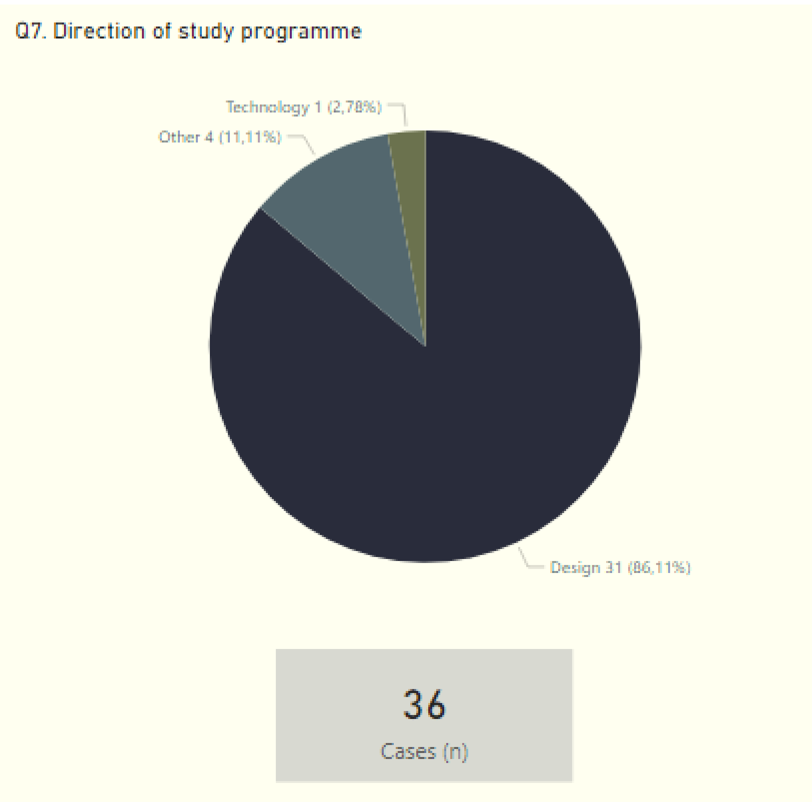


Figure 15 (Italy) Future direction of students

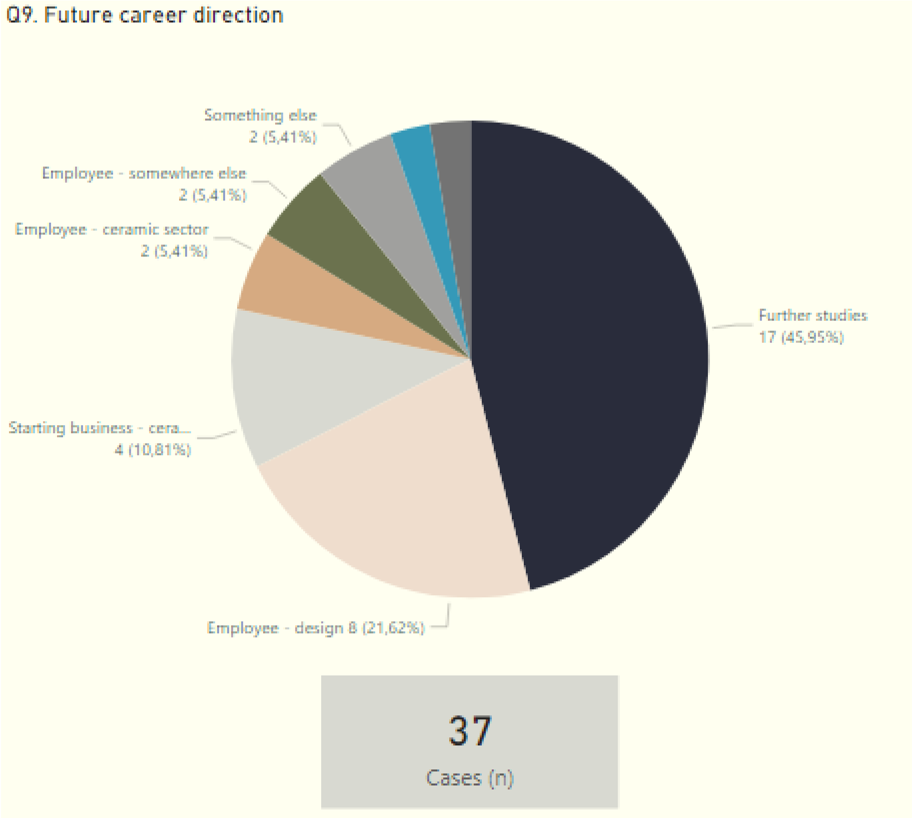


Figure 16 (Italy) Dream job

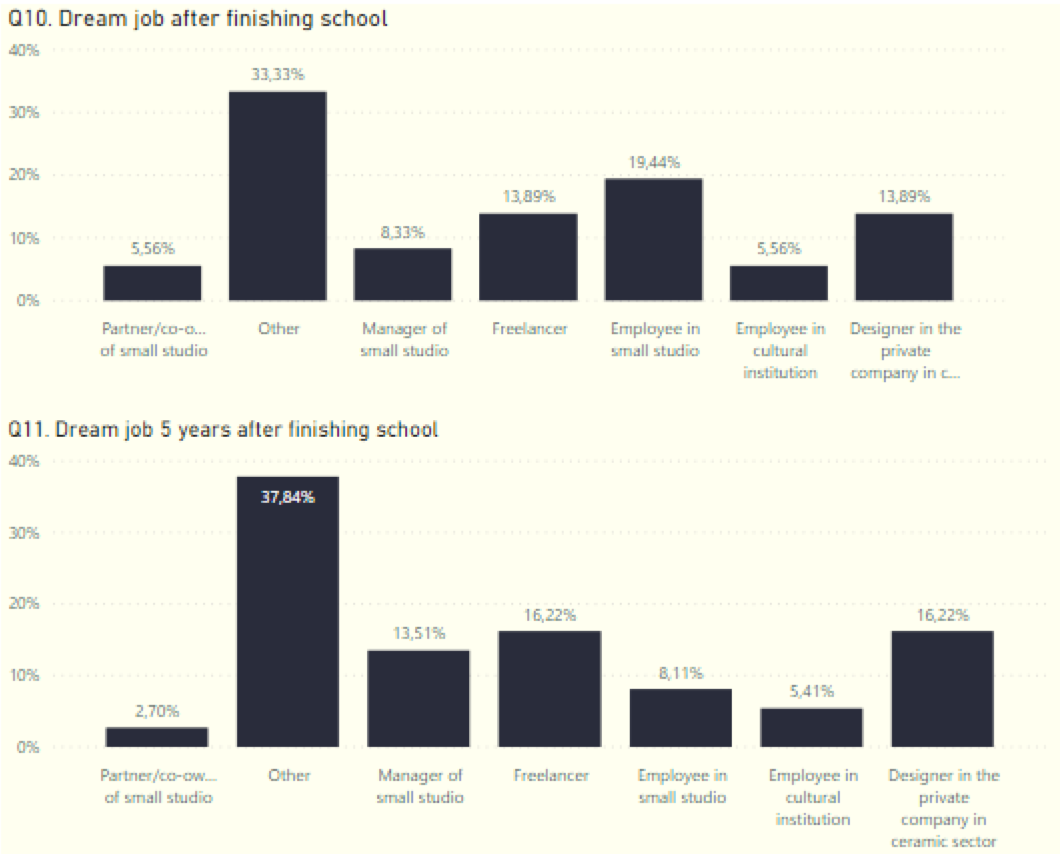


Figure 17 (Italy) Important students' knowledge/skills gained

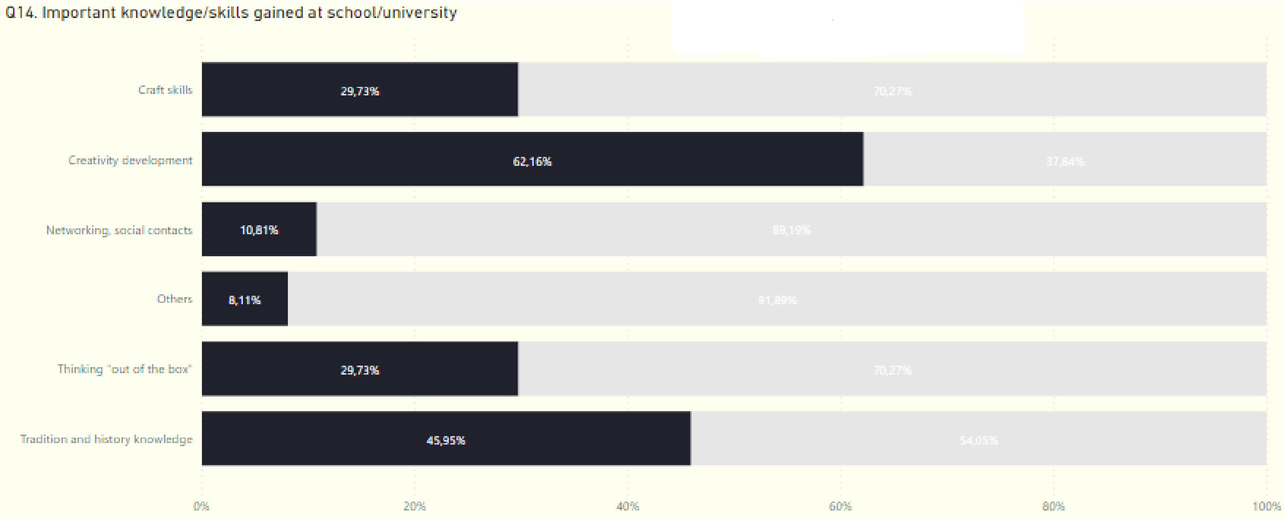


Figure 18 (Italy) Lack in students' knowledge

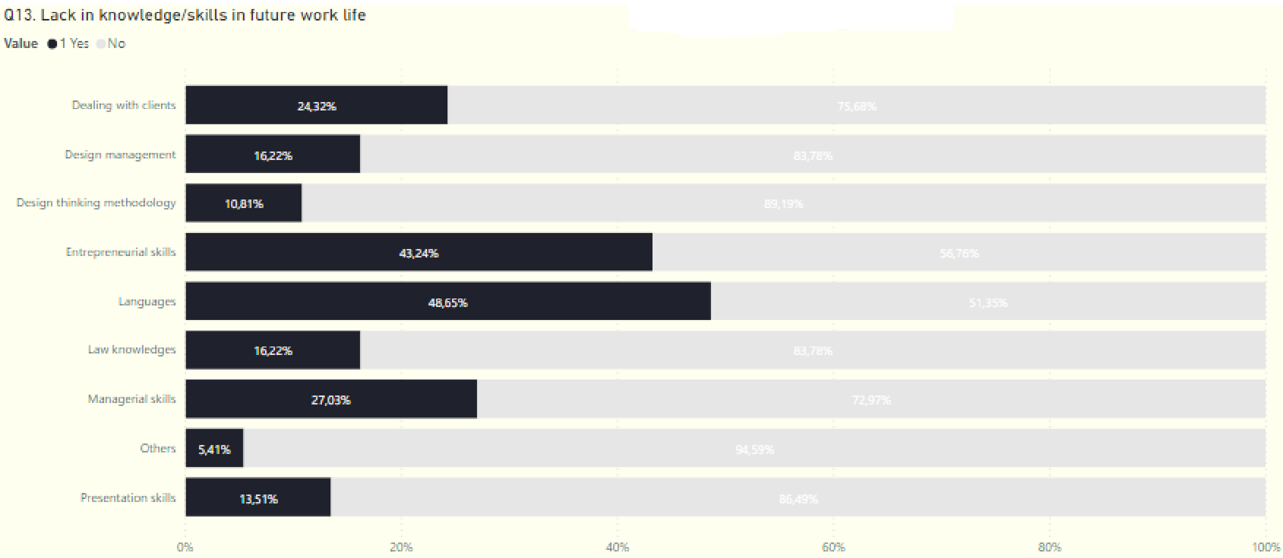


Figure 19 (Italy) Help with starting own business of finding a job

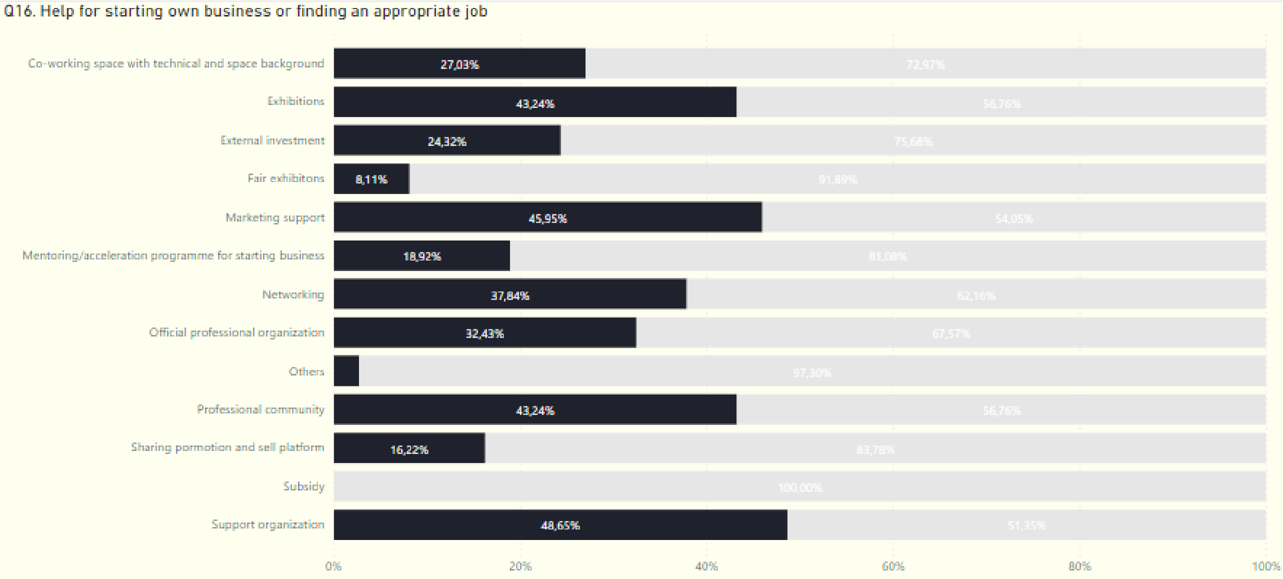
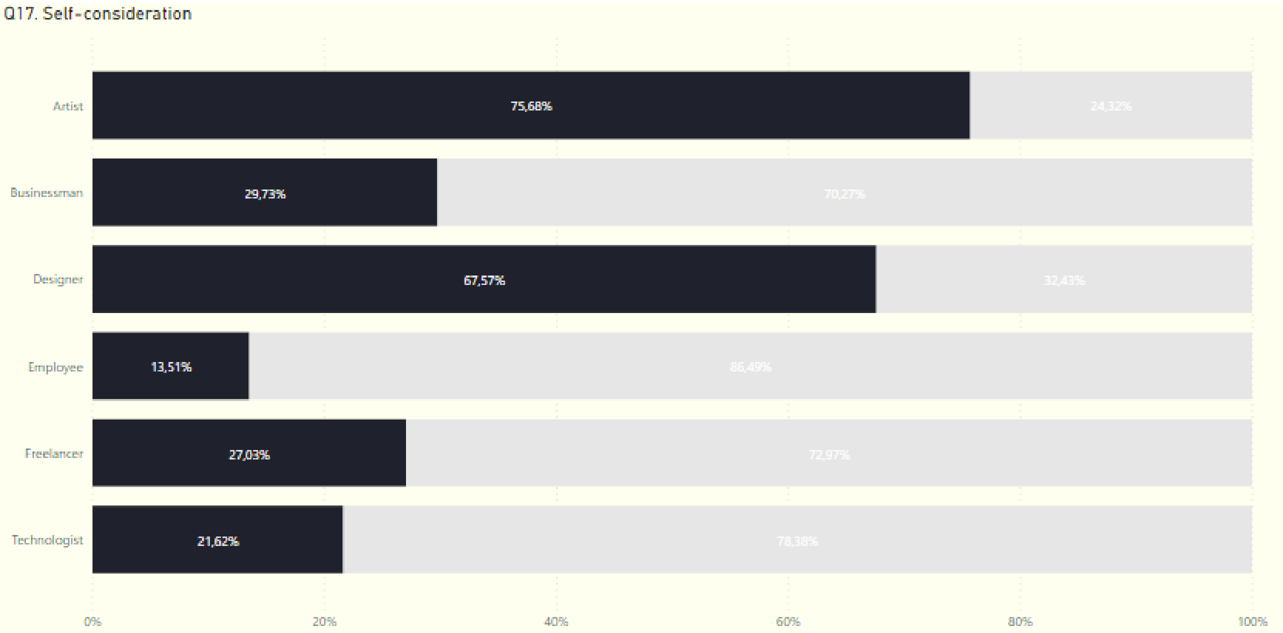


Figure 20 (Italy) Students' self-consideration



6.4.3. Expectations and needs of stakeholders

Figure 21 (Italy) Situation in ceramic sector

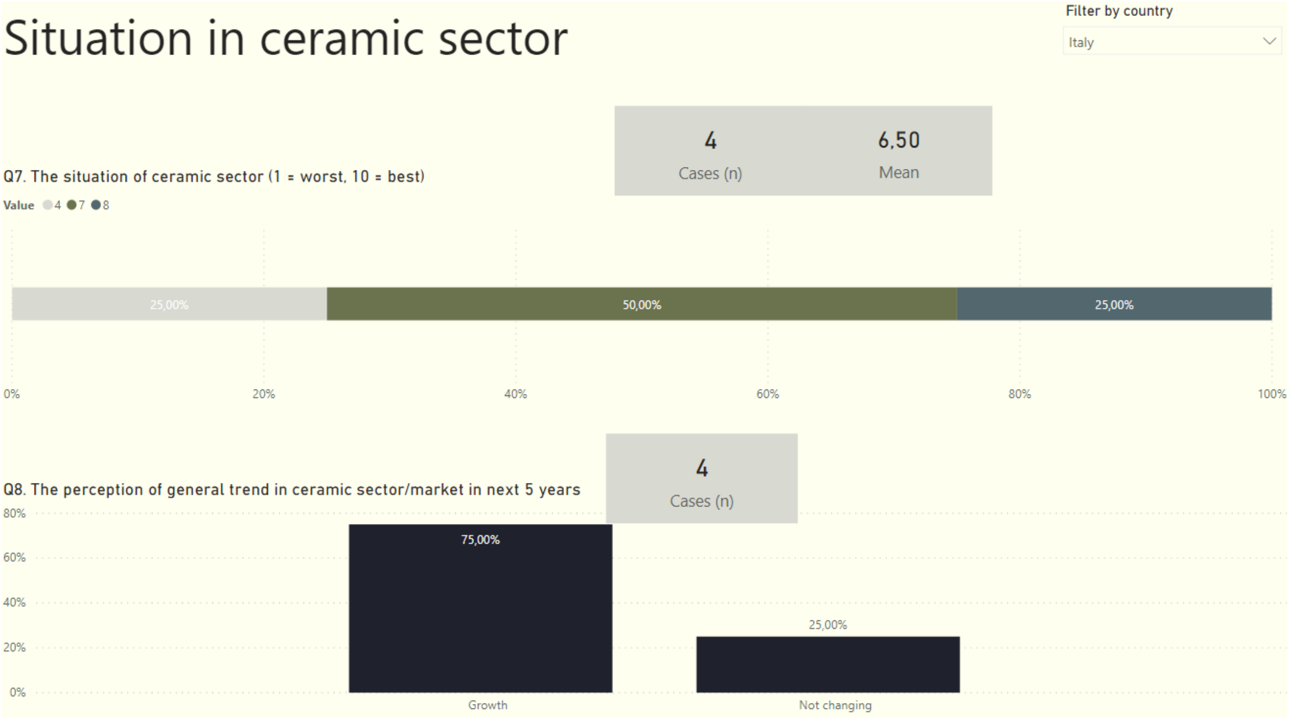


Figure 22 (Italy) Intensity of current cooperation

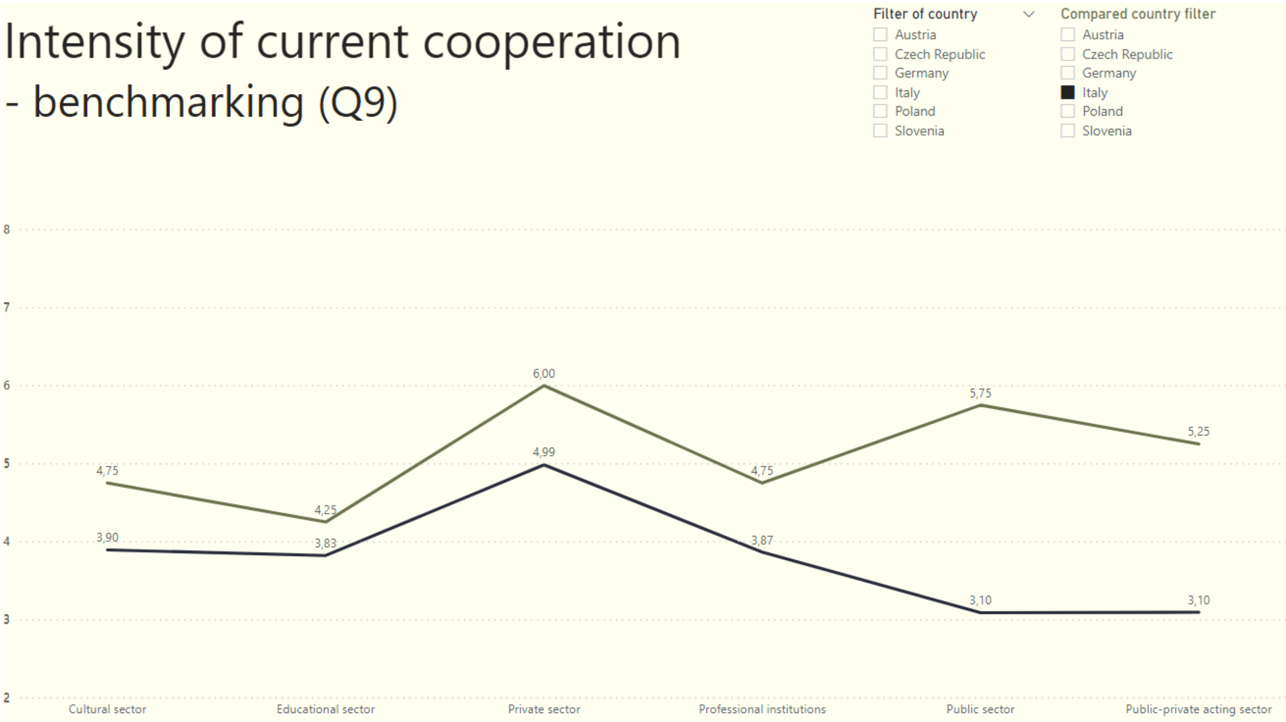


Figure 23 (Italy) Importance of cooperation

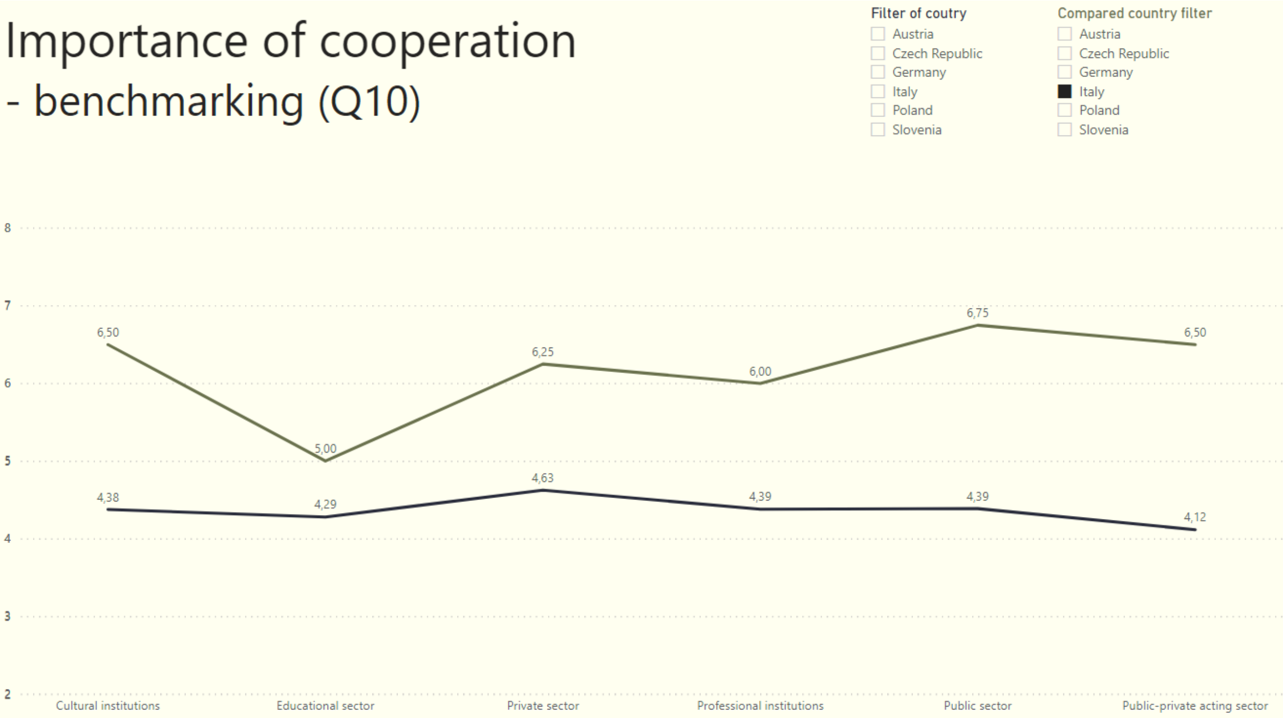


Figure 24 (Italy) Influence level

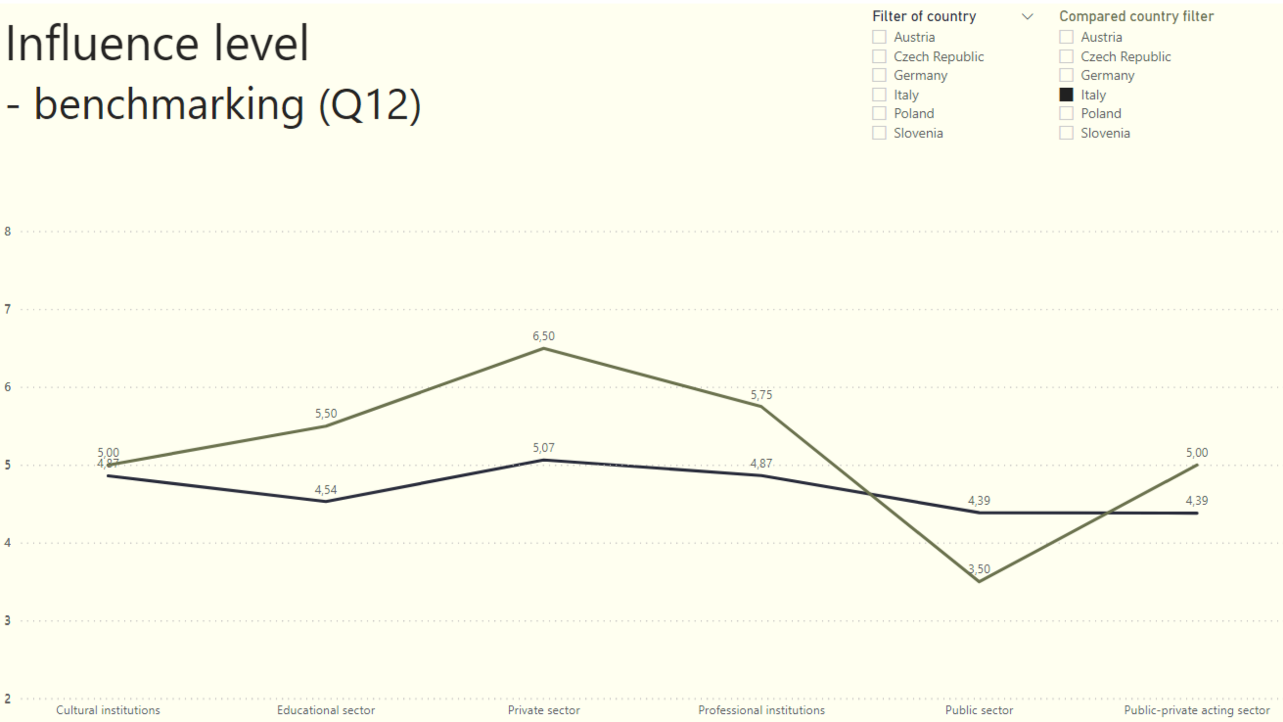
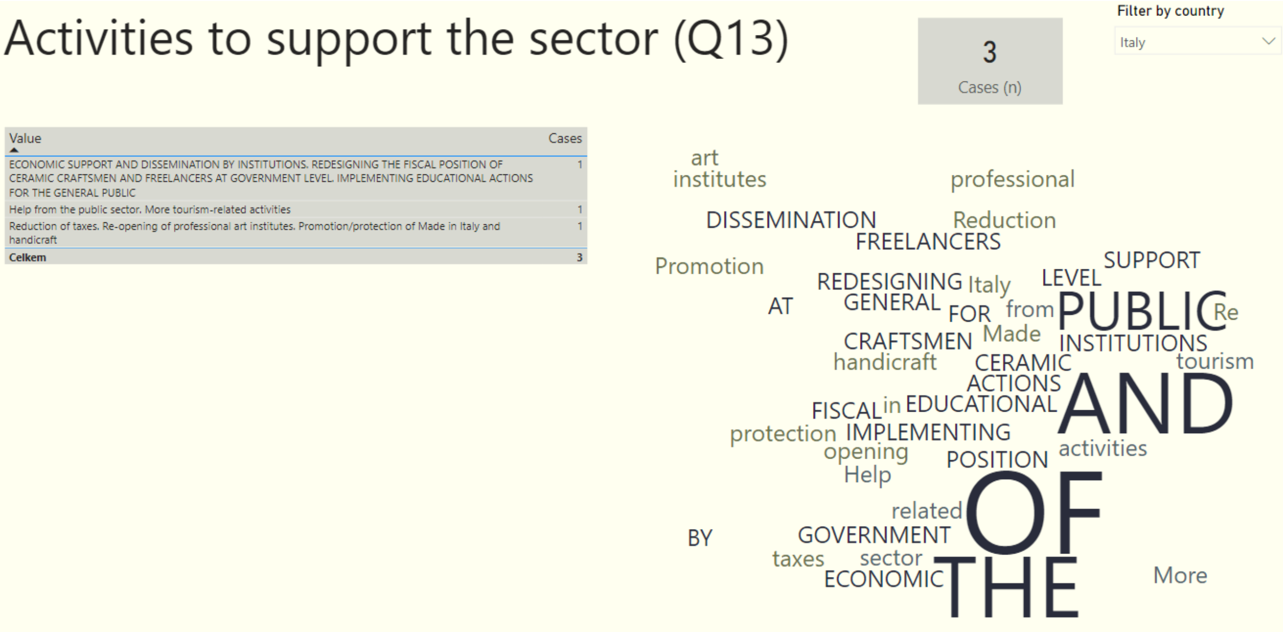


Figure 25 (Italy) Activities to support the sector



Value	Cases
ECONOMIC SUPPORT AND DISSEMINATION BY INSTITUTIONS. REDESIGNING THE FISCAL POSITION OF CERAMIC CRAFTSMEN AND FREELANCERS AT GOVERNMENT LEVEL. IMPLEMENTING EDUCATIONAL ACTIONS FOR THE GENERAL PUBLIC	1
Help from the public sector. More tourism-related activities	1
Reduction of taxes. Re-opening of professional art institutes. Promotion/protection of Made in Italy and handicraft	1
Celkem	**3**

Figure 26 (Italy) Level of cooperation

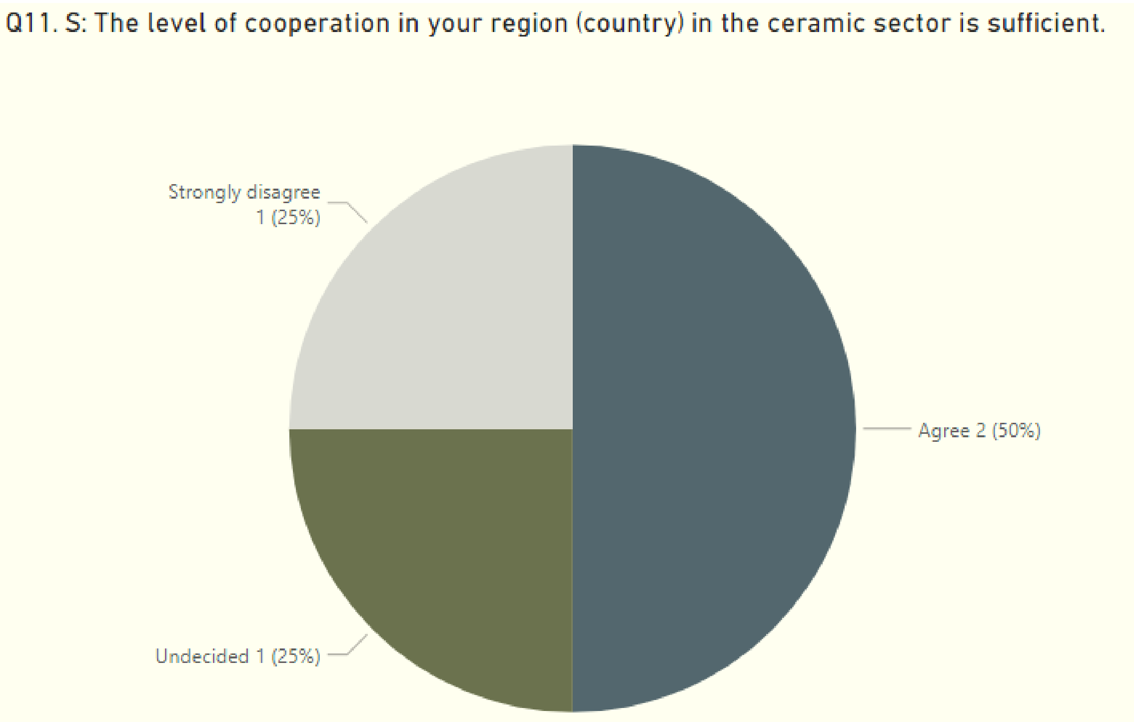


Figure 27 (Italy) Support or cooperation

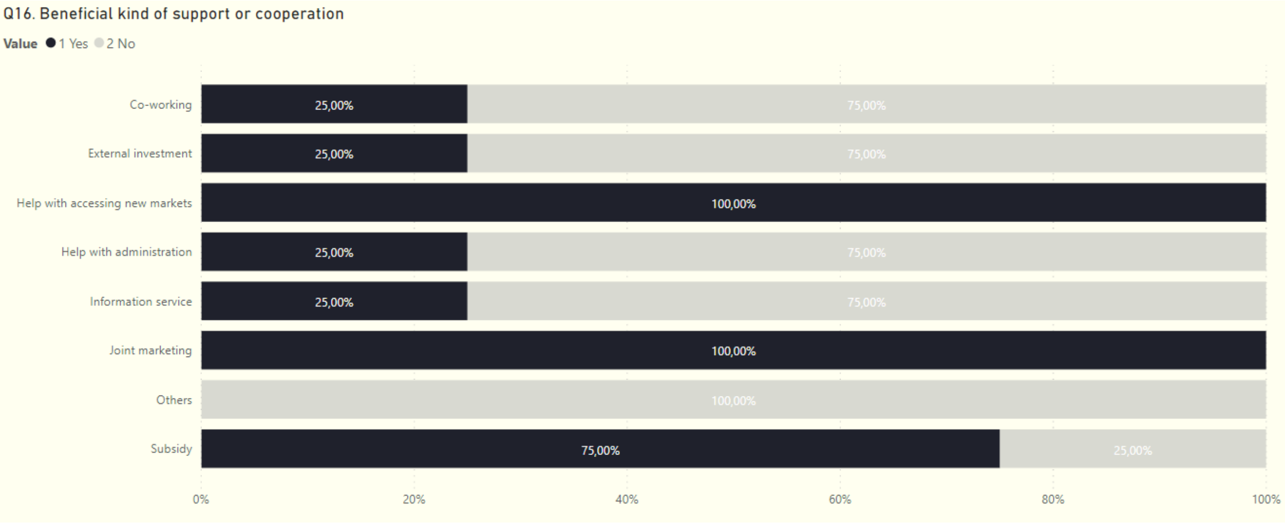


Figure 28 (Italy) Attitude towards a statement

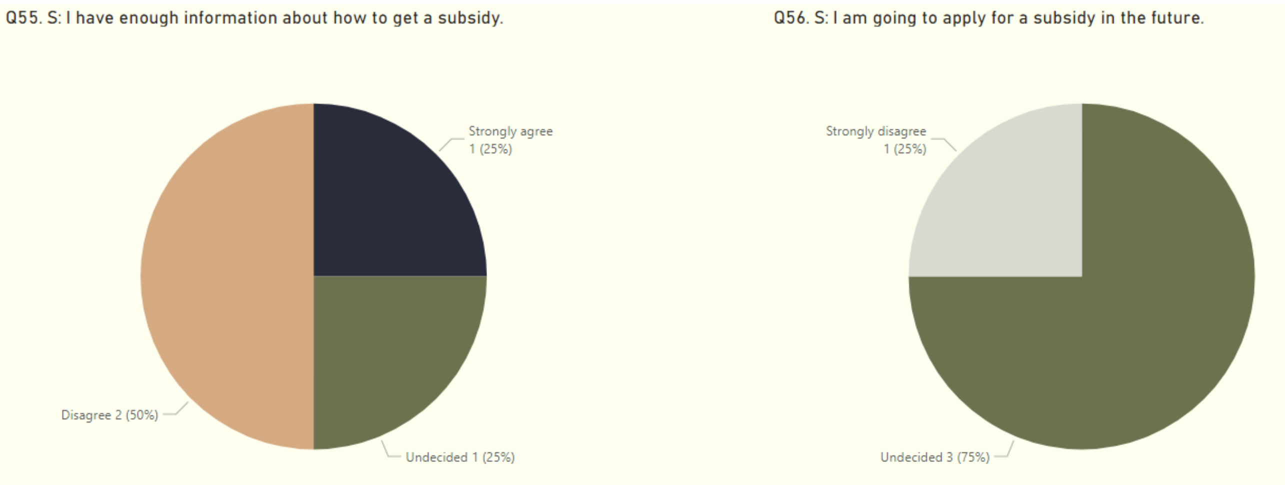
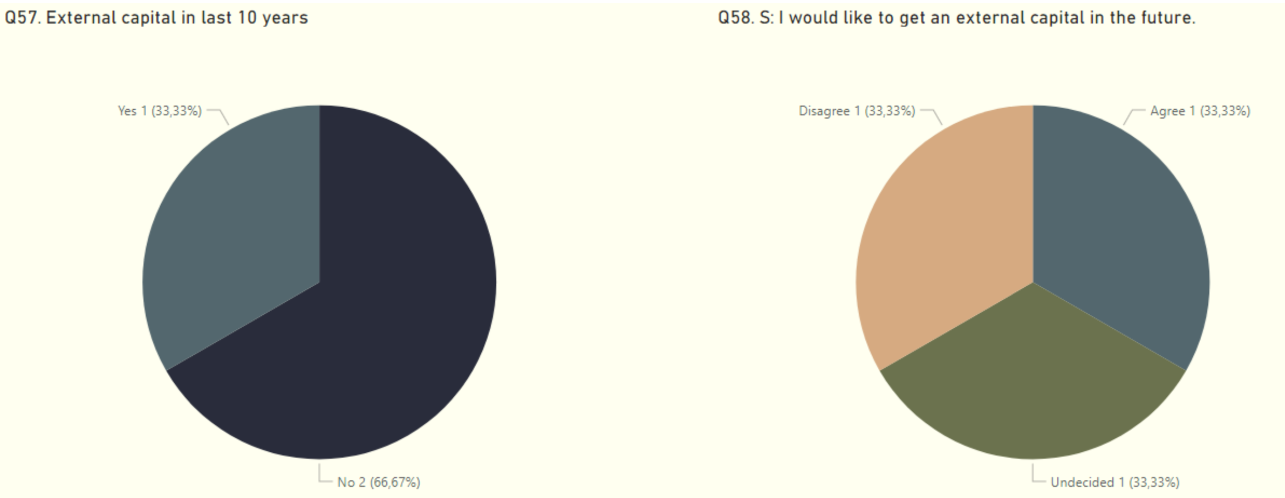


Figure 29 (Italy) Financial situation, attitude towards a statement



6.4.4. Marketing activities

Figure 30 (Italy) Currently used marketing activities

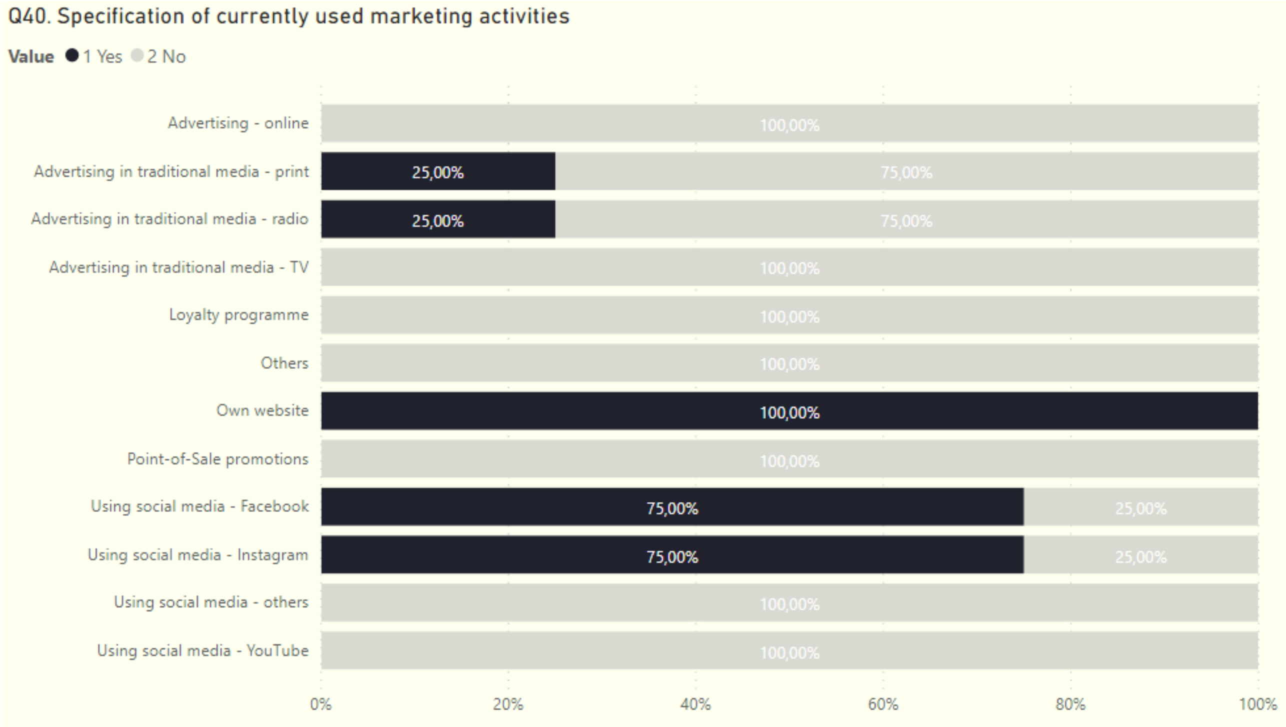


Figure 31 (Italy) Marketing activities planned for the future

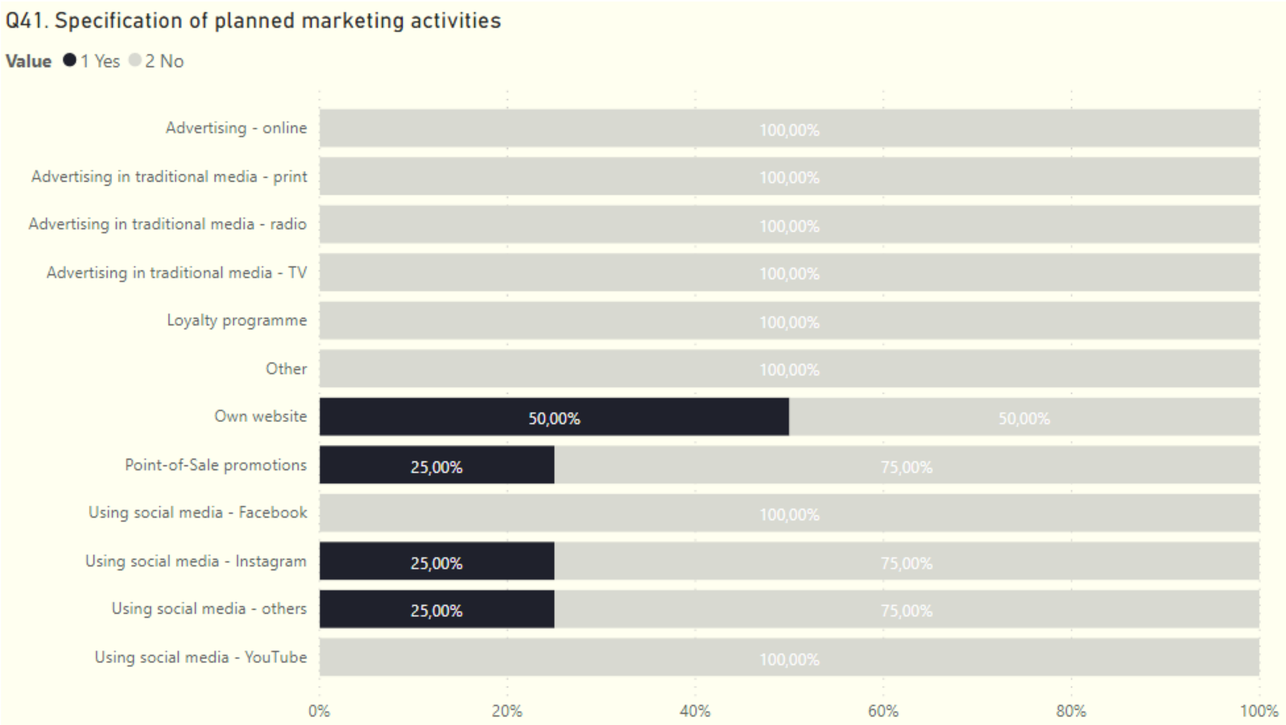


Figure 32 (Italy) Responsibility for marketing activities

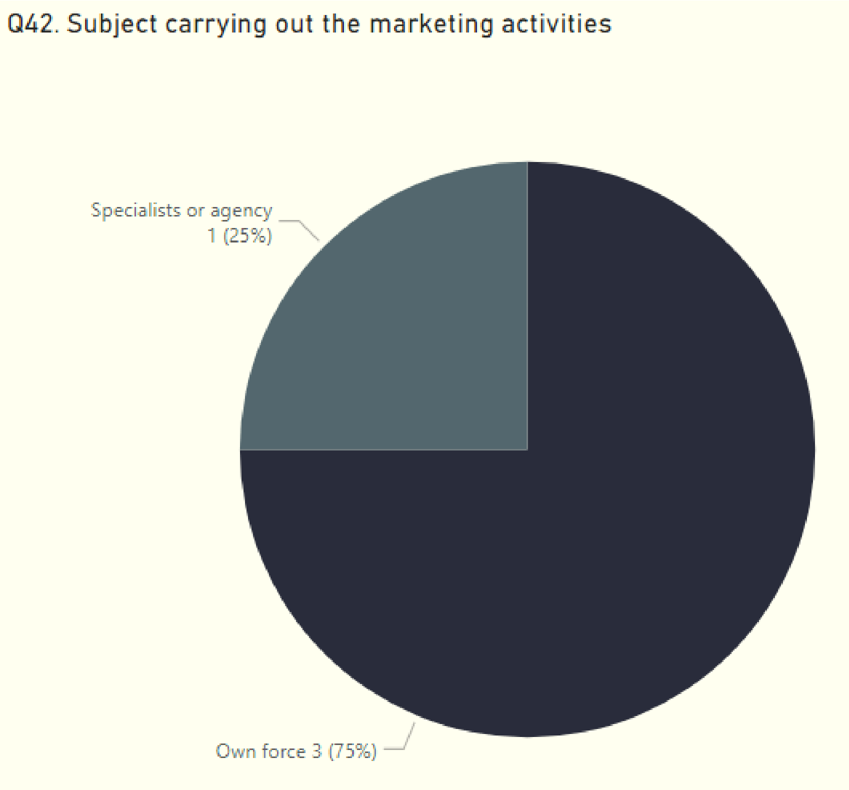


Figure 33 (Italy) Participating in the marketing activities

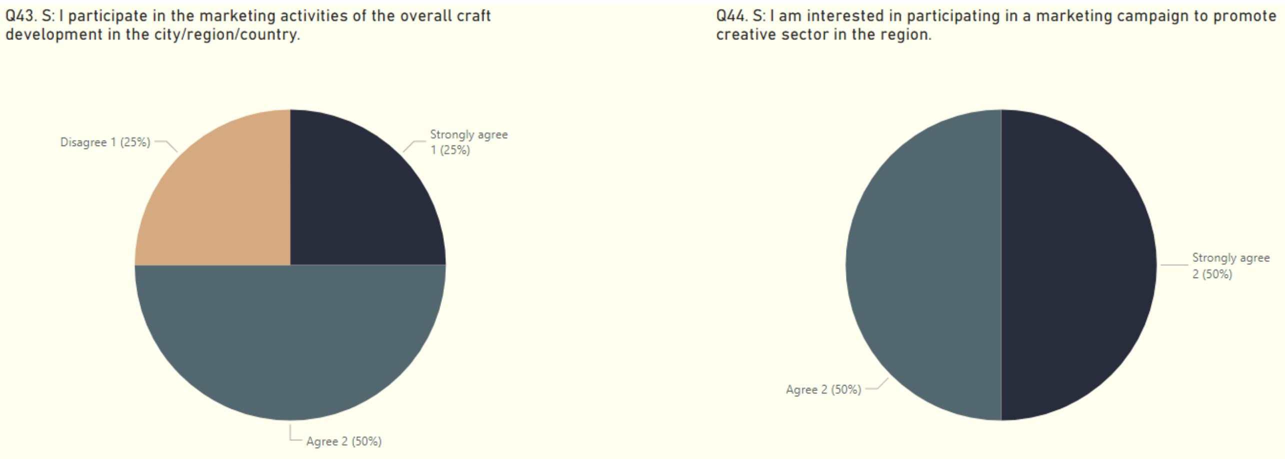


Figure 34 (Italy) Marketing activities on social networks

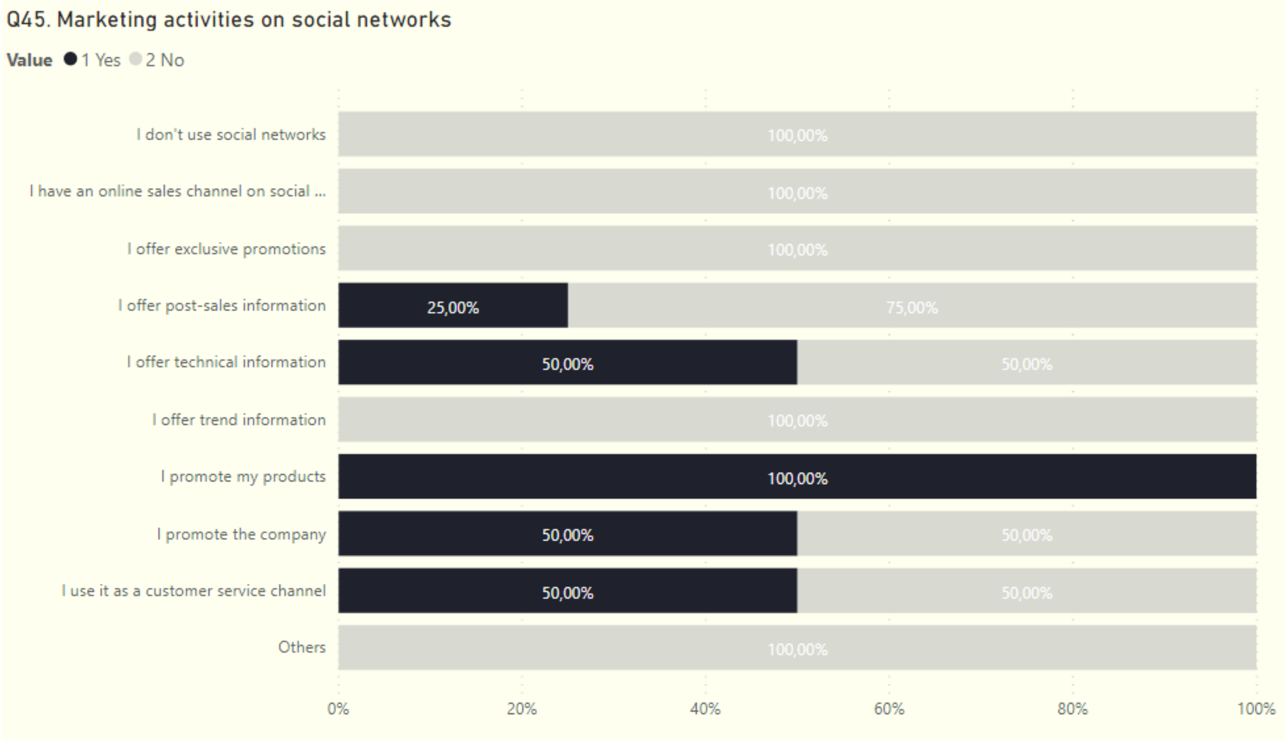


Figure 35 (Italy) Feedback on social media

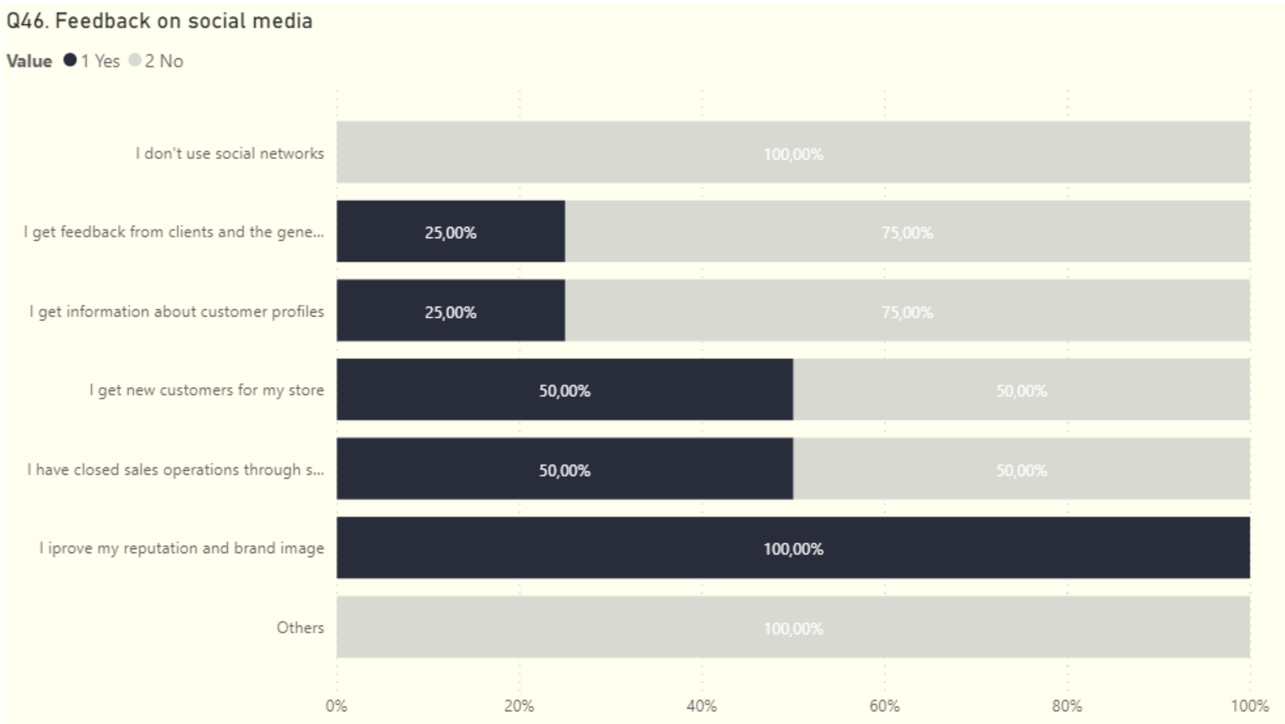


Figure 36 (Italy) Currently used distribution channels

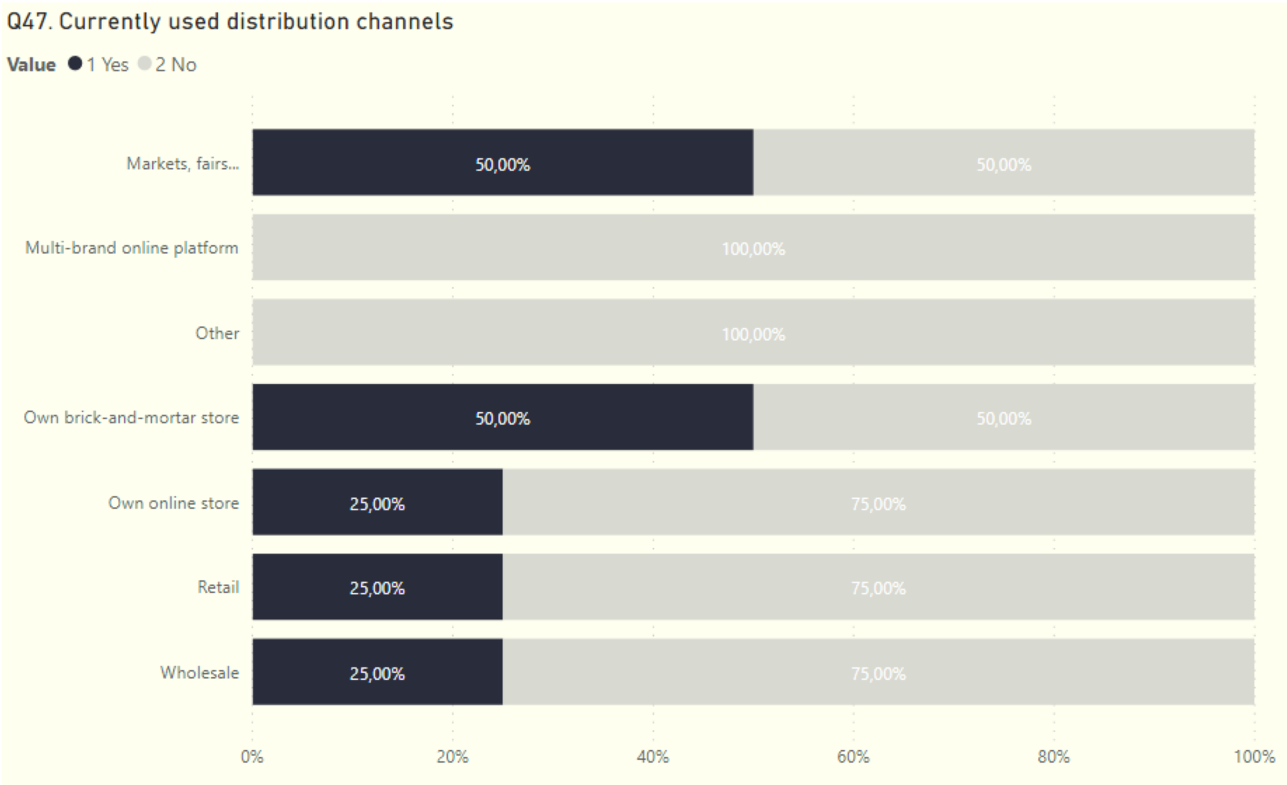
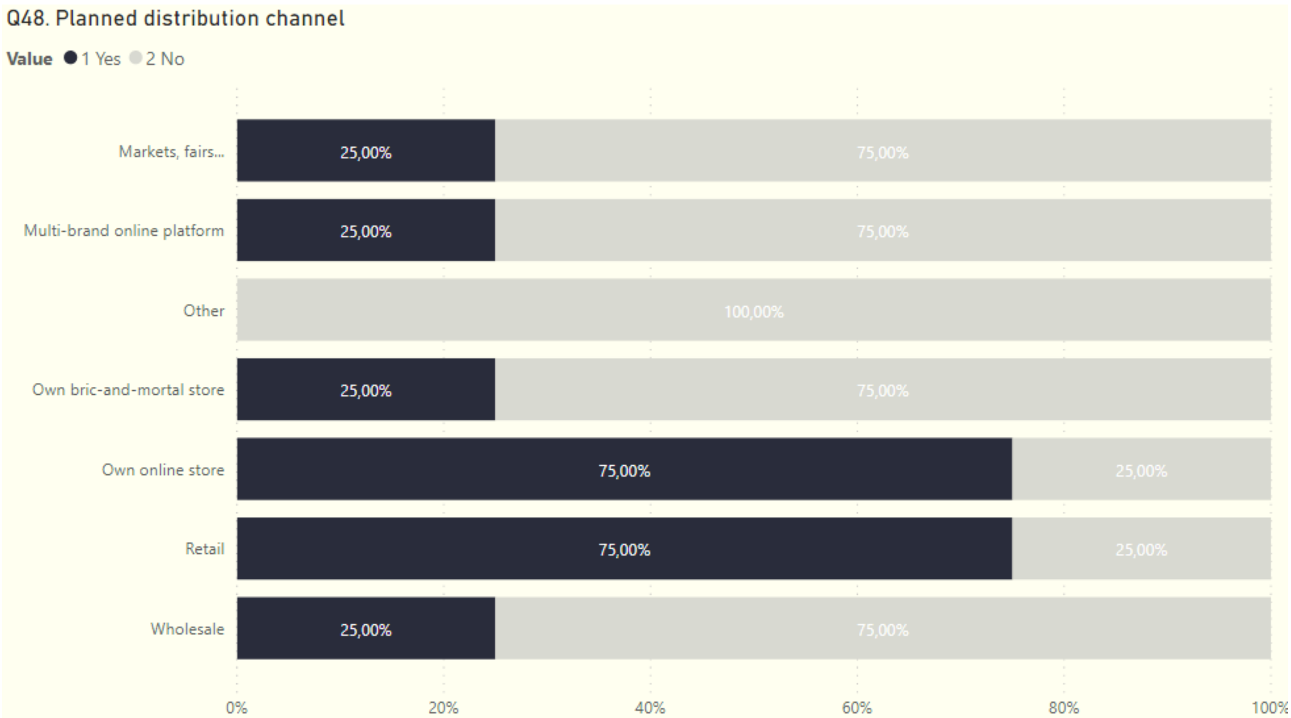


Figure 37 (Italy) Planned distribution channels



6.5. Annexes Poland

6.5.1. Businesses as existing entrepreneurial capacities - graphical overview

Figure 1 (Poland) Sample - Legal form of respondents

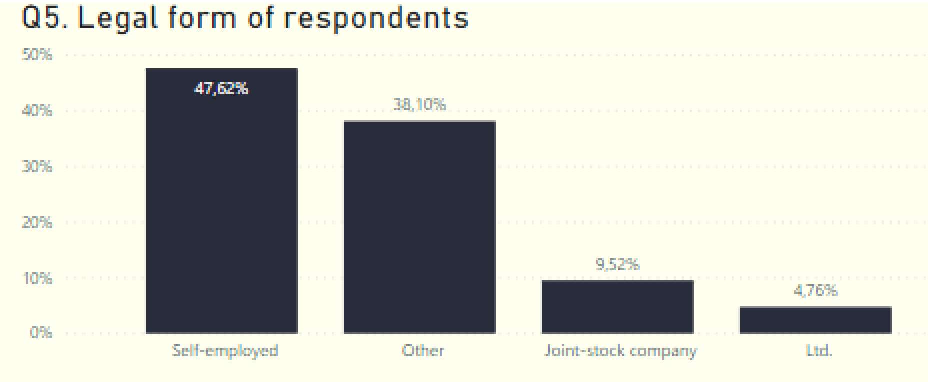


Figure 2 (Poland) Sample - Length of managing business

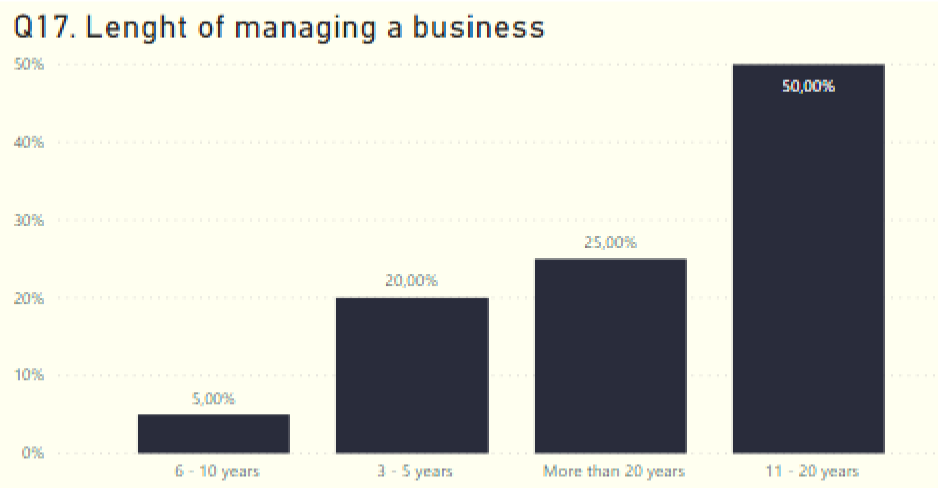


Figure 3 (Poland) Situation in ceramic sector

Figure 4 (Poland) Level of cooperation

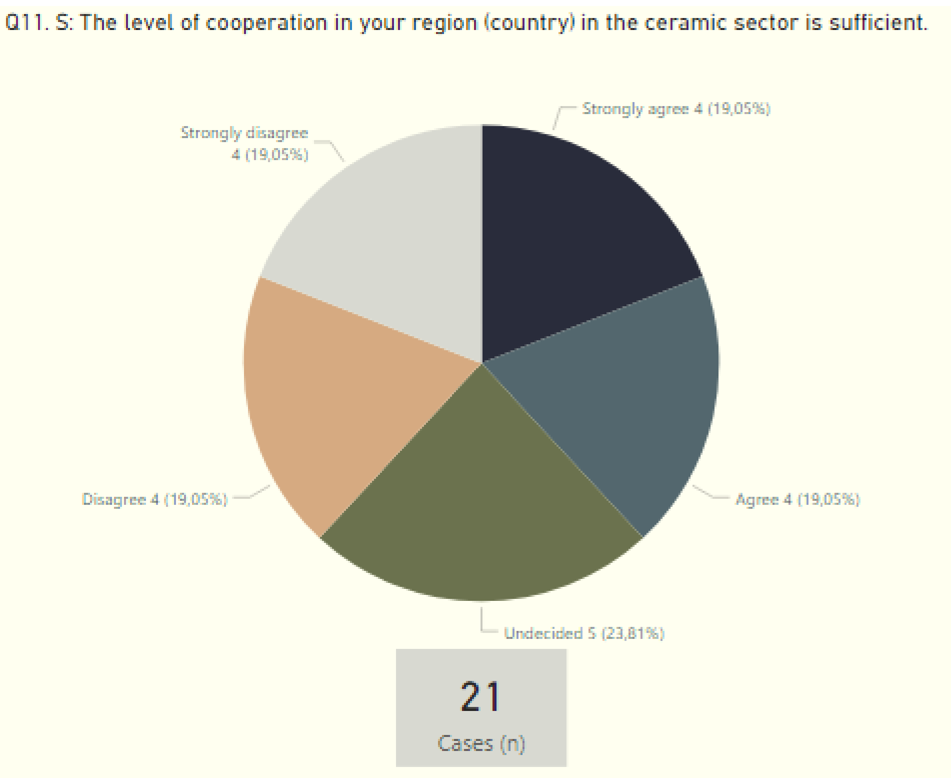


Figure 5 (Poland) Membership in an association

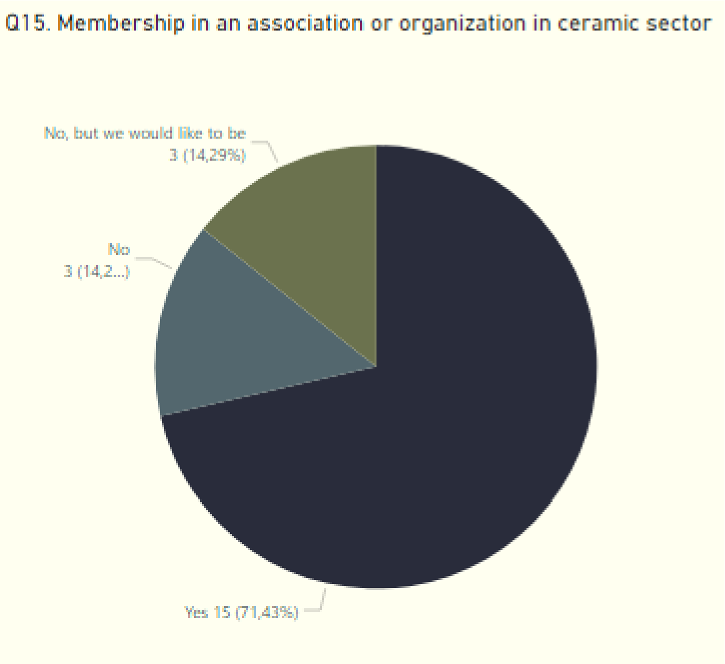


Figure 6 (Poland) Membership in an association

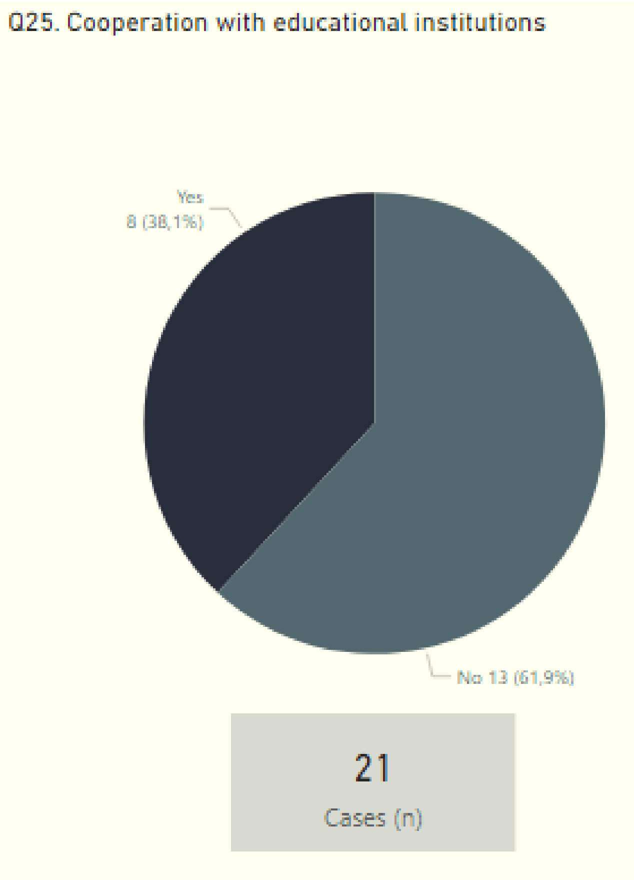


Figure 7 (Poland) Employee and self-training

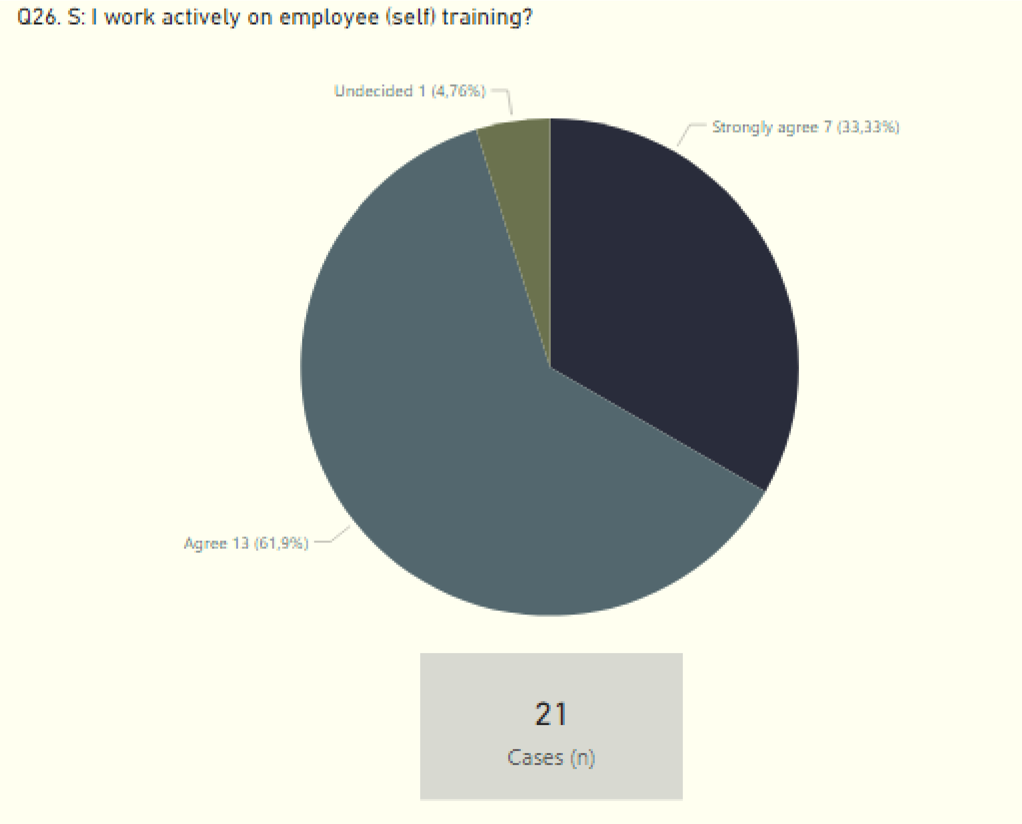


Figure 8 (Poland) Further education and training topics (craft and design skills)

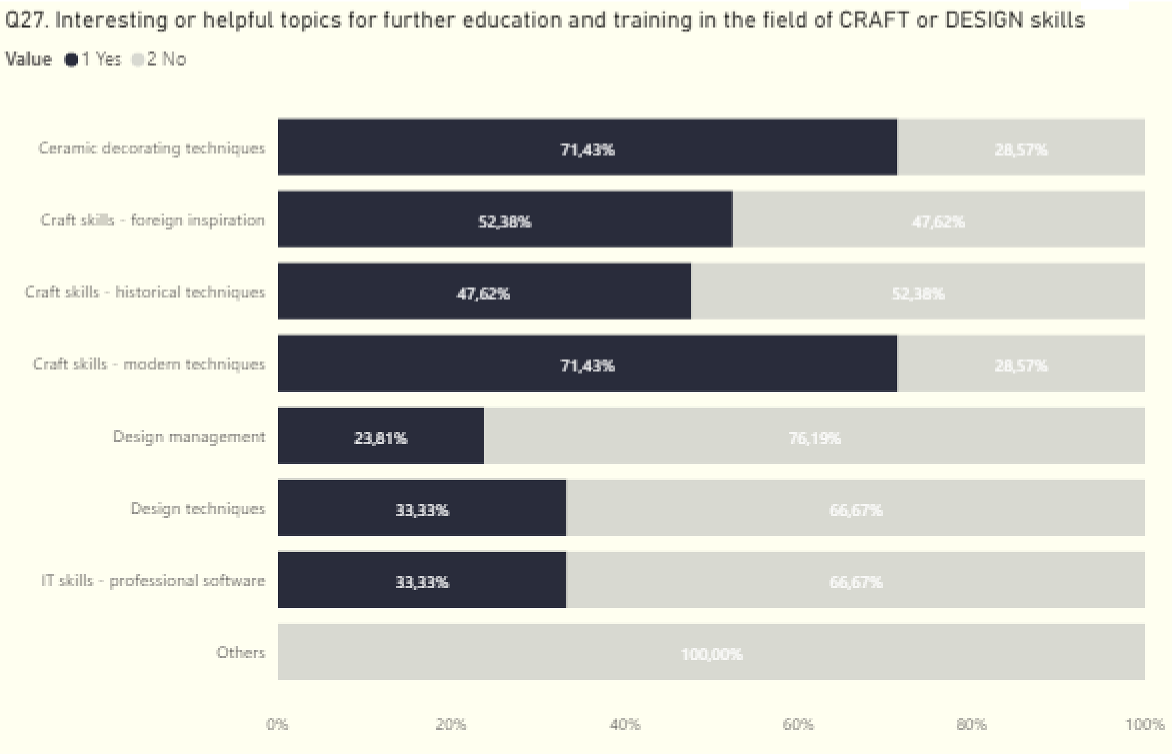


Figure 9 (Poland) Further education and training topics (management, marketing, and business skills)

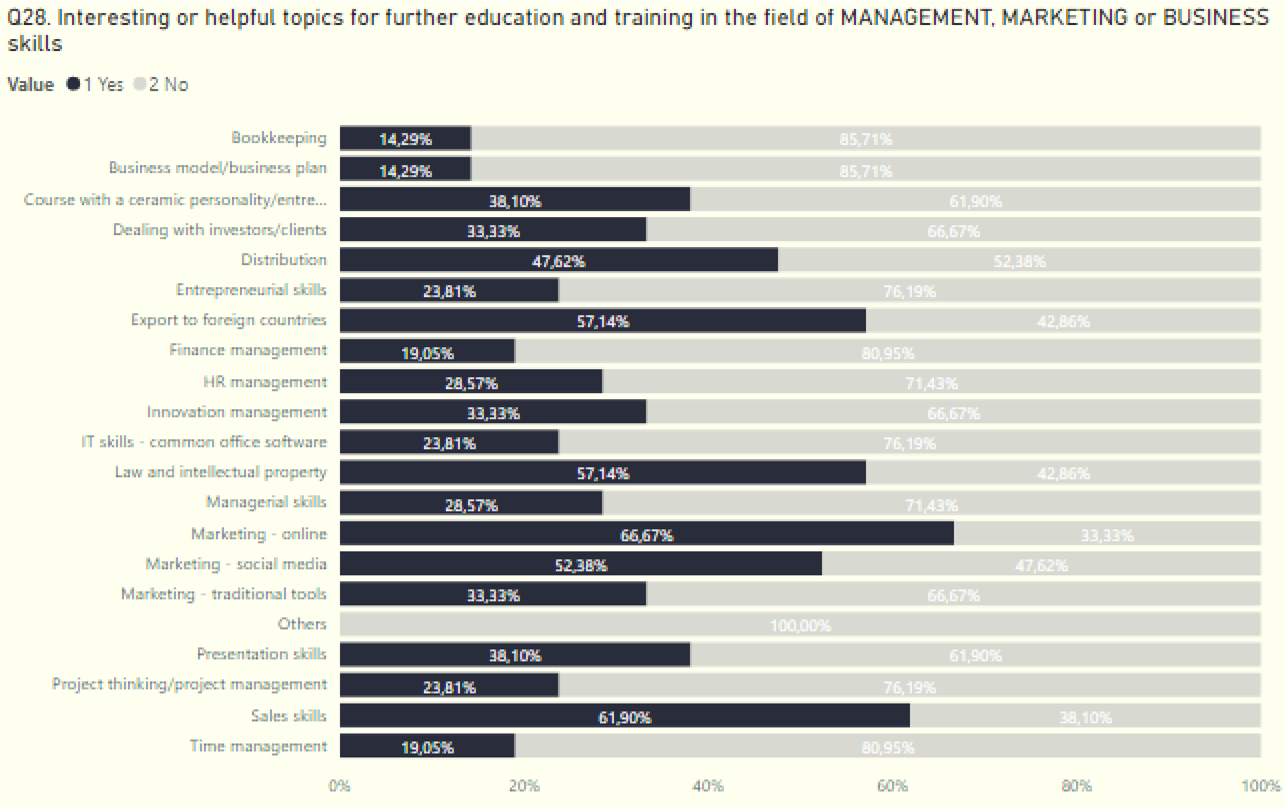


Figure 10 (Poland) Participating in marketing activities in the city/region/country

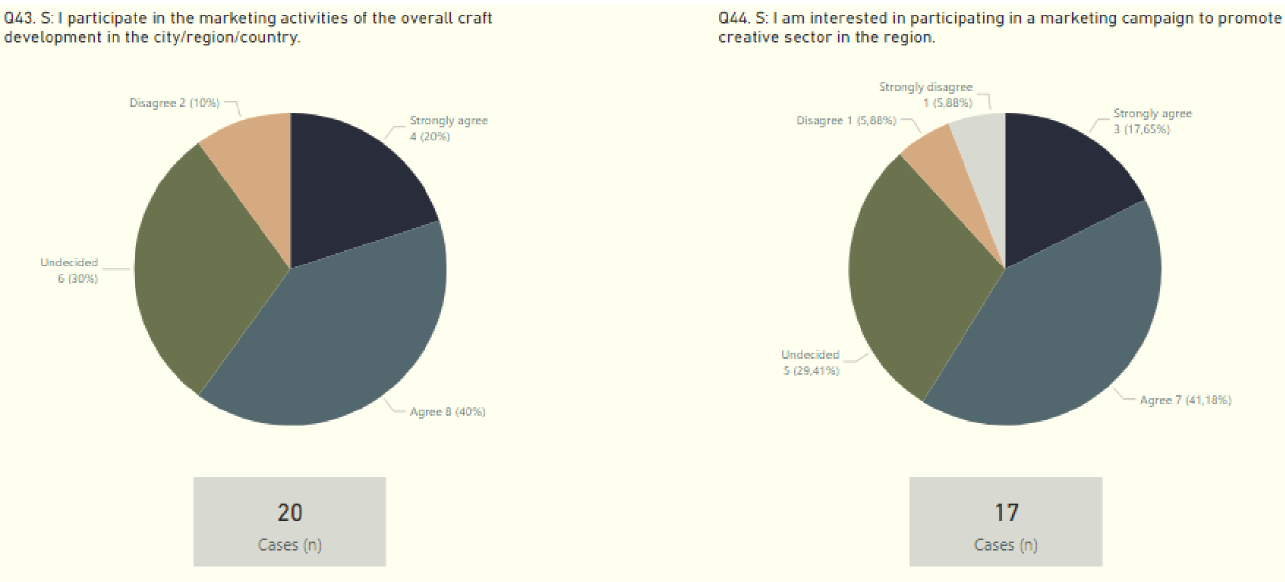


Figure 11 (Poland) A need of international portal about ceramics

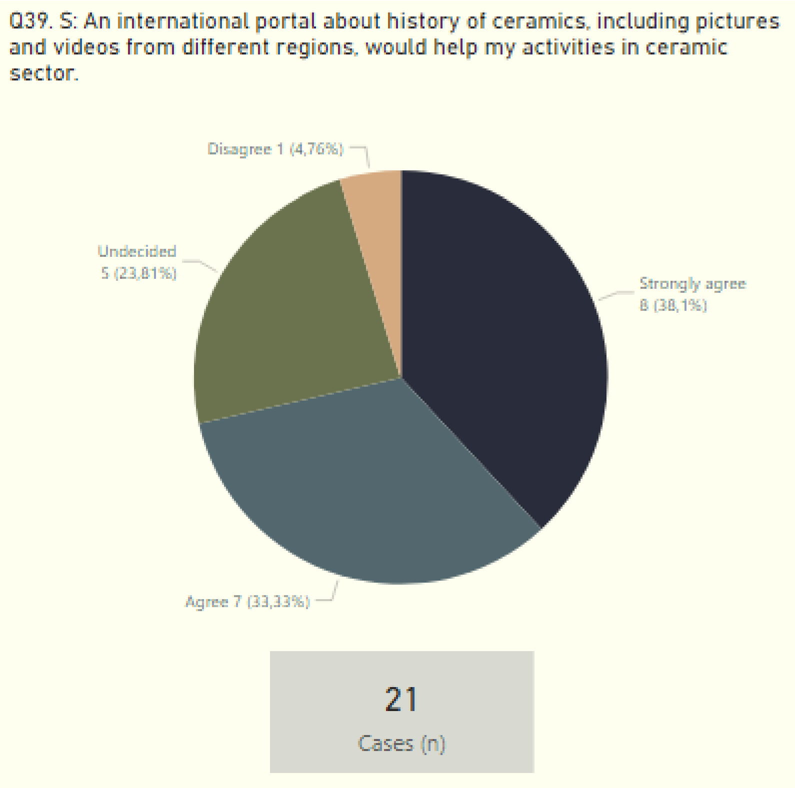
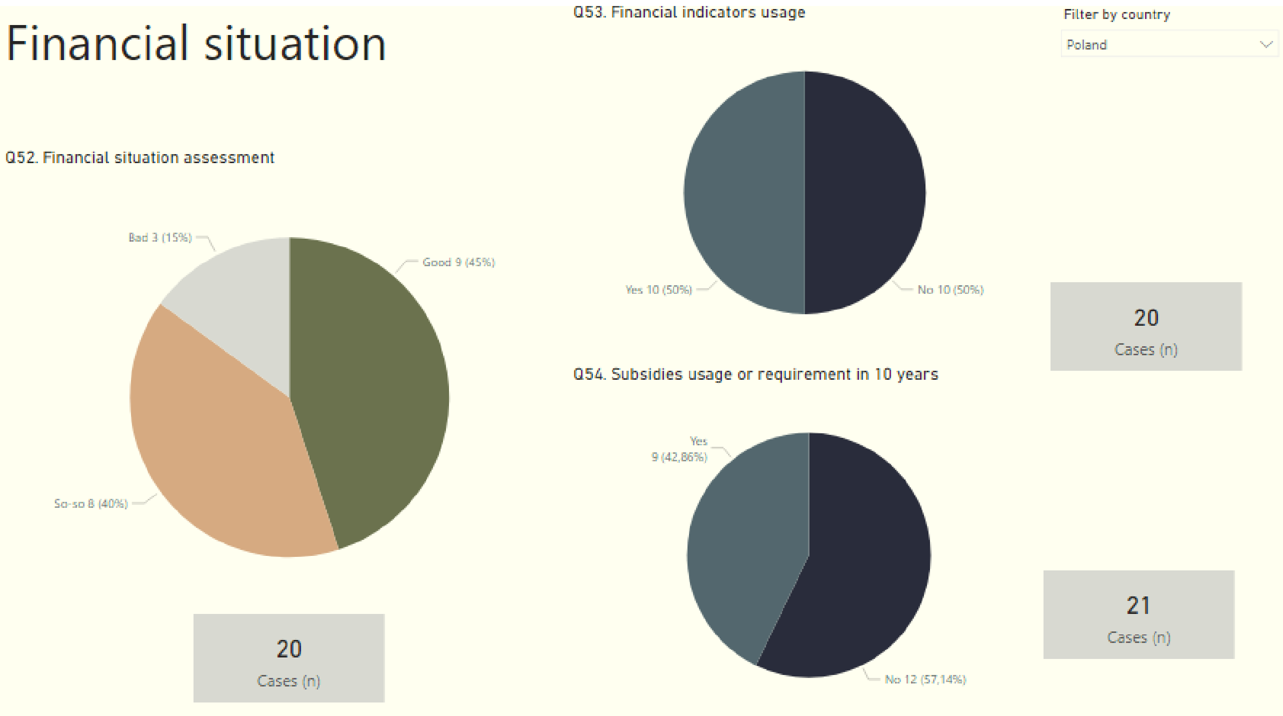


Figure 12 (Poland) Financial situation



6.5.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (Poland) Sample - students

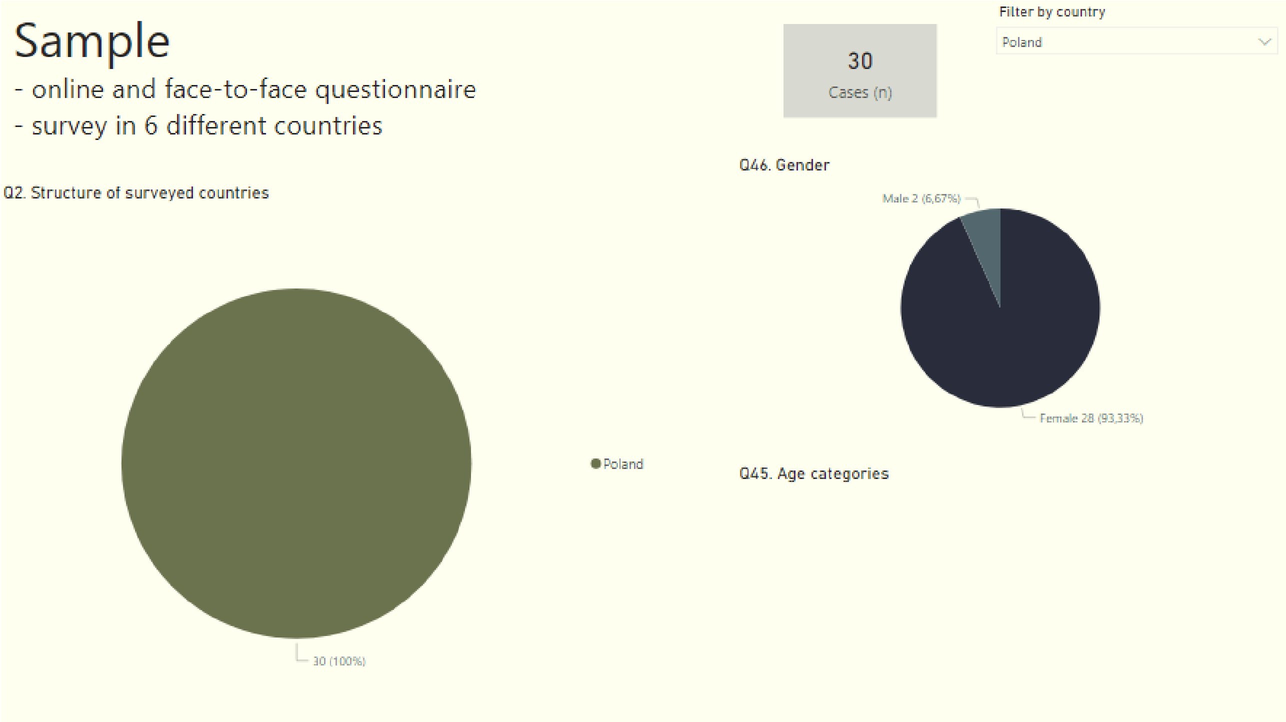


Figure 14 (Poland) Study direction of students

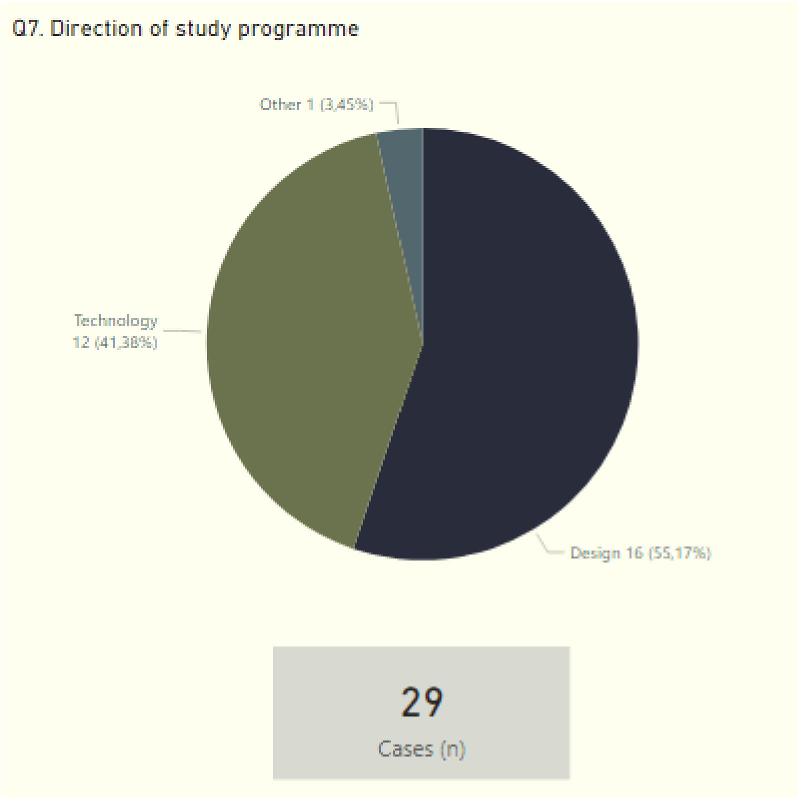


Figure 15 (Poland) Future direction of students

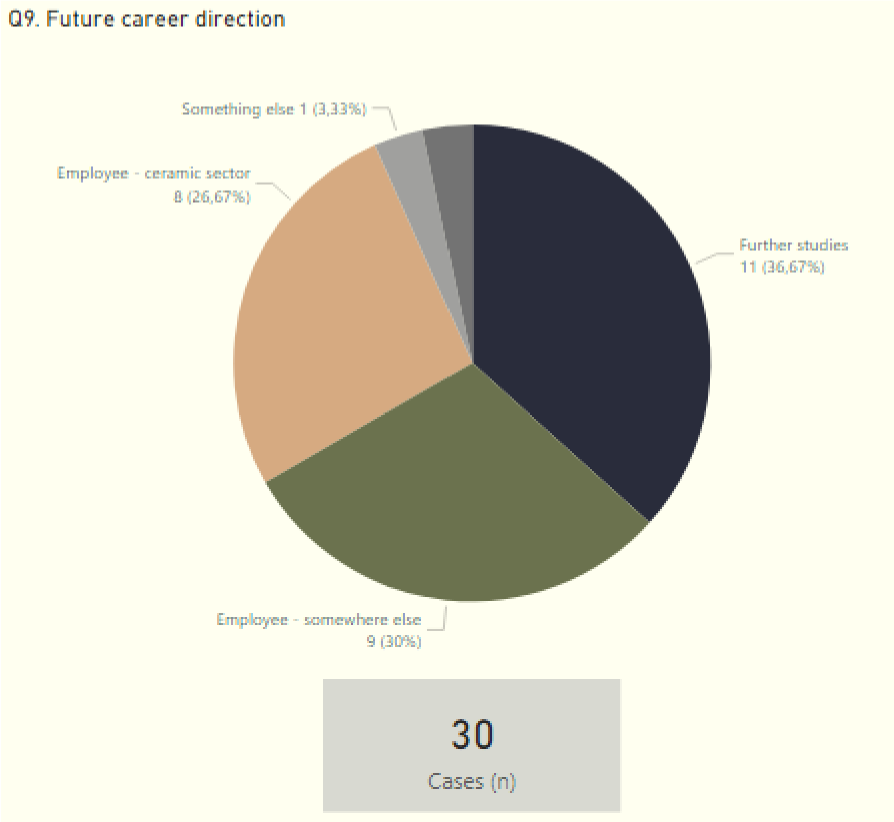


Figure 16 (Poland) Dream job

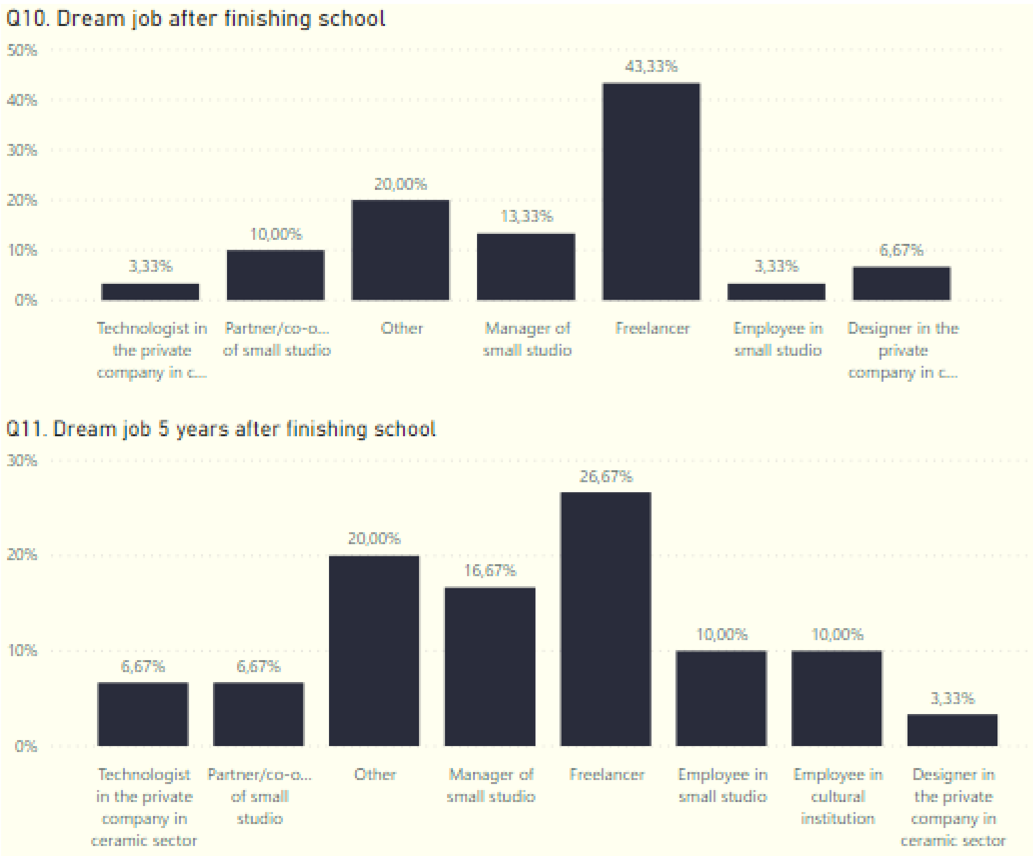


Figure 17 (Poland) Important students’ knowledge/skills gained

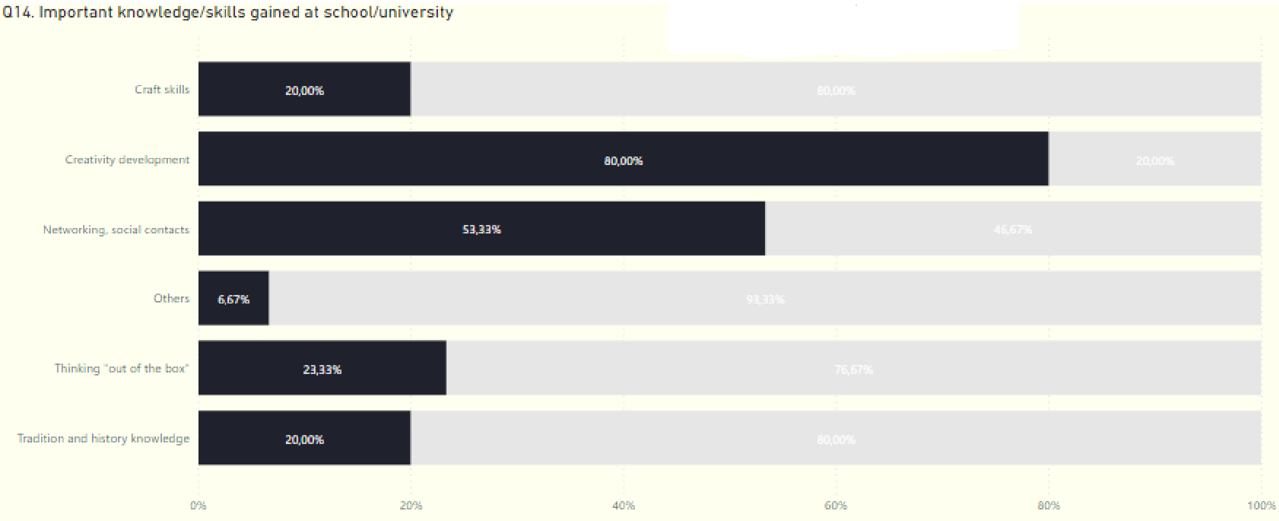


Figure 18 (Poland) Lack in students’ knowledge

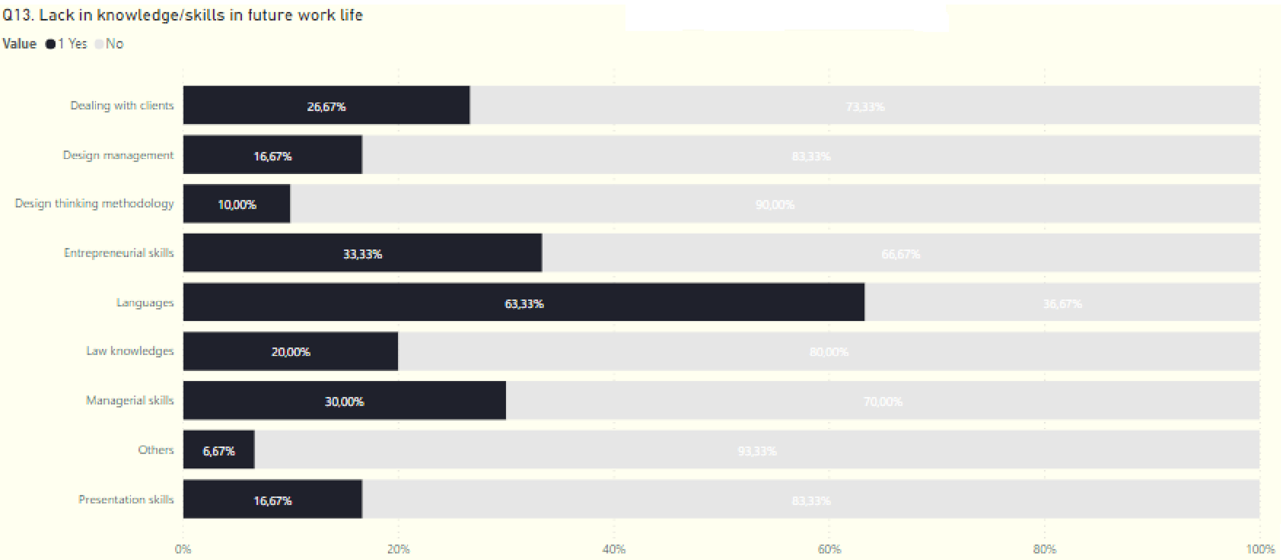


Figure 19 (Poland) Help with starting own business of finding a job

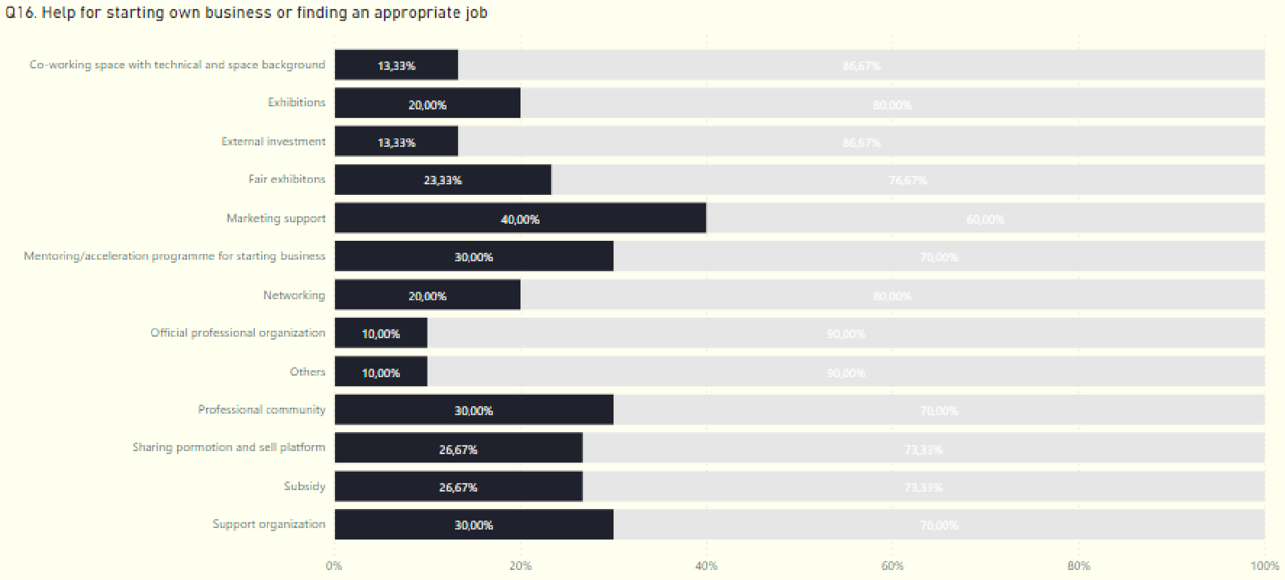
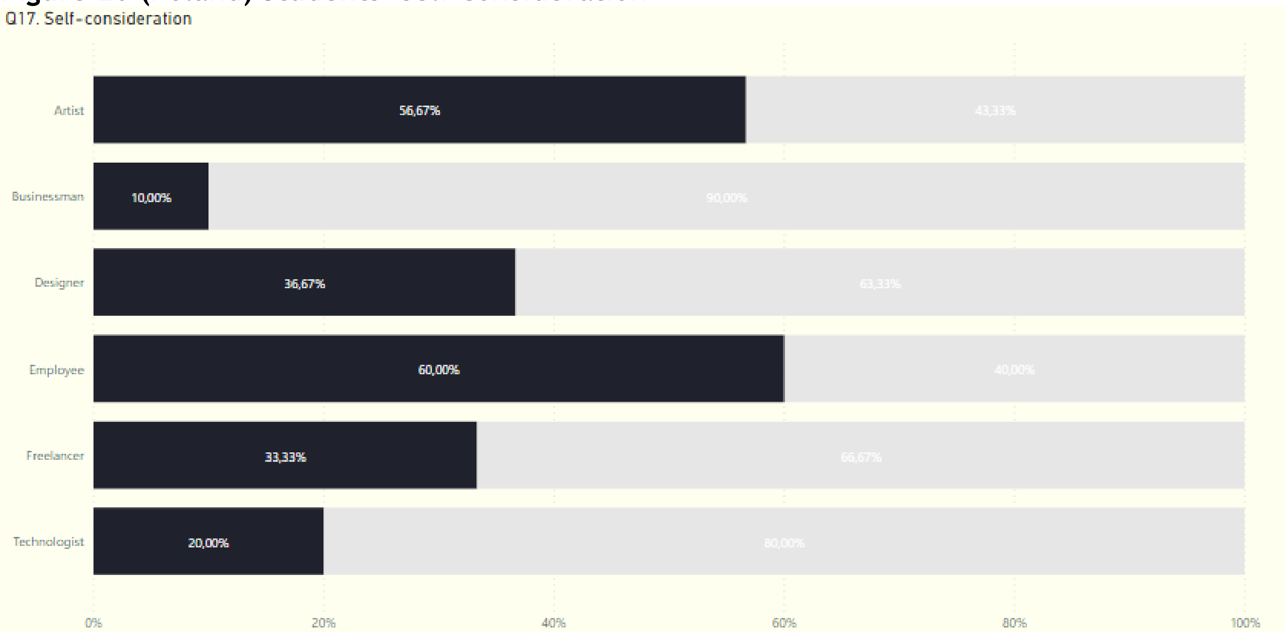


Figure 20 (Poland) Students' self-consideration



6.5.3. Expectations and needs of stakeholders

Figure 21 (Poland) Situation in ceramic sector

Figure 22 (Poland) Intensity of current cooperation

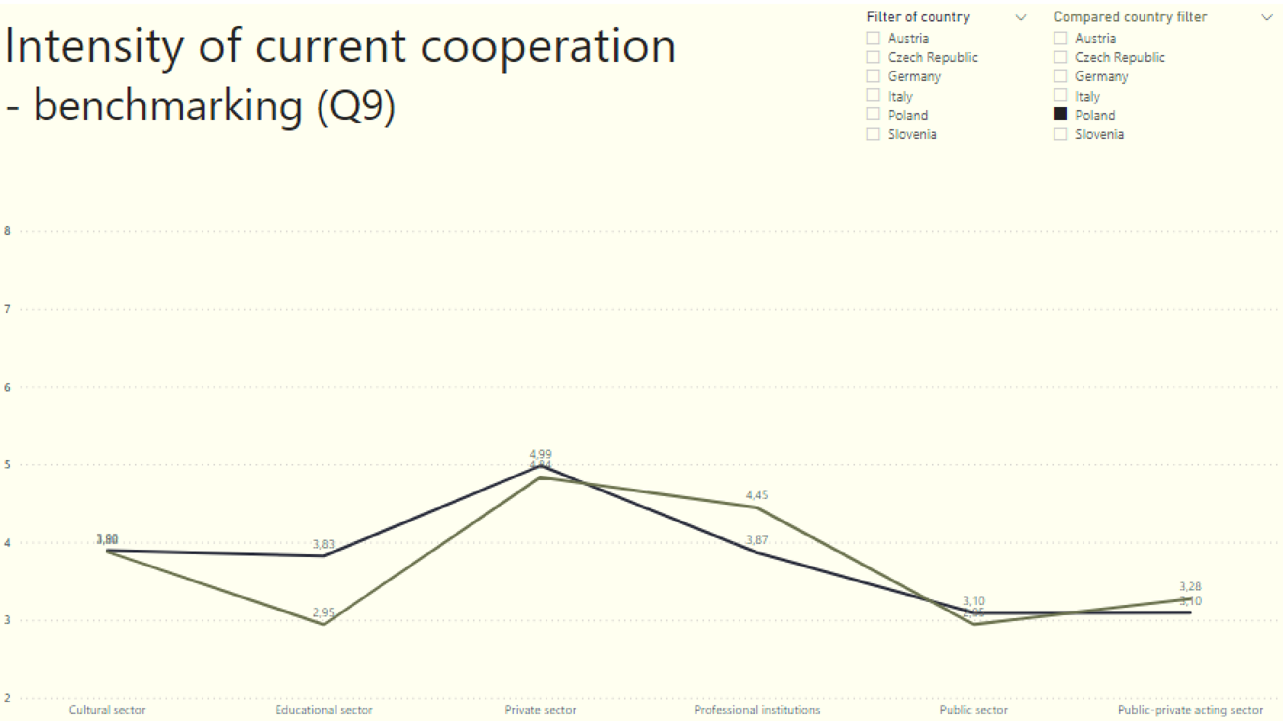


Figure 23 (Poland) Importance of cooperation

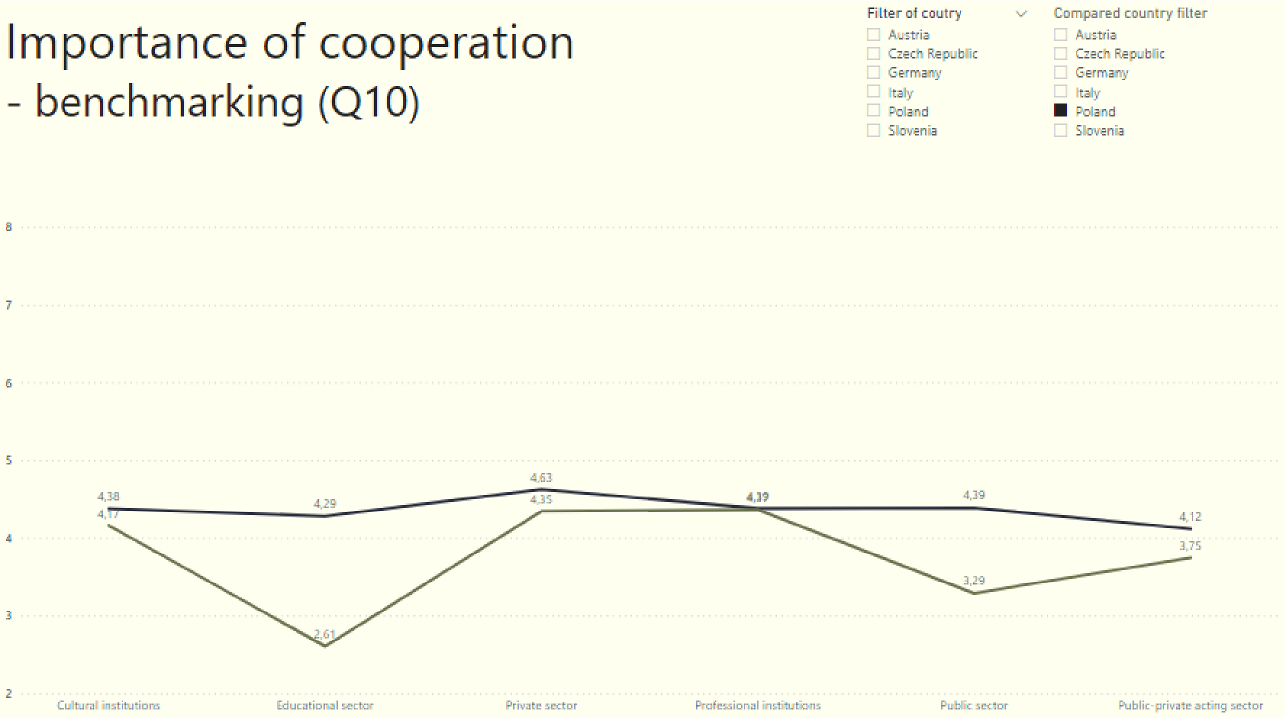


Figure 24 (Poland) Influence level

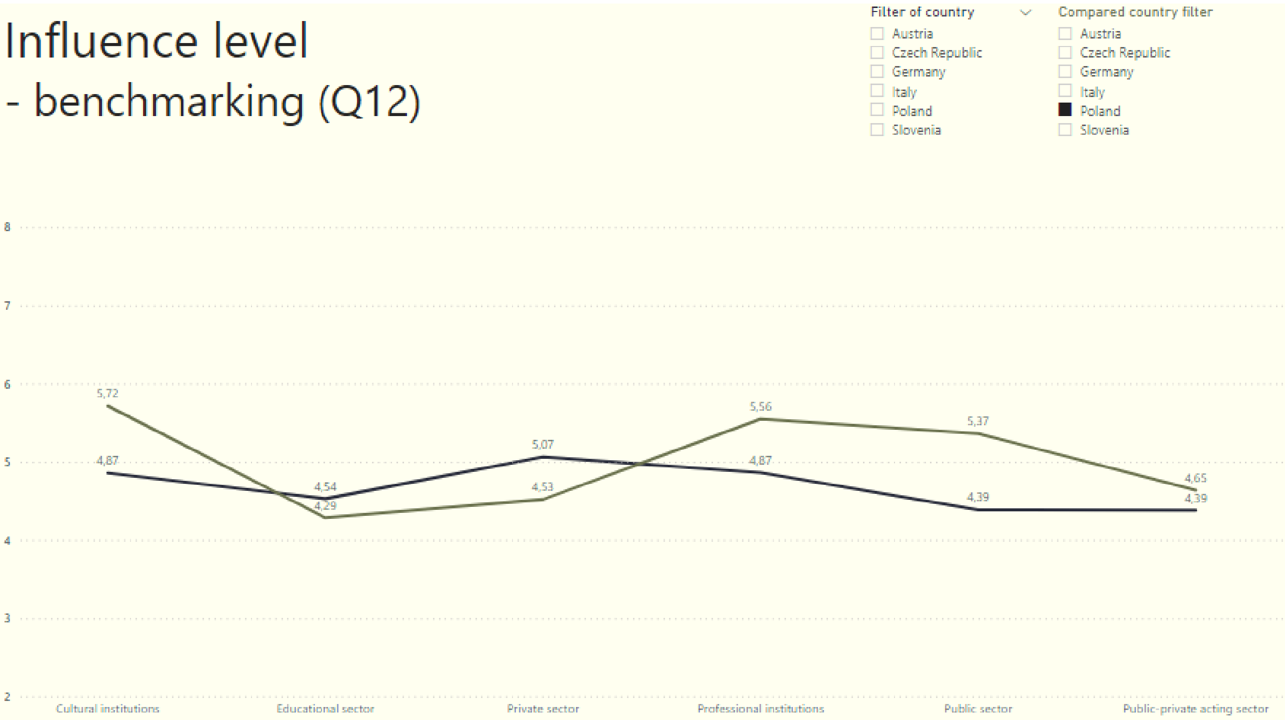


Figure 25 (Poland) Activities to support the sector

Activities to support the sector (Q13)

11

Cases (n)

Filter by country

Poland

Value	Cases
Assistance of local government to obtain EU funds for business development	1
Bolesławiec ceramics = protected geographical indication mark	2
Cooperation between ceramic manufacturers	1
financial support - in marketing and production aspect, co-financing investments in mechanised and automated processes, partial support in reducing energy costs or tax exemptions	1
promotion of handicraft at culture institutions; cooperation between the entities in the sector; training in ceramic technologies and sales promotion; abolition of the tax on artistic article sales	1
Promotion of local suppliers for tourists in the region	1
Stable tax regulations, balanced increase in the minimum wage and electricity cost, investments in renewable energy sources, Bolesławiec ceramics = protected geographical indication mark	1
TALKS, MEETINGS, ETC.	1
Teaching art history at schools, ceramic meetings by cultural institutions and local authorities	1
Trade fairs, exhibitions for the artistic ceramics industry, nationwide website/ facebook fanpage for ceramists	1
Celkem	**11**

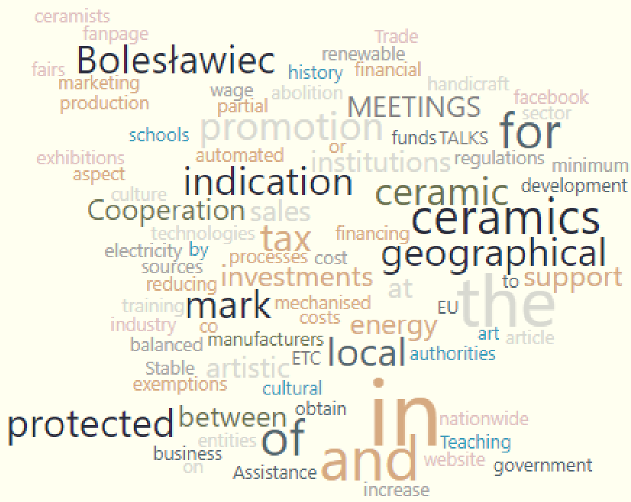
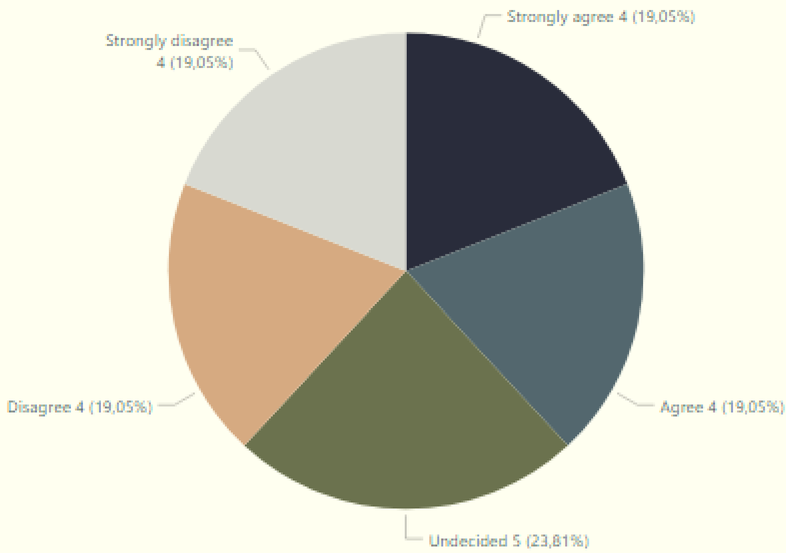


Figure 26 (Poland) Level of cooperation

Q11. S: The level of cooperation in your region (country) in the ceramic sector is sufficient.



21

Cases (n)

Figure 27 (Poland) Support or cooperation

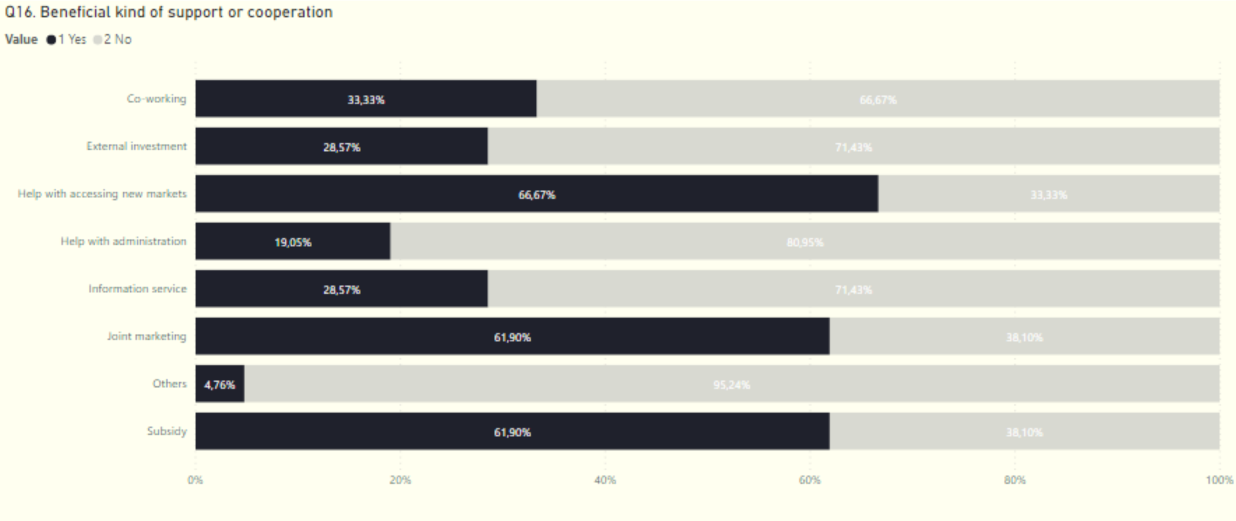


Figure 28 (Poland) Attitude towards a statement

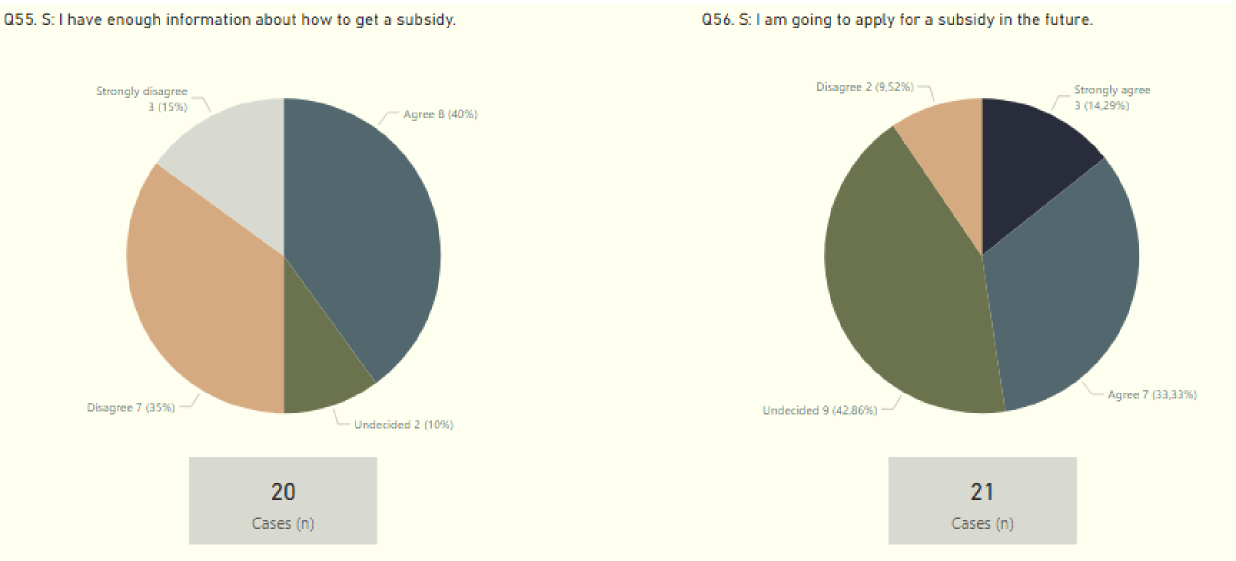
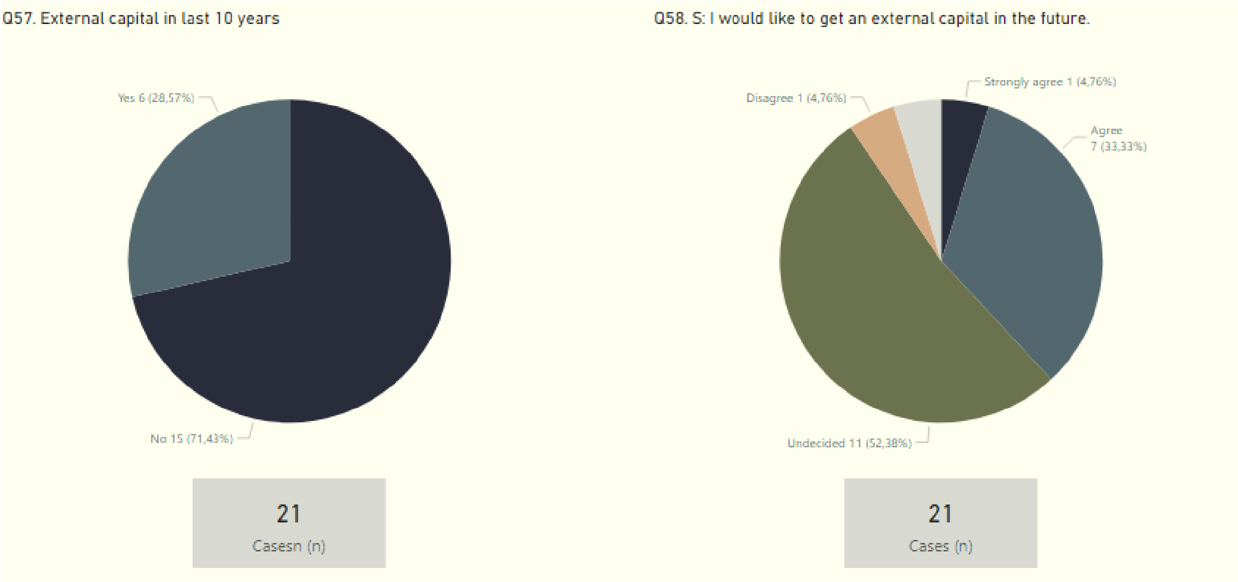


Figure 29 (Poland) Financial situation, attitude towards a statement



6.5.4. Marketing activities

Figure 30 (Poland) Currently used marketing activities

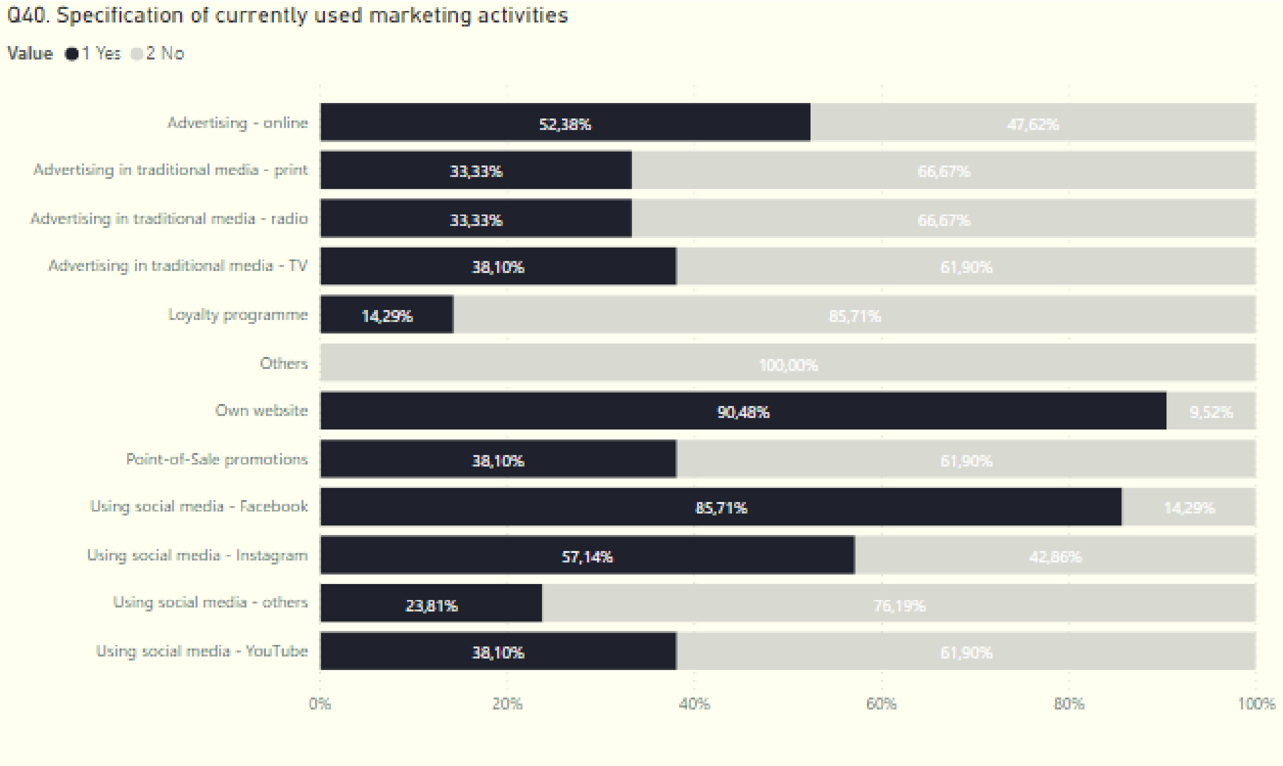


Figure 31 (Poland) Marketing activities planned for the future

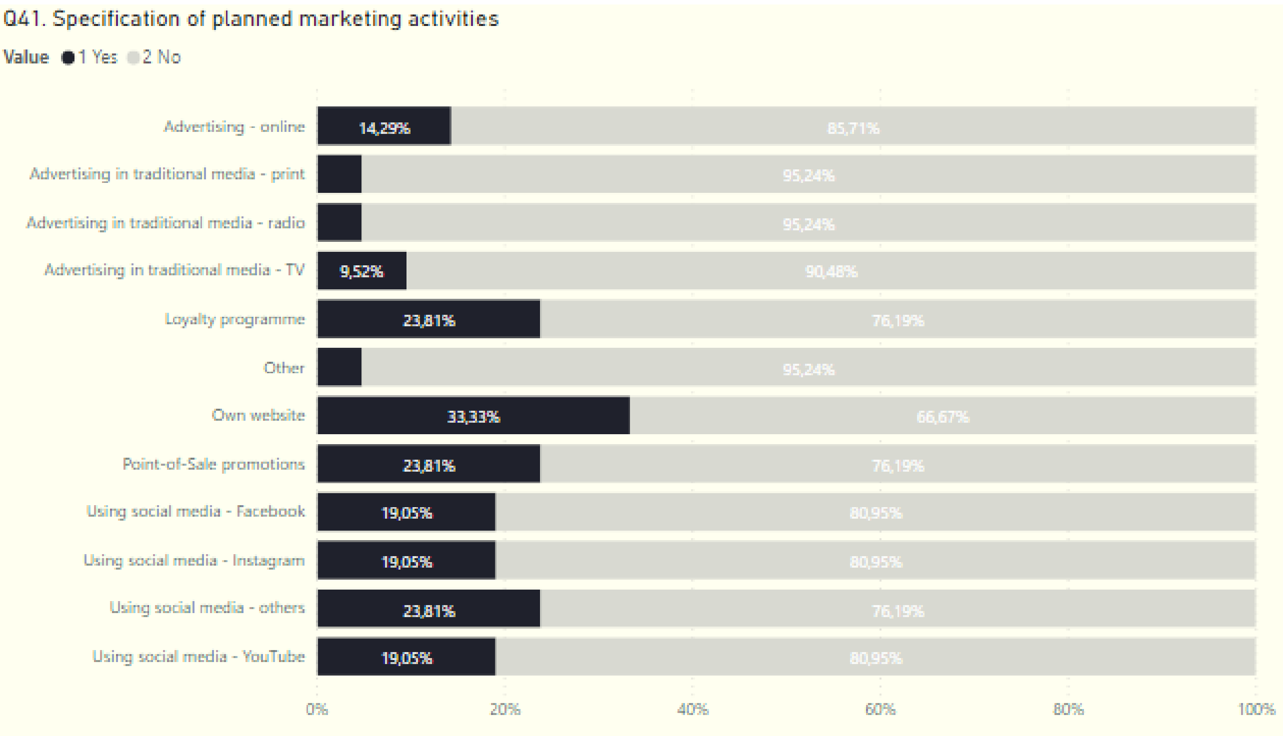


Figure 32 (Poland) Responsibility for marketing activities

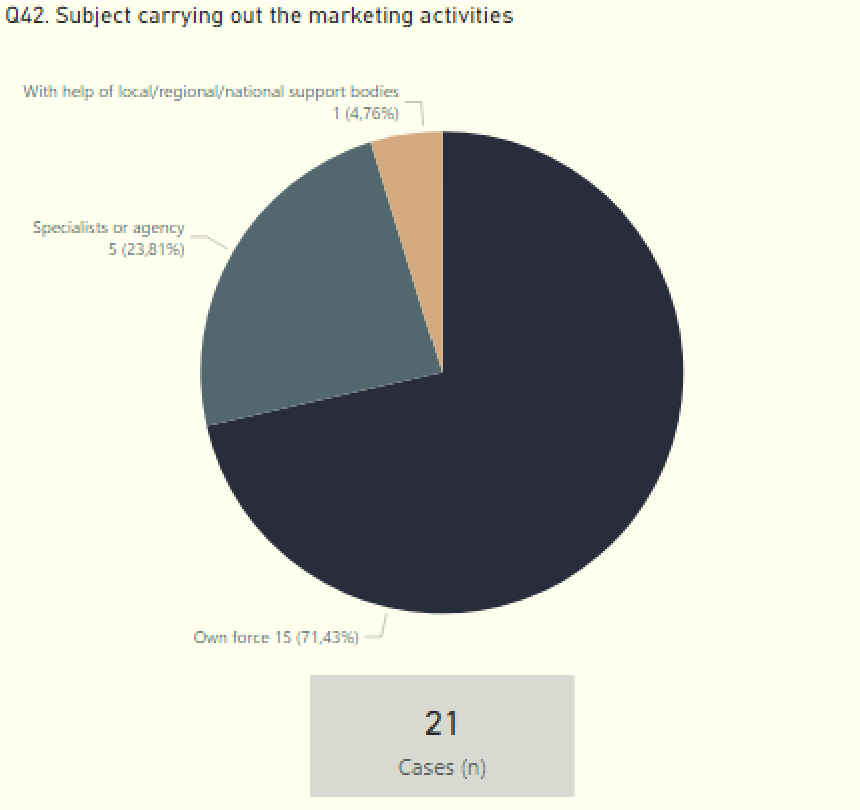


Figure 33 (Poland) Participating in the marketing activities

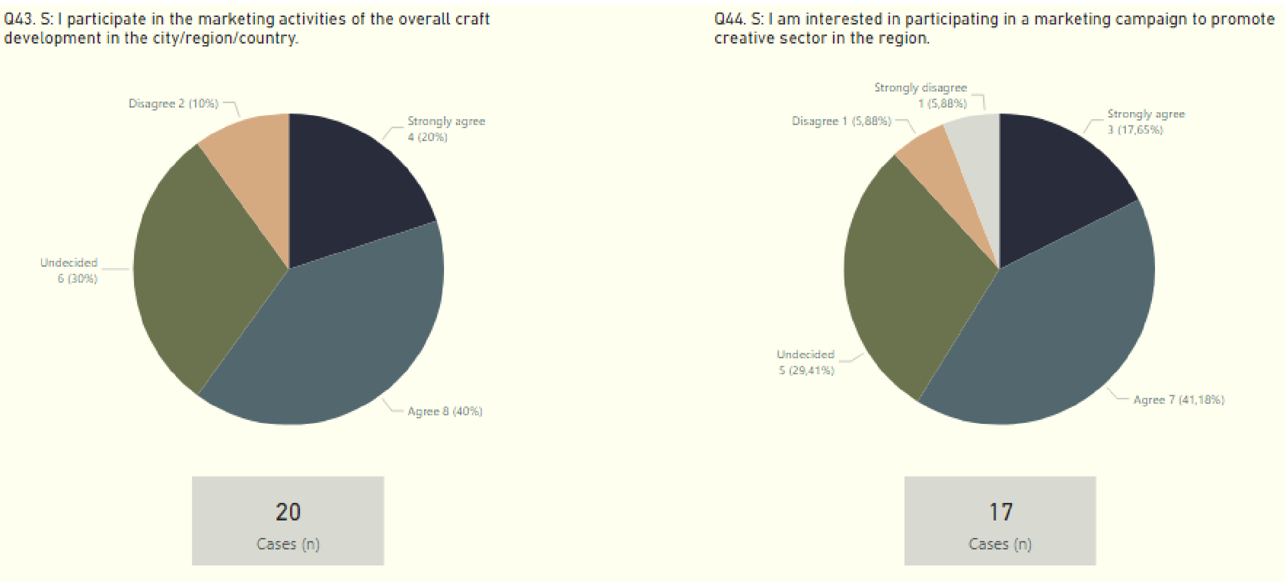


Figure 34 (Poland) Marketing activities on social networks

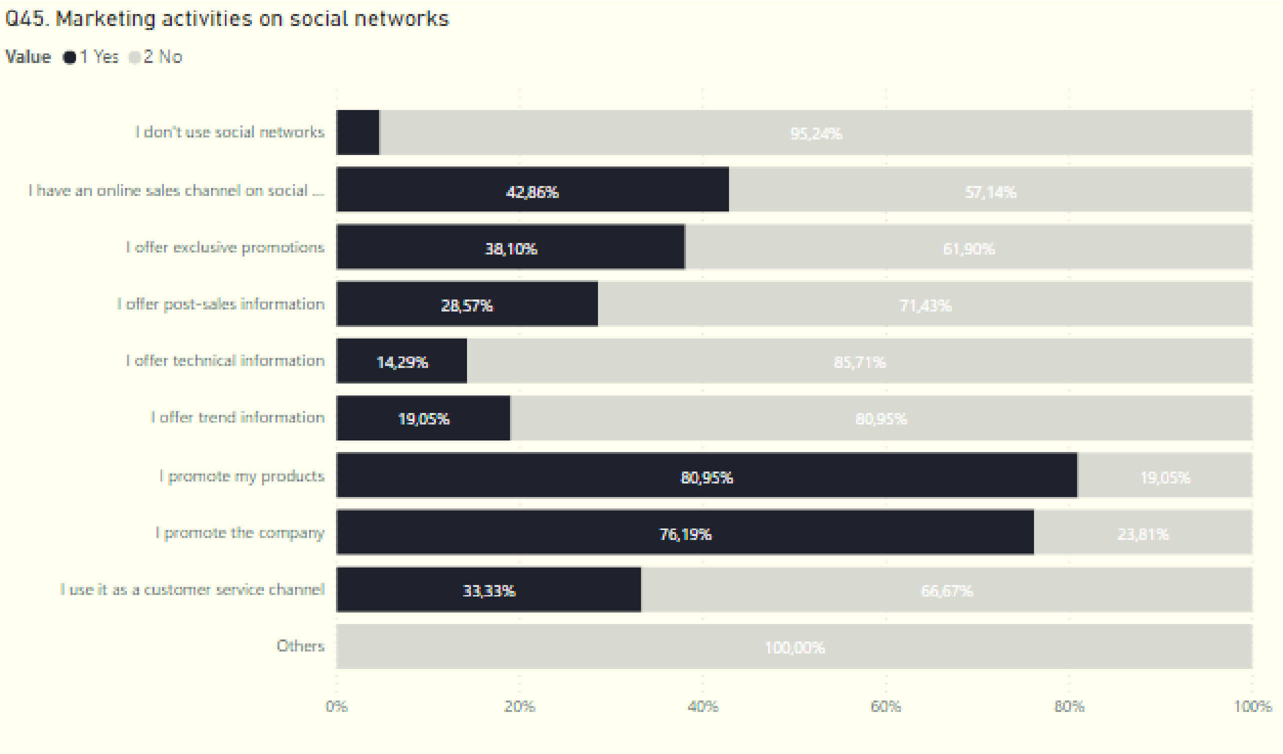


Figure 35 (Poland) Feedback on social media

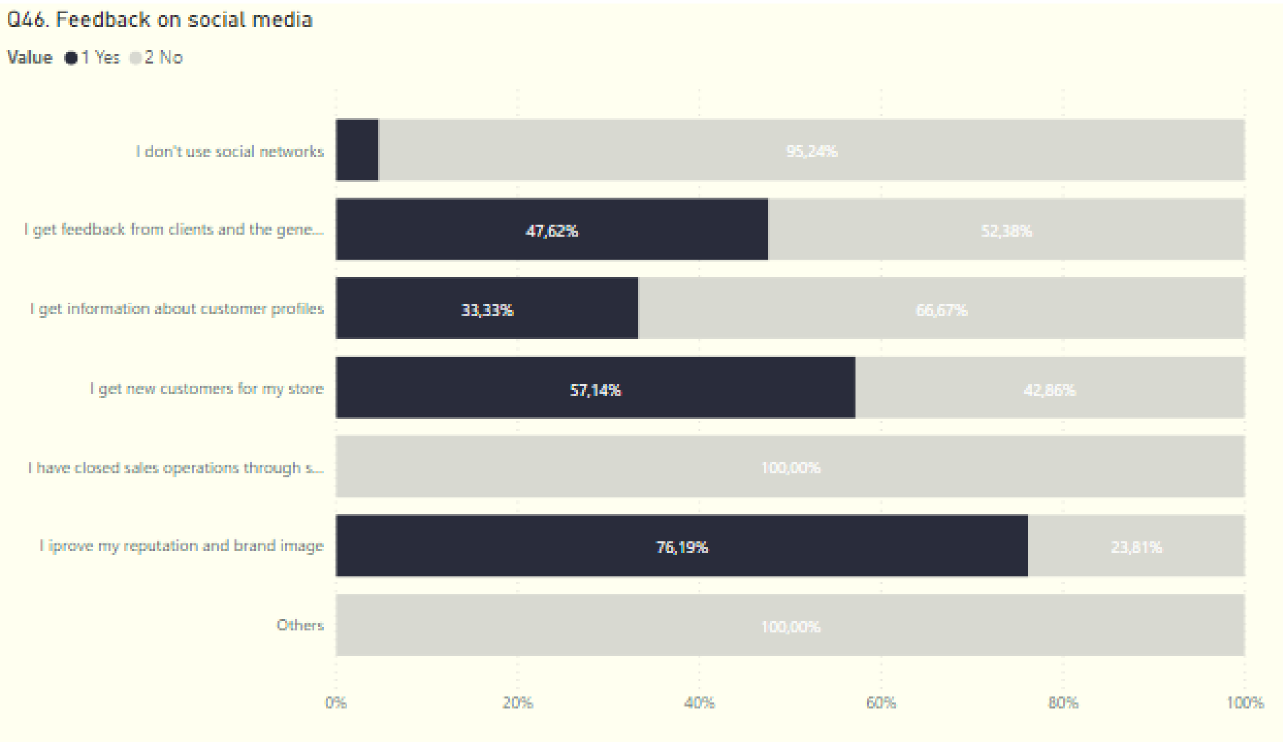


Figure 36 (Poland) Currently used distribution channels

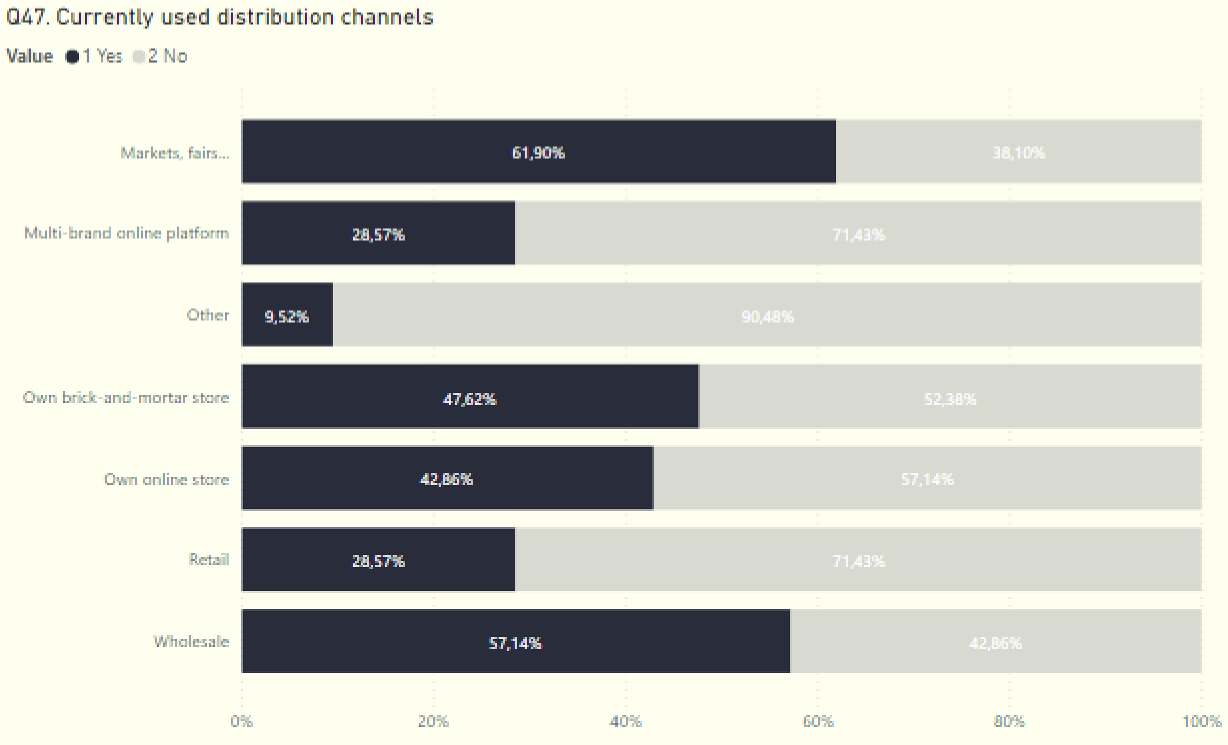
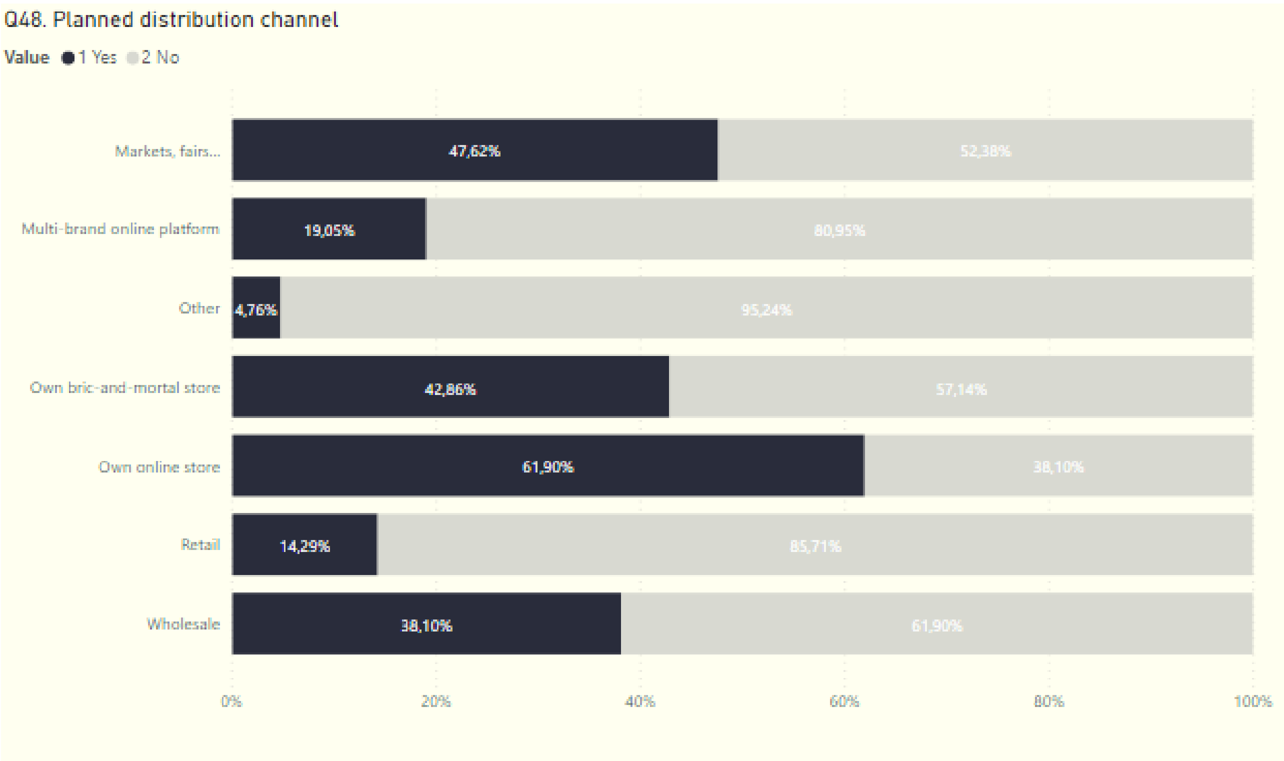


Figure 37 (Poland) Planned distribution channels



6.6. Annexes Slovenia

6.6.1. Businesses as existing entrepreneurial capacities – graphical overview

Figure 1 (Slovenia) Sample – Legal form of respondents

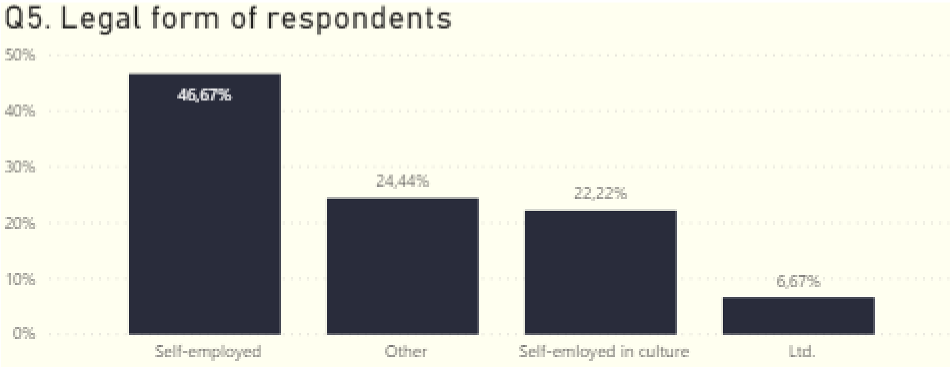


Figure 2 (Slovenia) Sample – Length of managing business

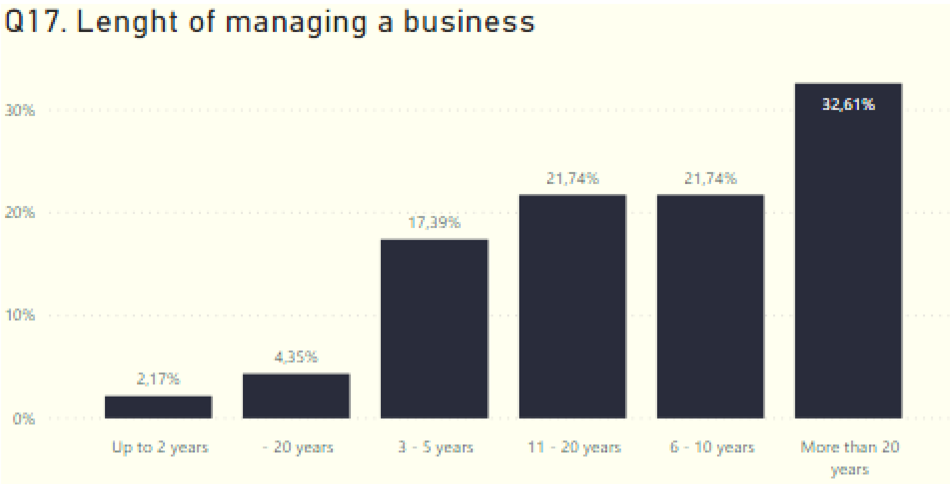


Figure 3 (Slovenia) Situation in ceramic sector

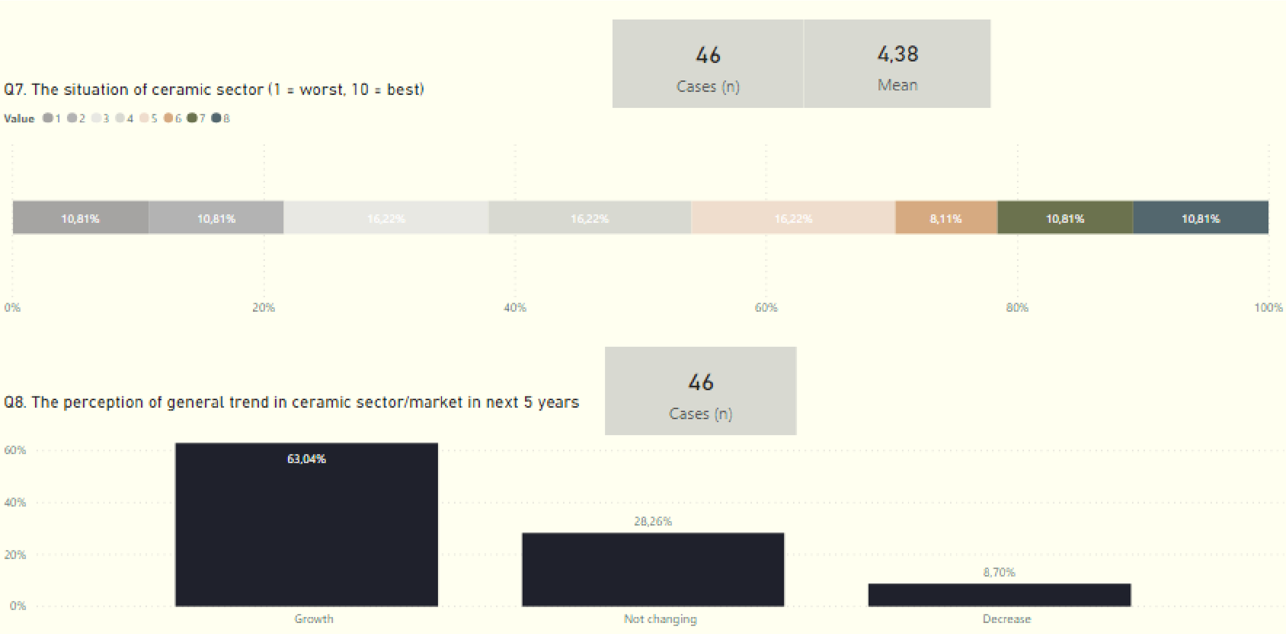


Figure 4 (Slovenia) Level of cooperation

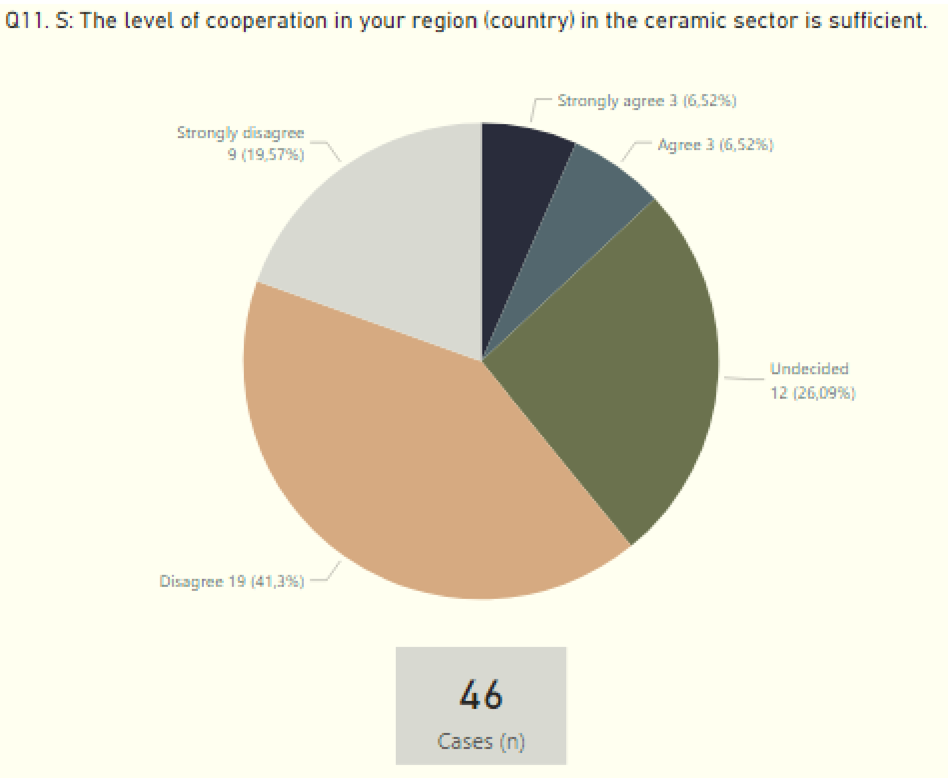


Figure 5 (Slovenia) Membership in an association

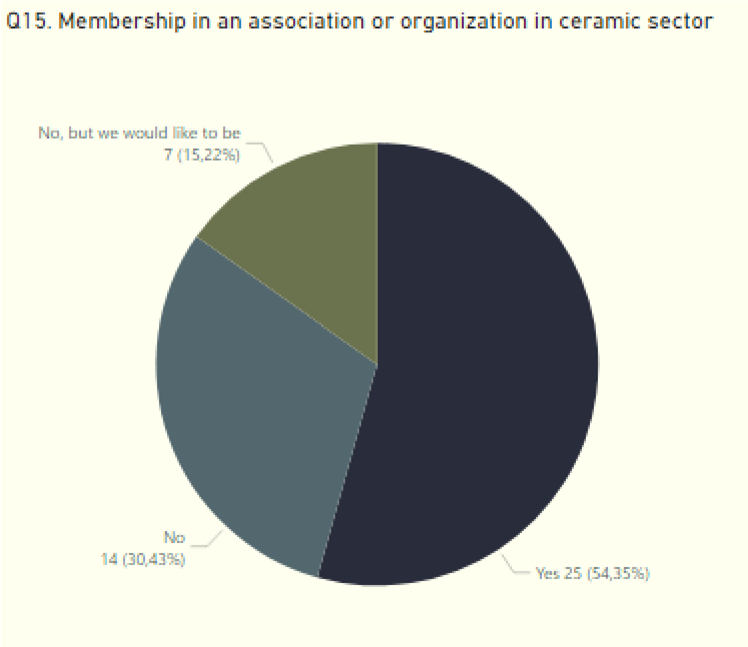


Figure 6 (Slovenia) Membership in an association

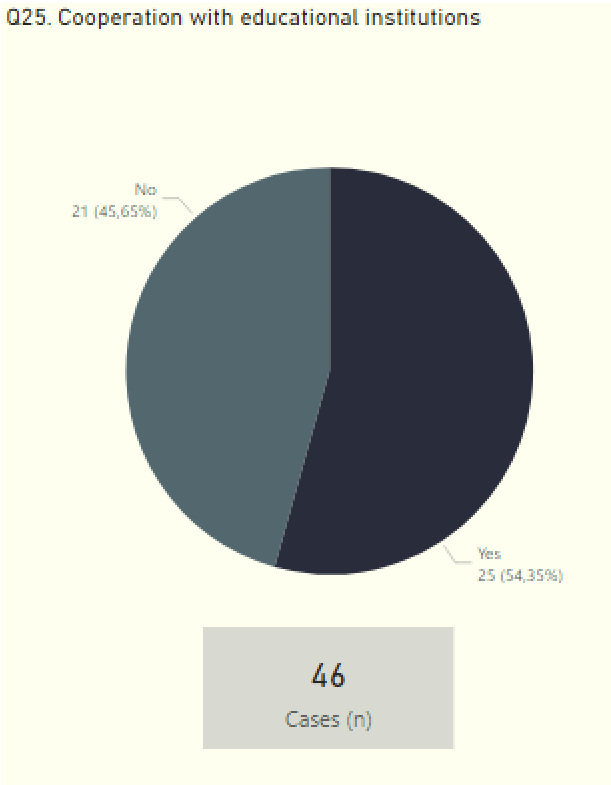


Figure 7 (Slovenia) Employee and self-training

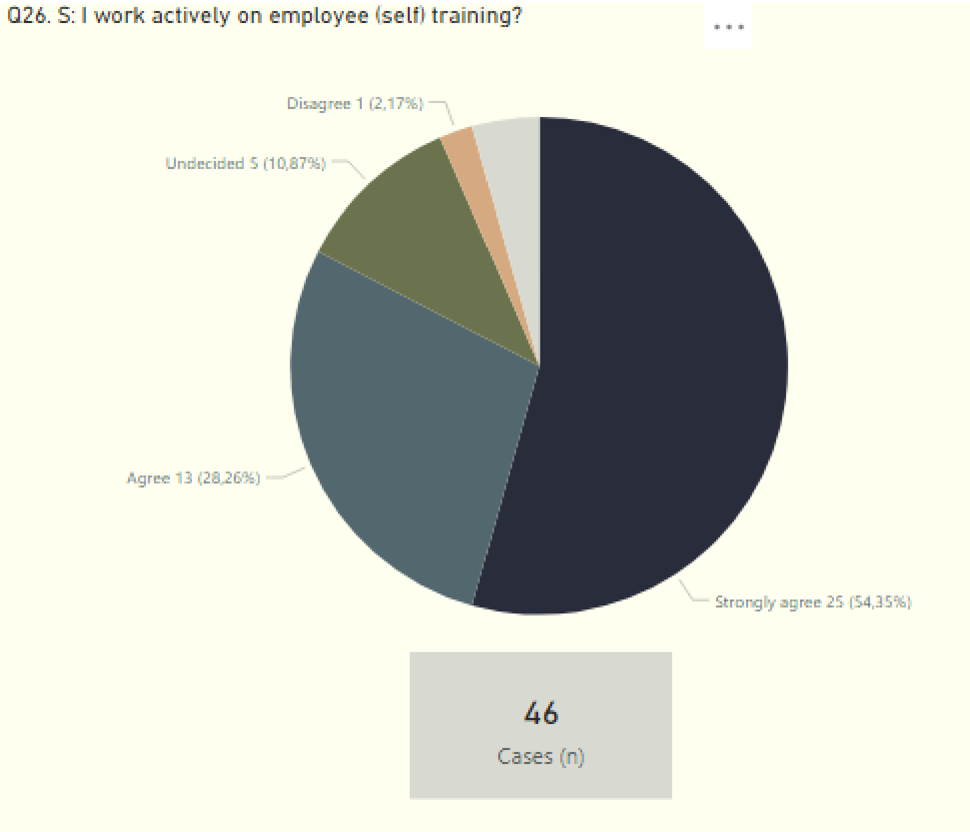


Figure 8 (Slovenia) Further education and training topics (craft and design skills)

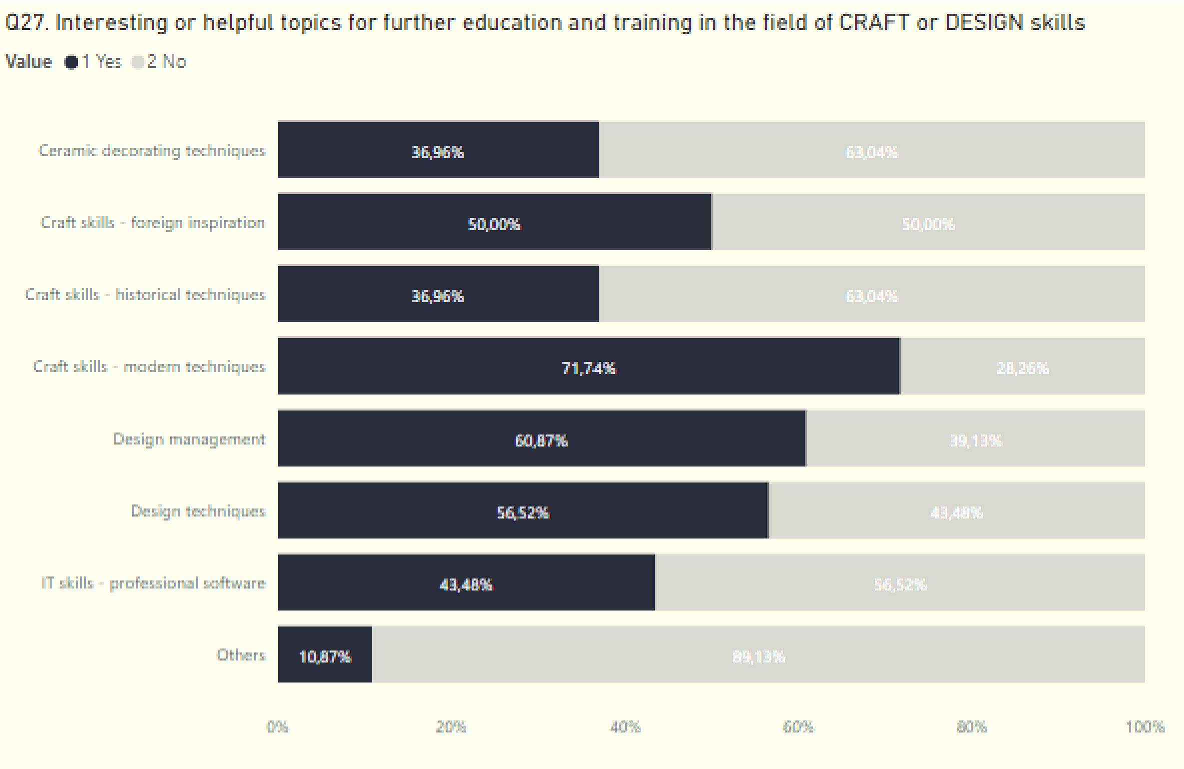


Figure 9 (Slovenia) Further education and training topics (management, marketing, and business skills)

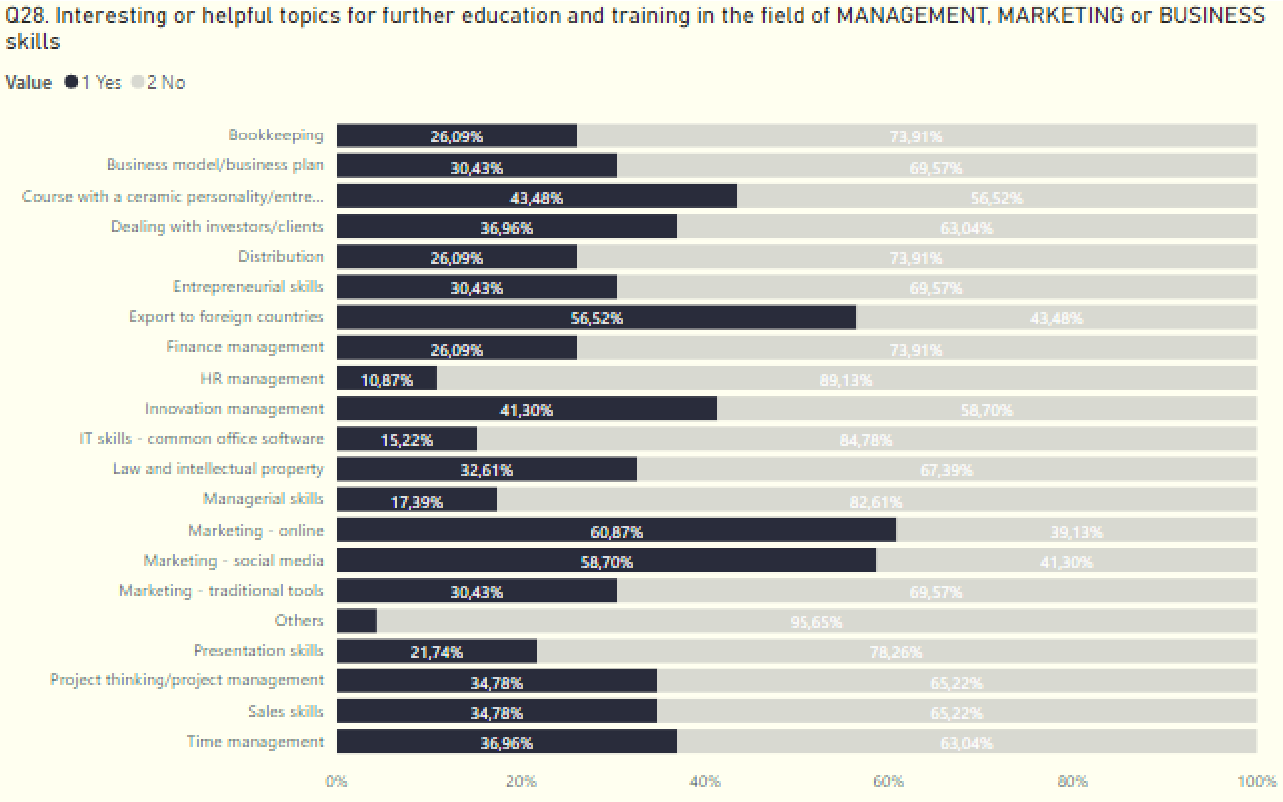


Figure 10 (Slovenia) Participating in marketing activities in the city/region/country

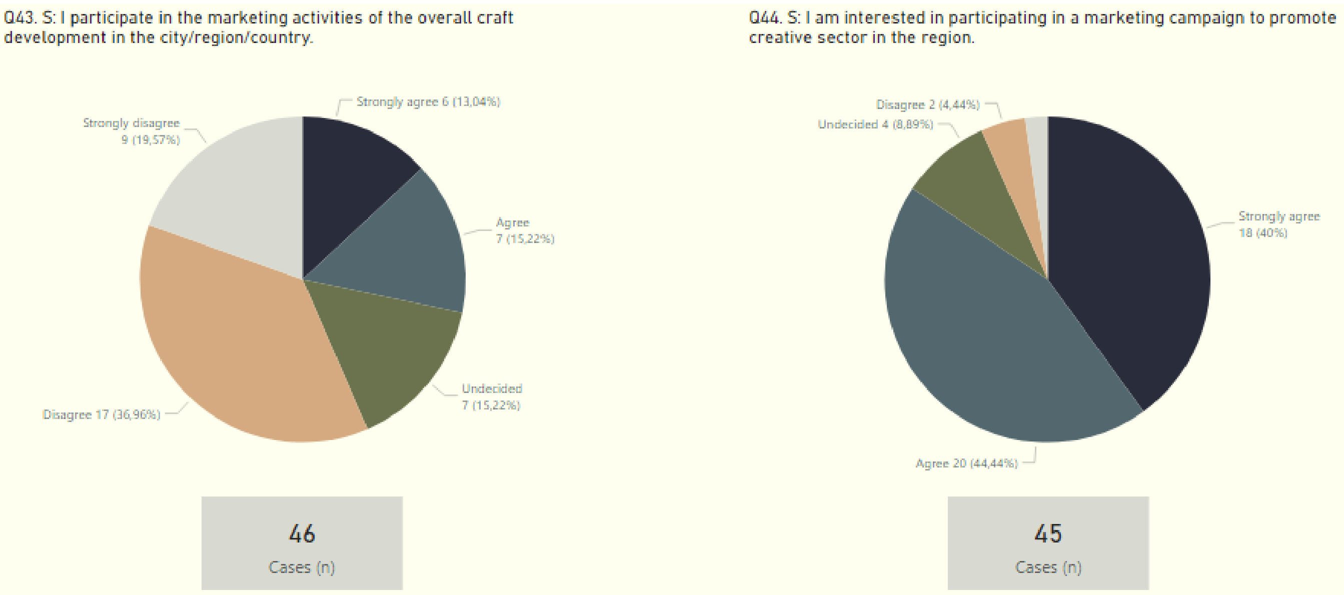


Figure 11 (Slovenia) A need of international portal about ceramics

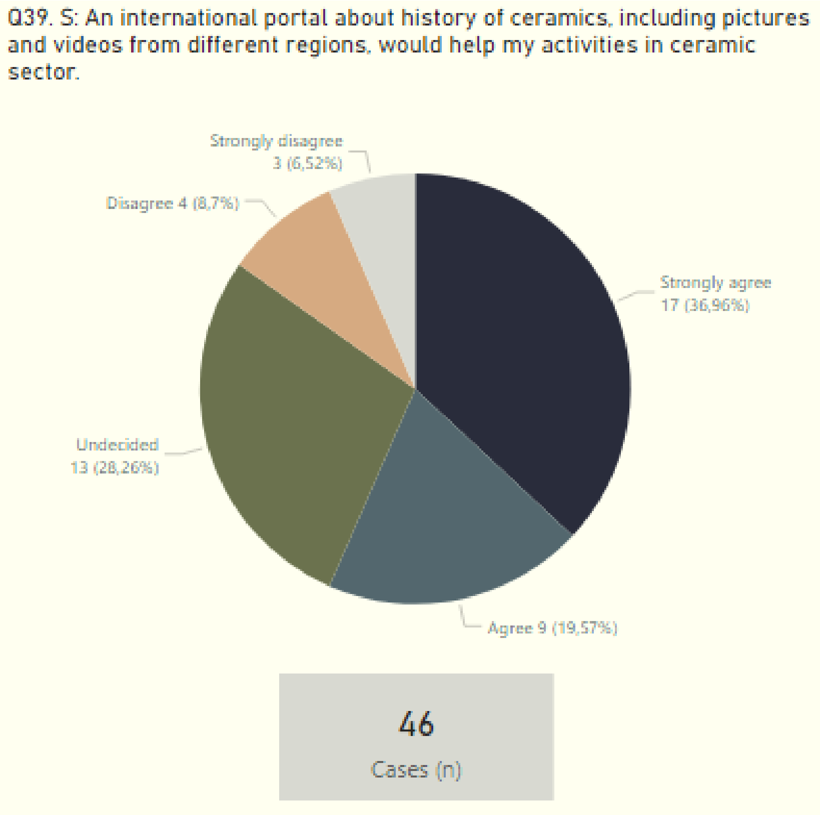
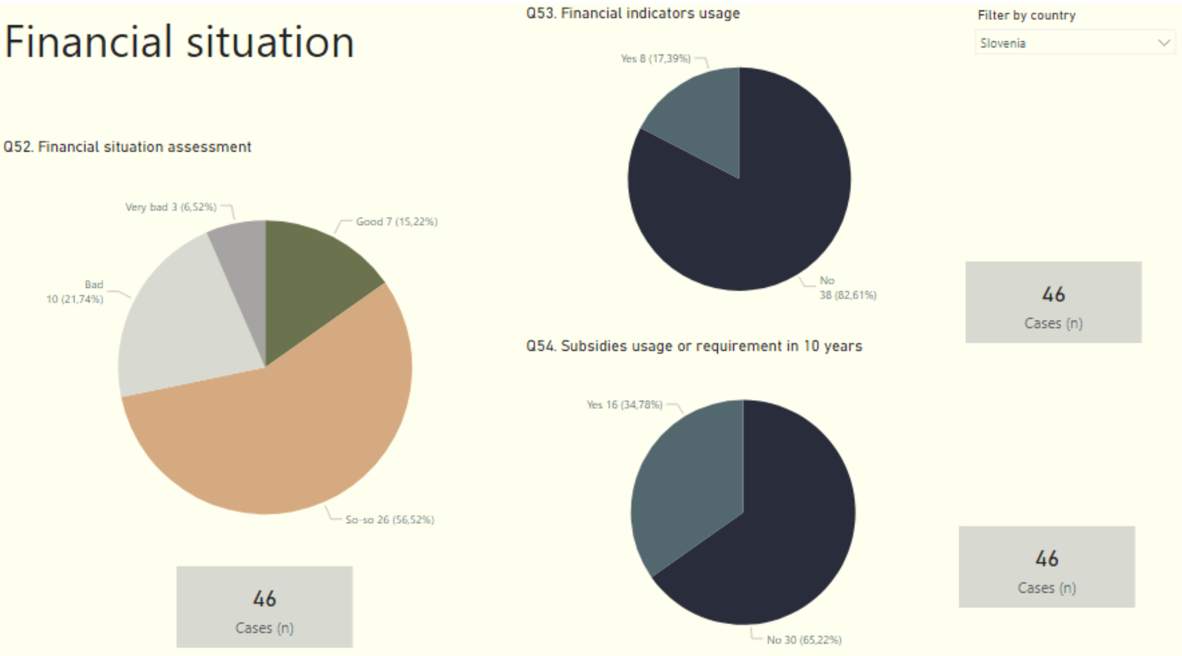


Figure 12 (Slovenia) Financial situation



6.6.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (Slovenia) Sample – students

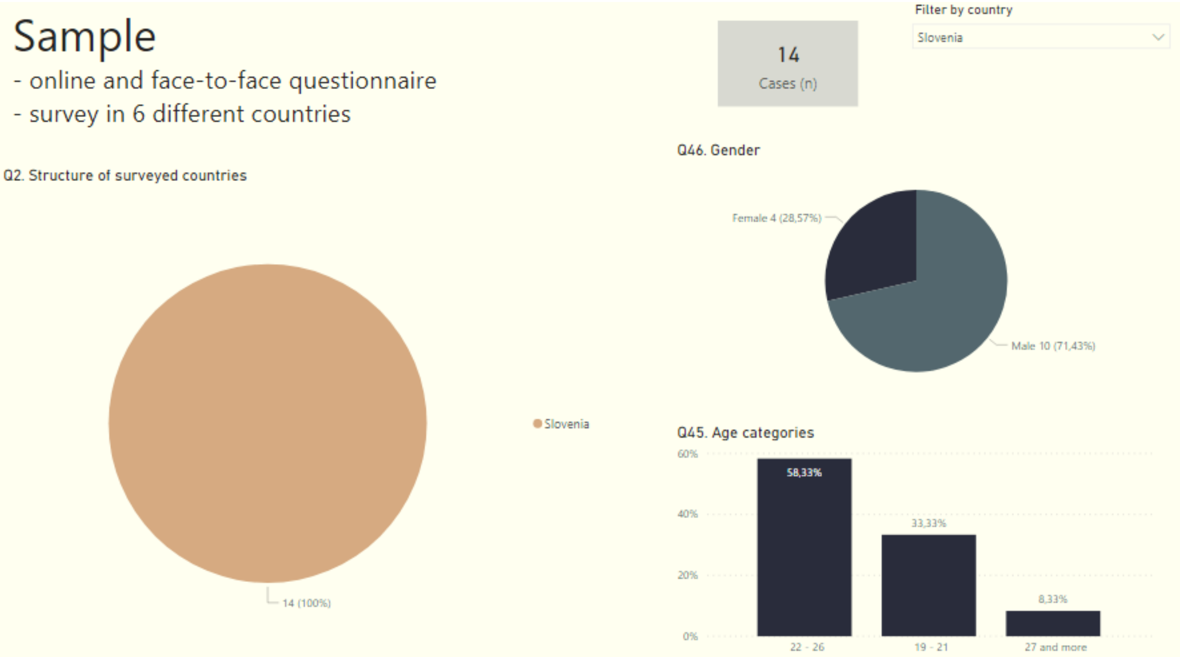


Figure 14 (Slovenia) Study direction of students

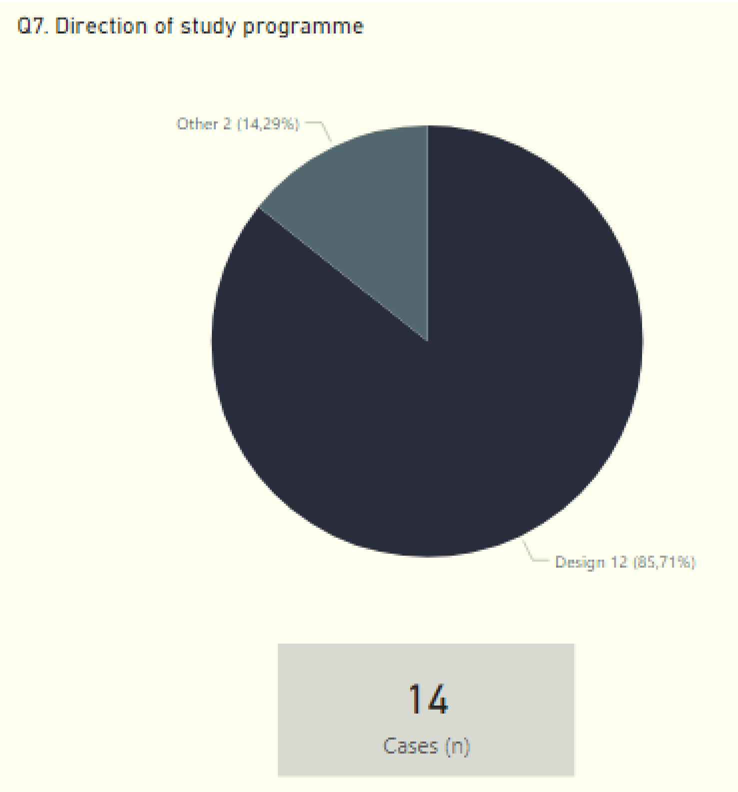


Figure 15 (Slovenia) Future direction of students

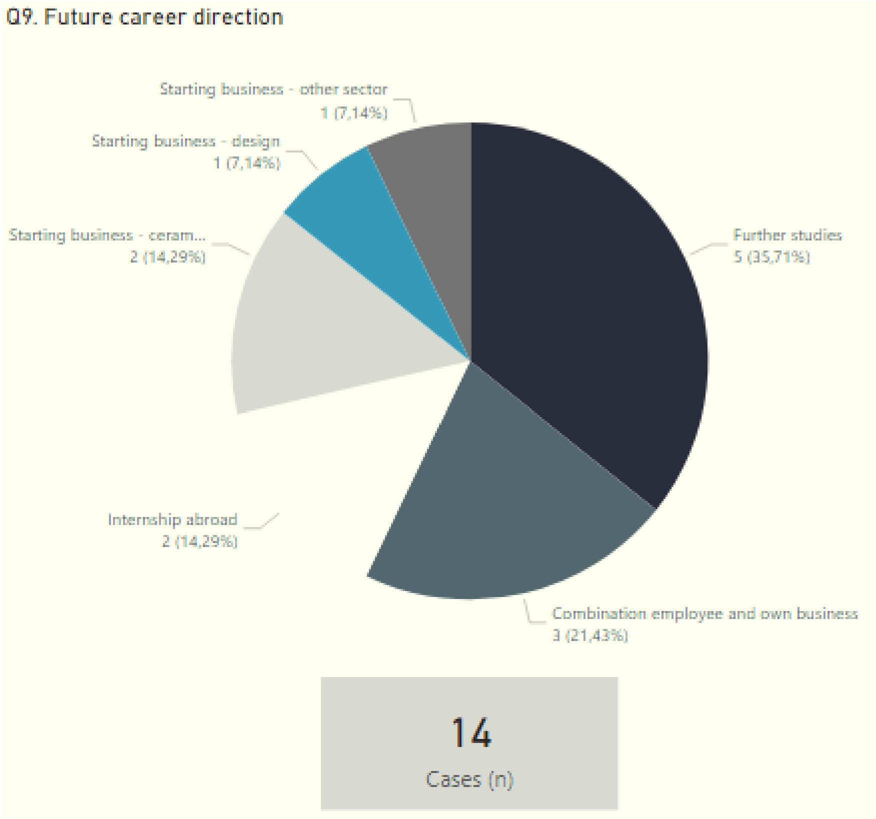
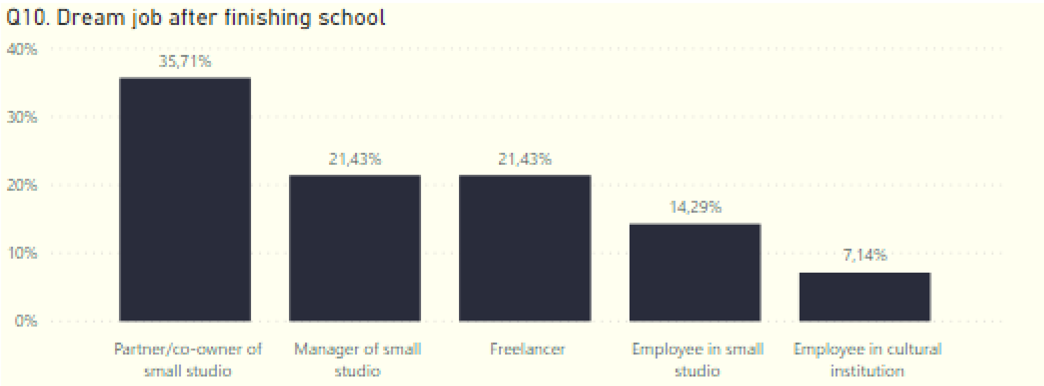


Figure 16 (Slovenia) Dream job



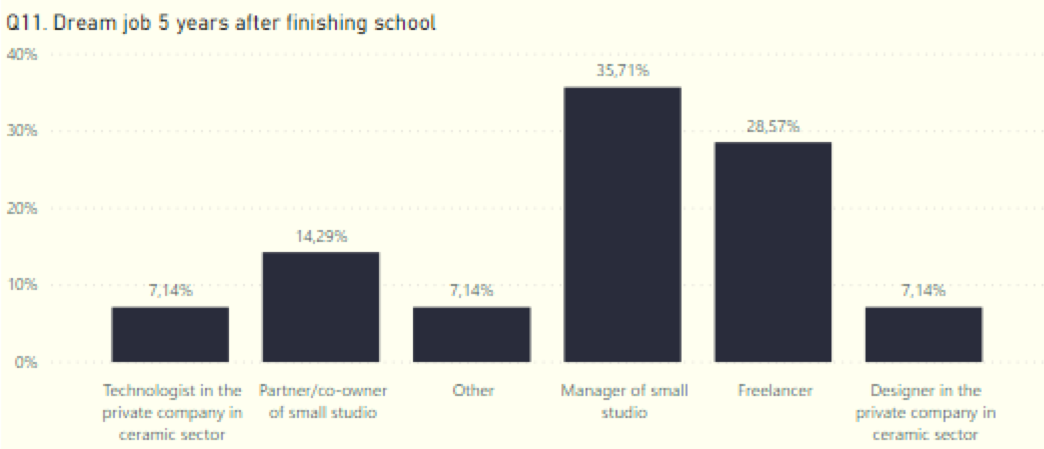


Figure 17 (Slovenia) Important students' knowledge/skills gained

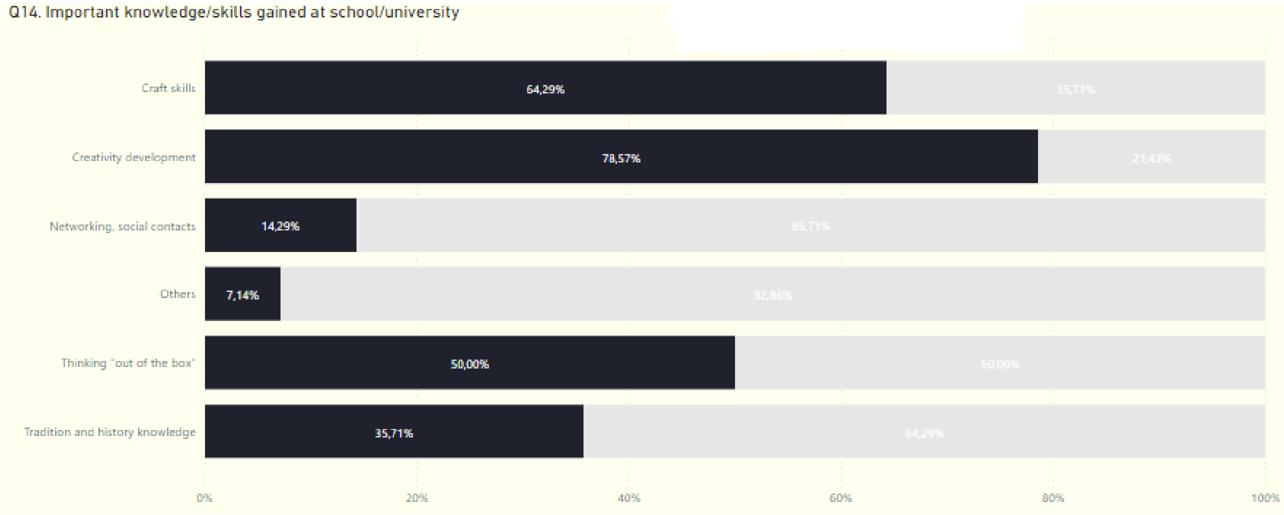


Figure 18 (Slovenia) Lack in students' knowledge

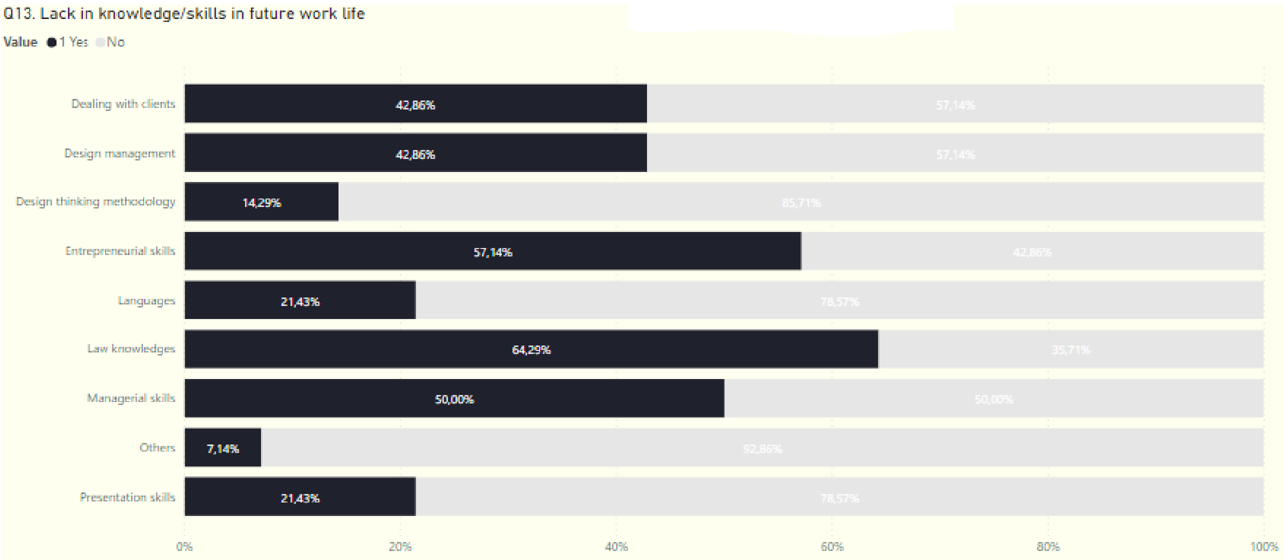


Figure 19 (Slovenia) Help with starting own business of finding a job

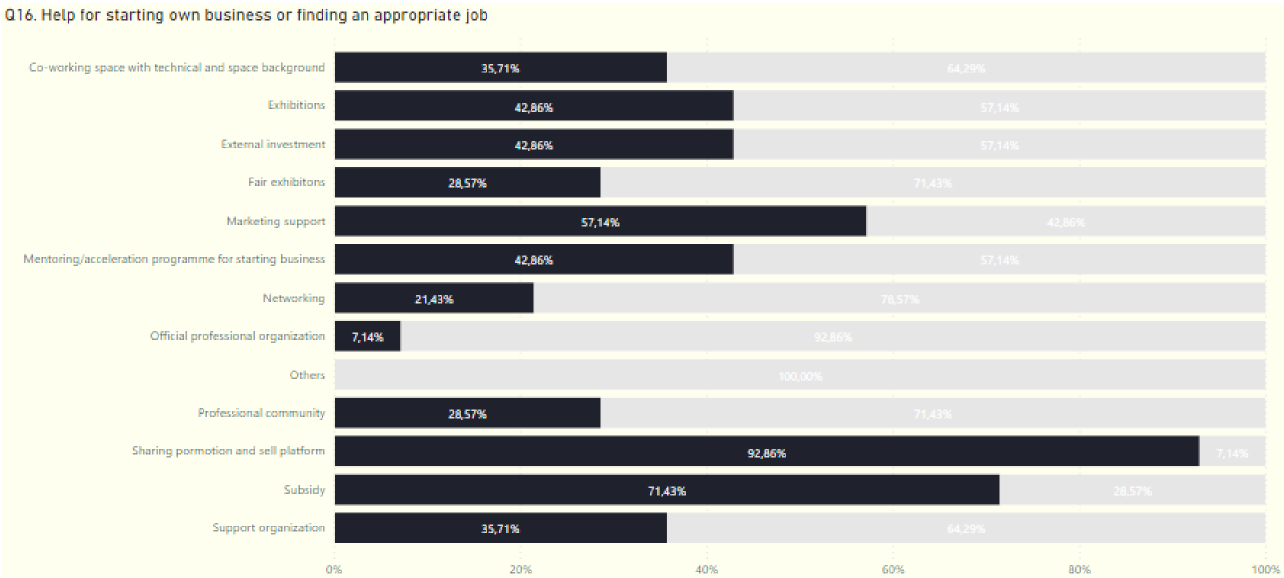
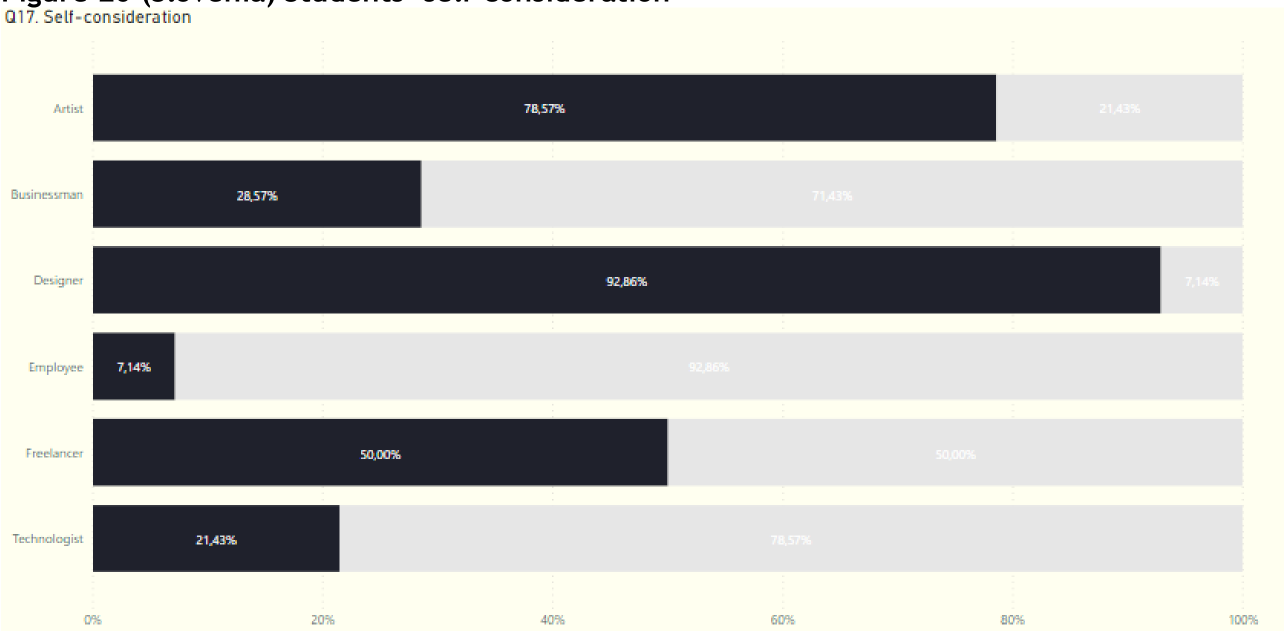


Figure 20 (Slovenia) Students' self-consideration



6.6.3. Expectations and needs of stakeholders

Figure 21 (Slovenia) Situation in ceramic sector

Figure 22 (Slovenia) Intensity of current cooperation

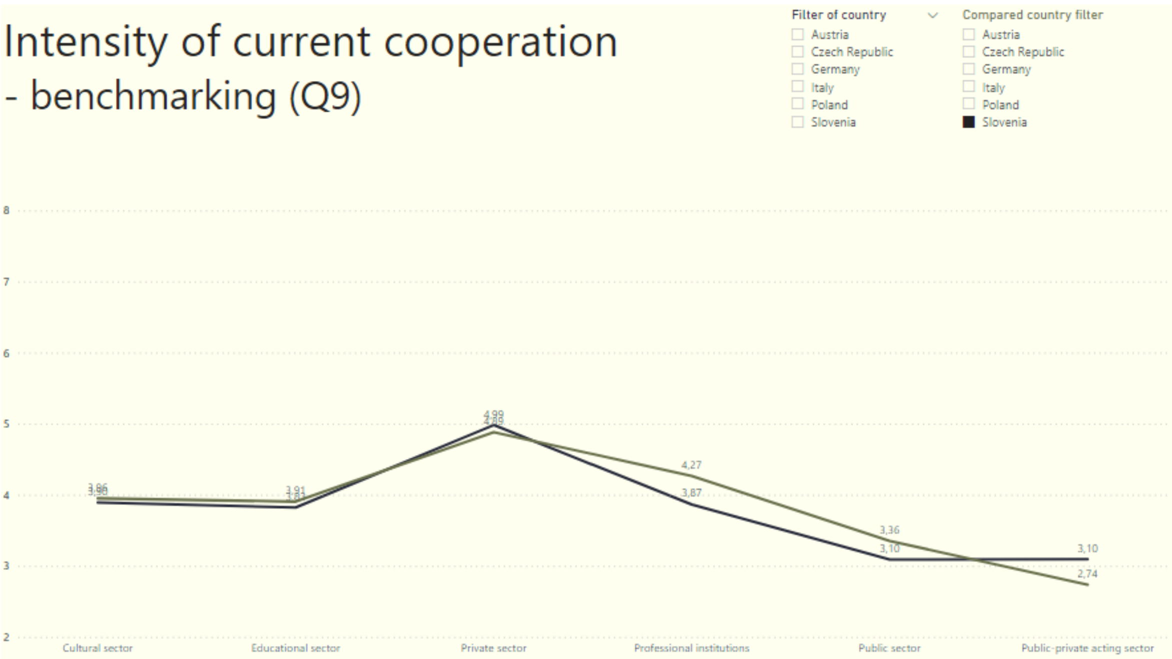


Figure 23 (Slovenia) Importance of cooperation

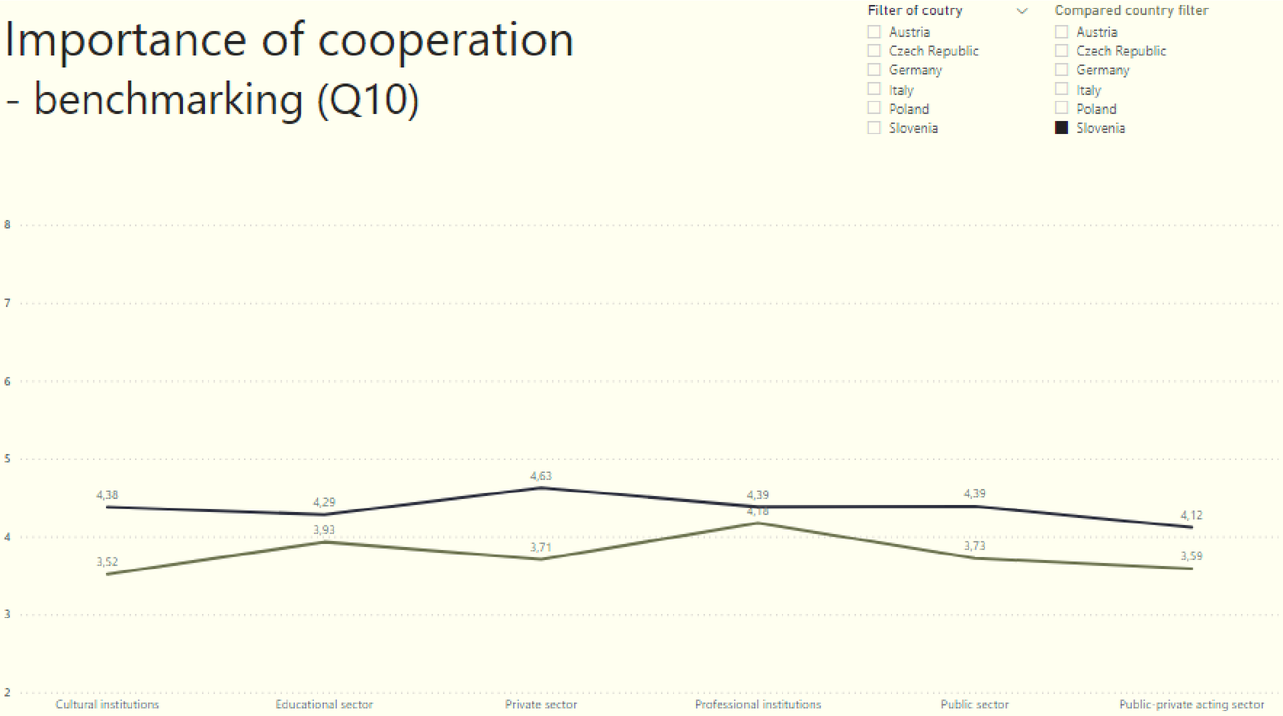


Figure 24 (Slovenia) Influence level

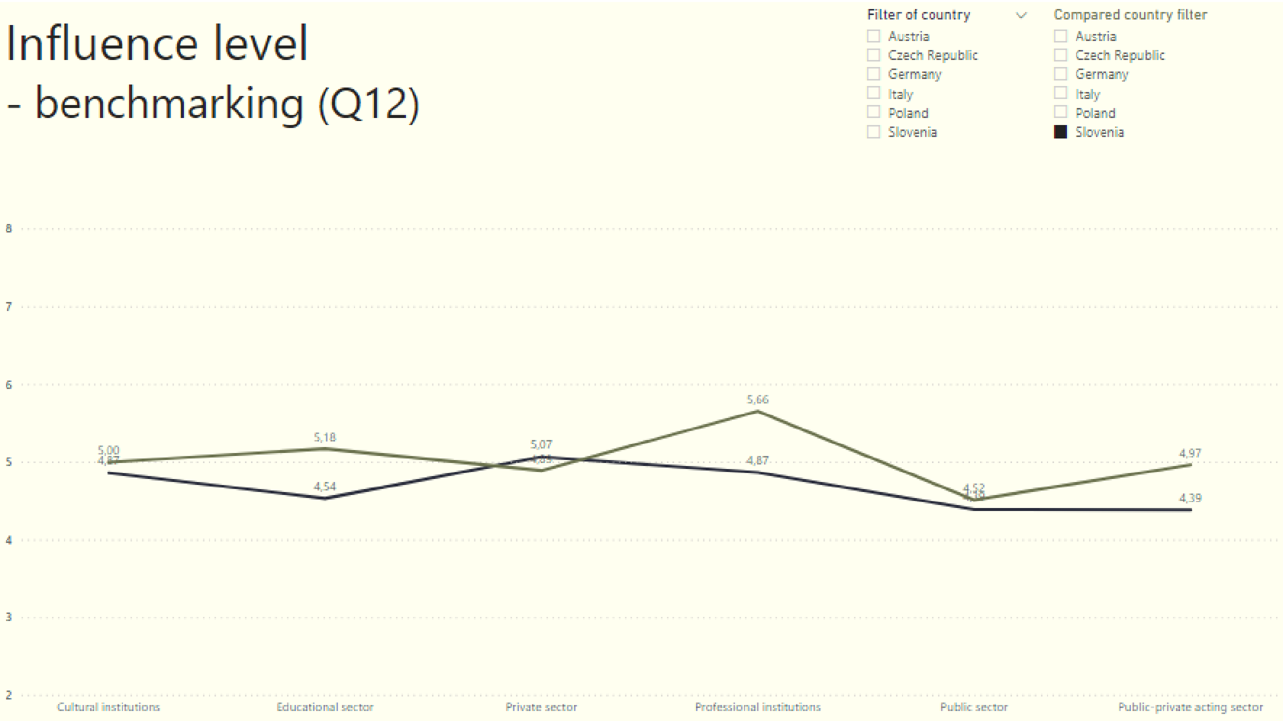
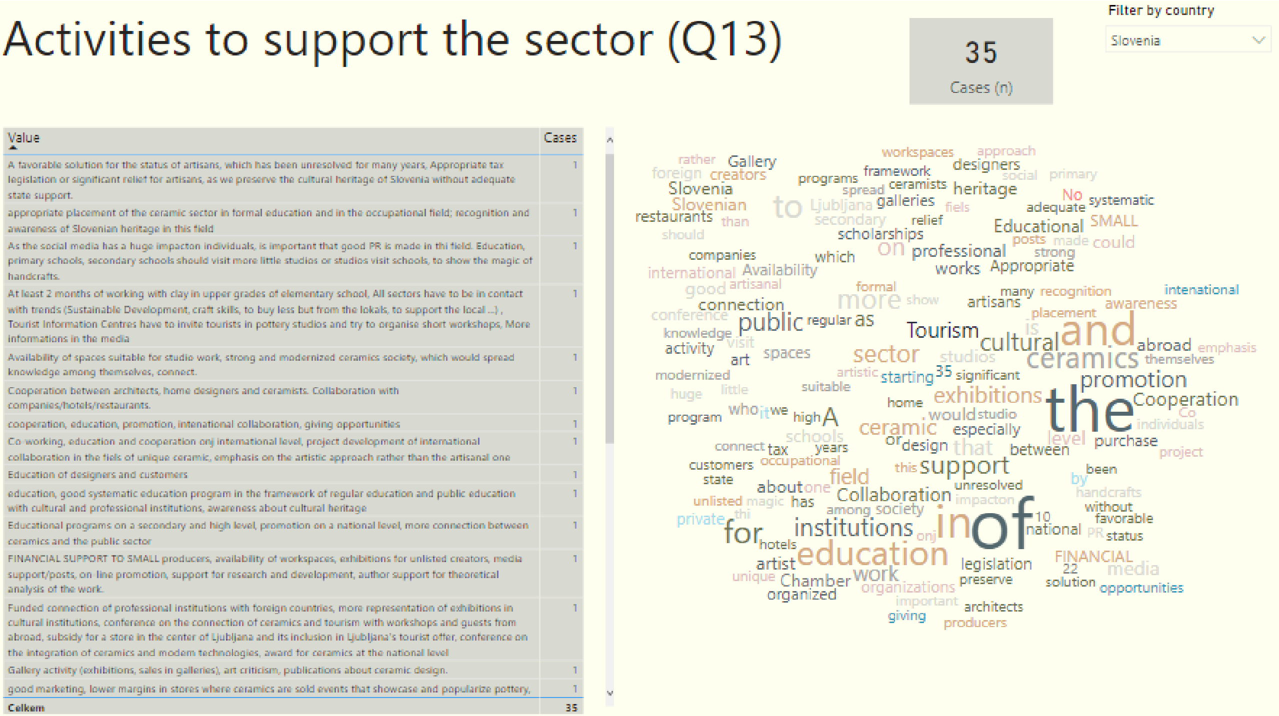


Figure 25 (Slovenia) Activities to support the sector



Value	Cases
A favorable solution for the status of artisans, which has been unresolved for many years, Appropriate tax legislation or significant relief for artisans, as we preserve the cultural heritage of Slovenia without adequate state support.	1
appropriate placement of the ceramic sector in formal education and in the occupational field; recognition and awareness of Slovenian heritage in this field	1
As the social media has a huge impacton individuals, is important that good PR is made in thi field. Education, primary schools, secondary schools should visit more little studios or studios visit schools, to show the magic of handcrafts.	1
At least 2 months of working with clay in upper grades of elementary school, All sectors have to be in contact with trends (Sustainable Development, craft skills, to buy less but from the lokals, to support the local ...) , Tourist Information Centres have to invite tourists in pottery studios and try to organise short workshops, More informations in the media	1
Availability of spaces suitable for studio work, strong and modernized ceramics society, which would spread knowledge among themselves, connect.	1
Cooperation between architects, home designers and ceramists. Collaboration with companies/hotels/restaurants.	1
cooperation, education, promotion, intenational collaboration, giving opportunities	1
Co working, education and cooperation onj international level, project development of international collaboration in the fiels of unique ceramic, emphasis on the artistic approach rather than the artisanal one	1
Education of designers and customers	1
education, good systematic education program in the framework of regular education and public education with cultural and professional institutions, awareness about cultural heritage	1
Educational programs on a secondary and high level, promotion on a national level, more connection between ceramics and the public sector	1
FINANCIAL SUPPORT TO SMALL producers, availability of workspaces, exhibitions for unlisted creators, media support/posts, on-line promotion, support for research and development, author support for theoretical analysis of the work.	1
Funded connection of professional institutions with foreign countries, more representation of exhibitions in cultural institutions, conference on the connection of ceramics and tourism with workshops and guests from abroad, subsidy for a store in the center of Ljubljana and its inclusion in Ljubljana's tourist offer, conference on the integration of ceramics and modern technologies, award for ceramics at the national level	1
Gallery activity (exhibitions, sales in galleries), art criticism, publications about ceramic design.	1
good marketing, lower margins in stores where ceramics are sold events that showcase and popularize pottery,	1
Celkem	**35**

Figure 26 (Slovenia) Level of cooperation

Q11. S: The level of cooperation in your region (country) in the ceramic sector is sufficient.

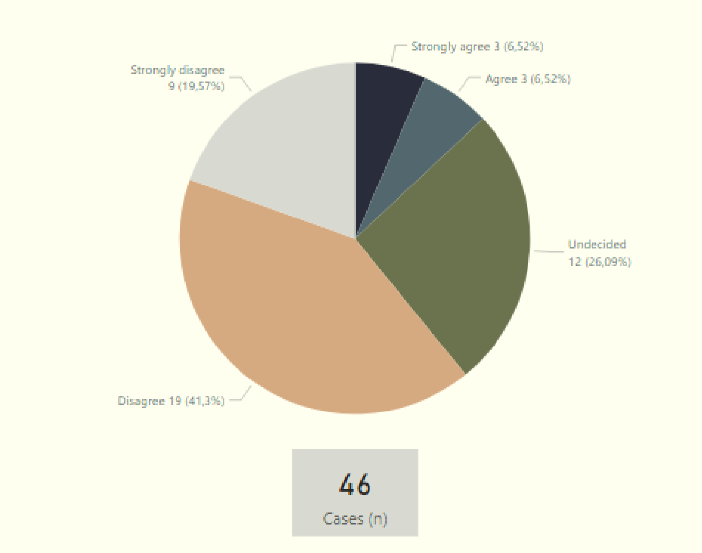


Figure 27 (Slovenia) Support or cooperation

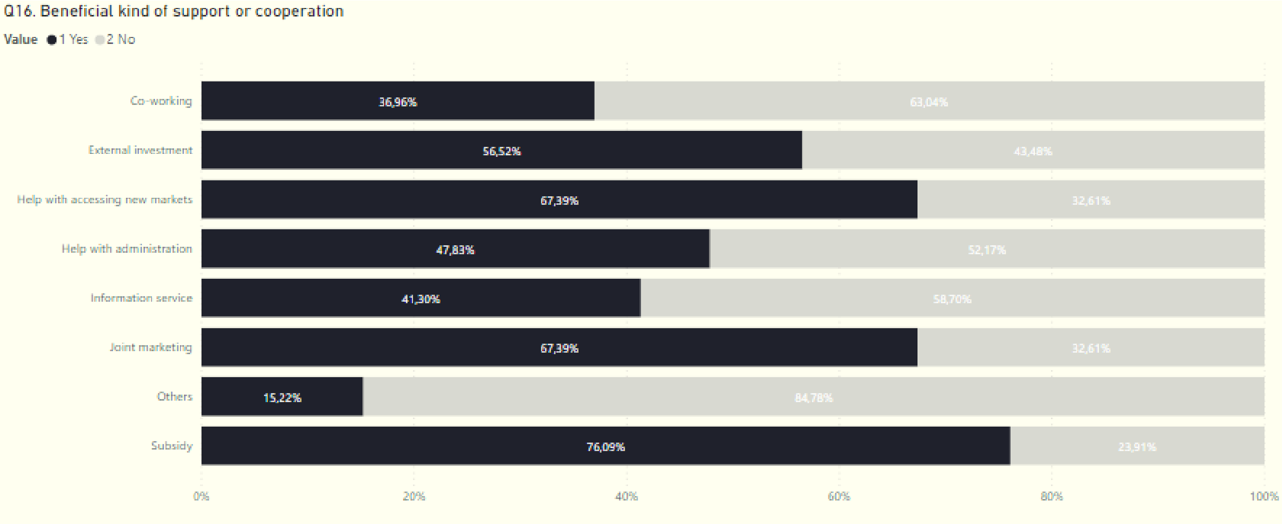


Figure 28 (Slovenia) Attitude towards a statement

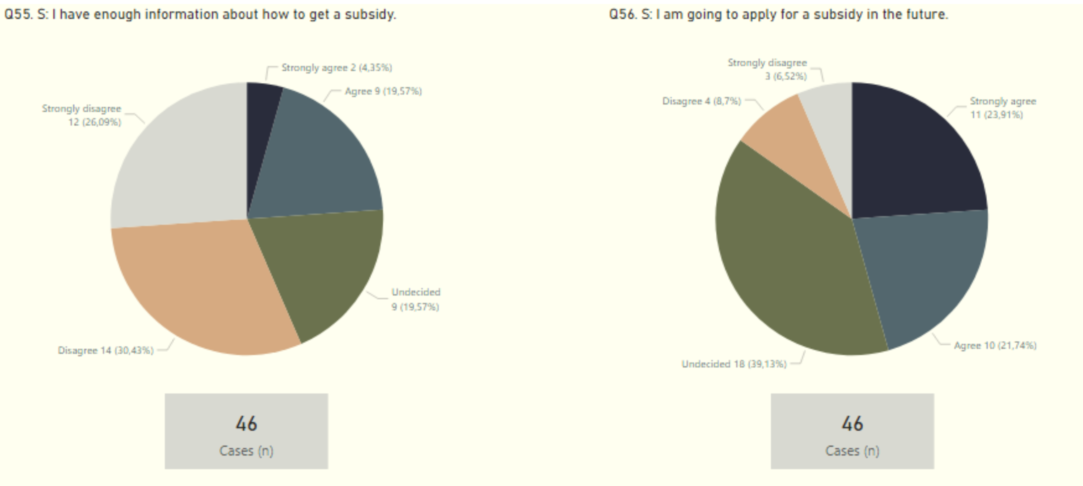
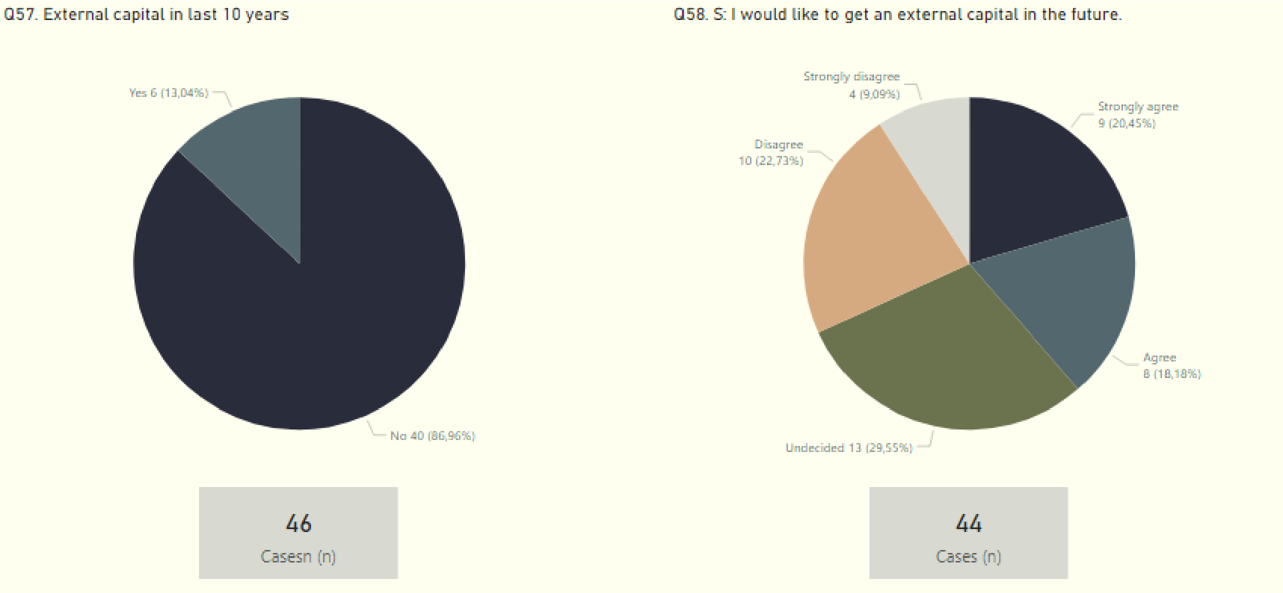


Figure 29 (Slovenia) Financial situation, attitude towards a statement



6.6.4. Marketing activities

Figure 30 (Slovenia) Currently used marketing activities

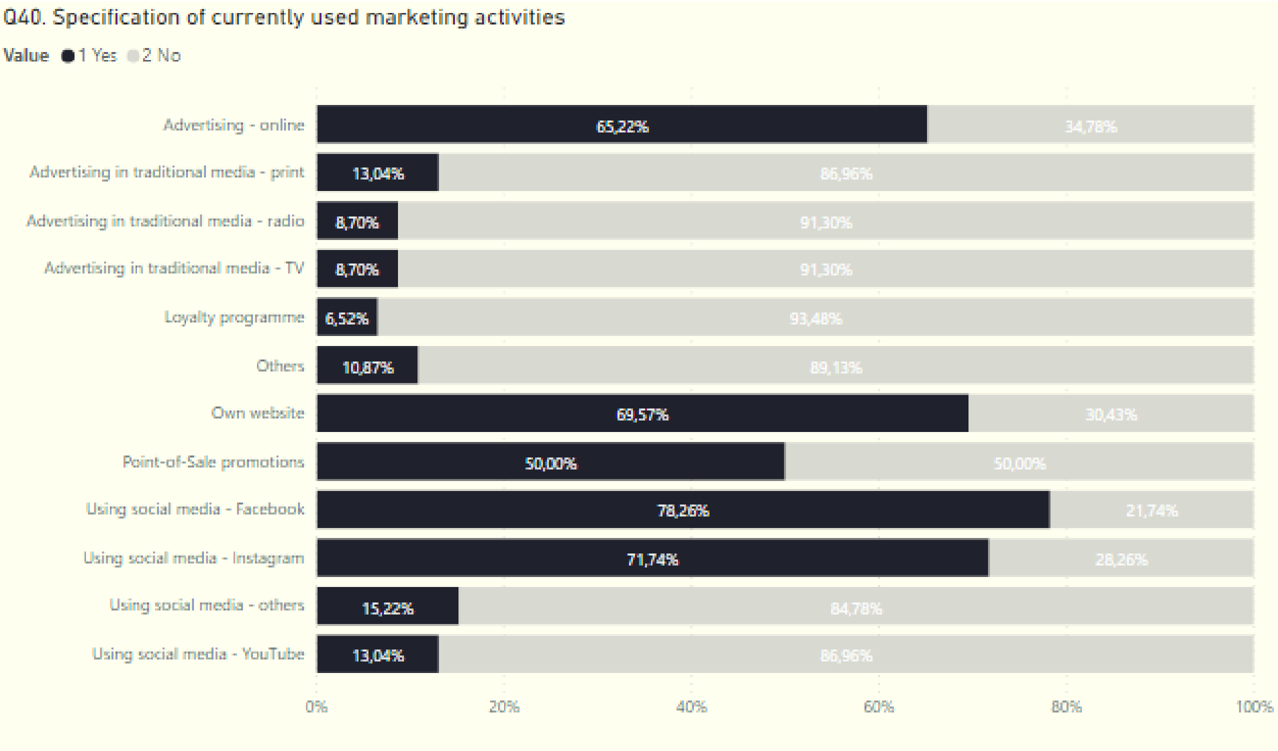


Figure 31 (Slovenia) Marketing activities planned for the future

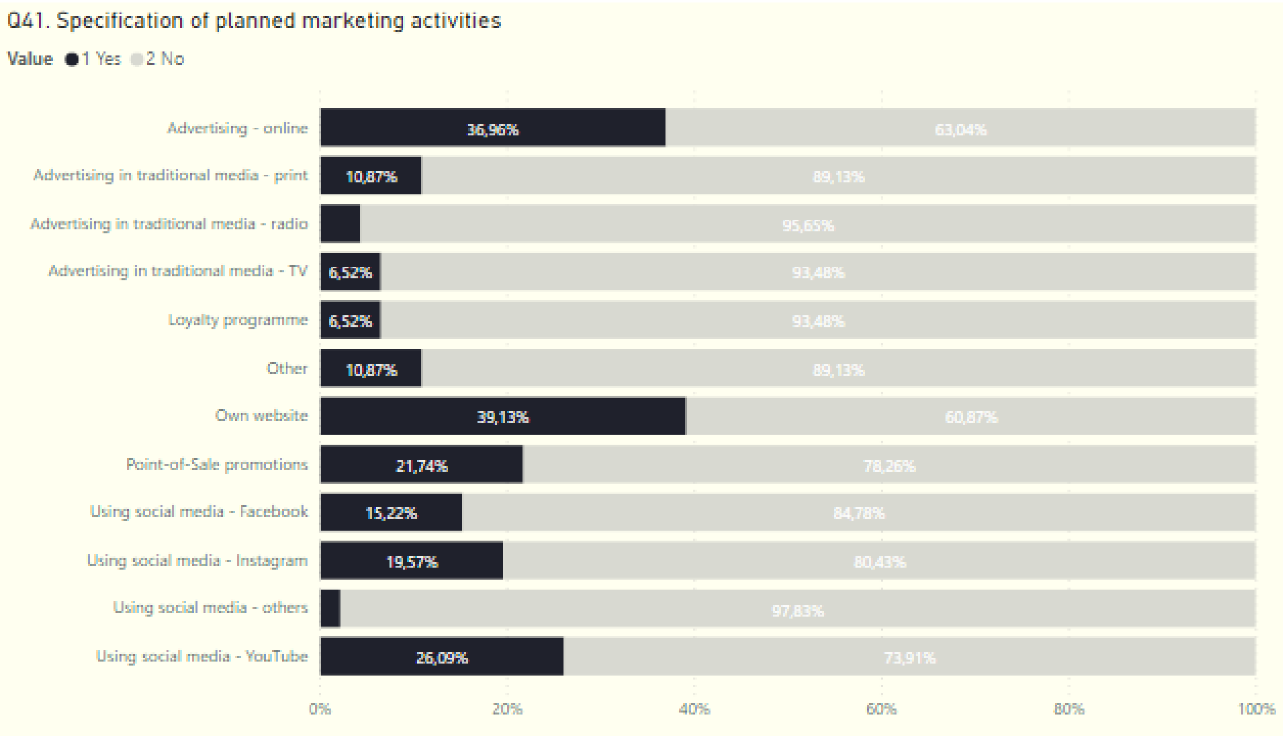


Figure 32 (Slovenia) Responsibility for marketing activities

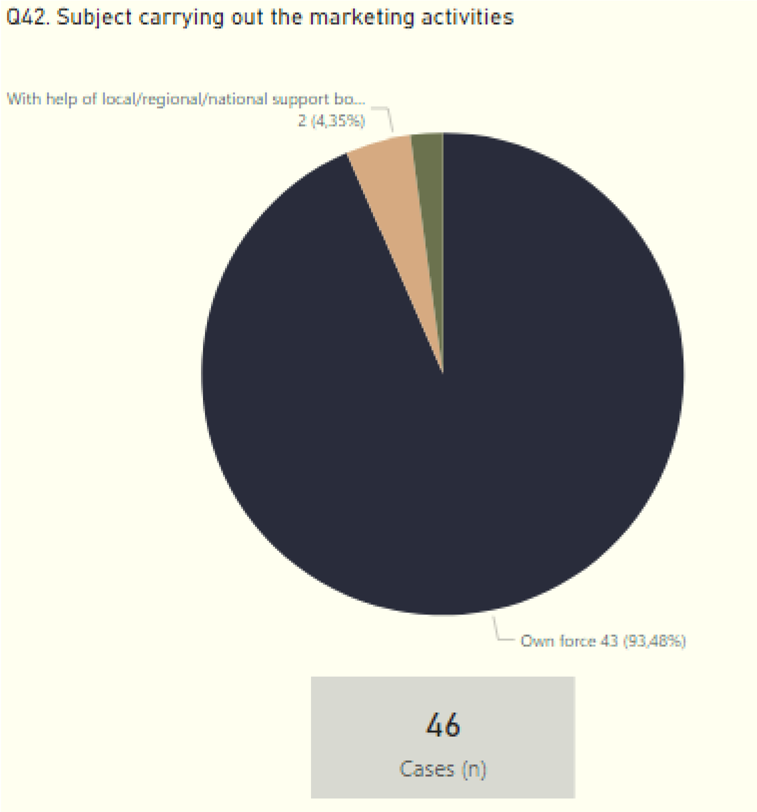


Figure 33 (Slovenia) Participating in the marketing activities

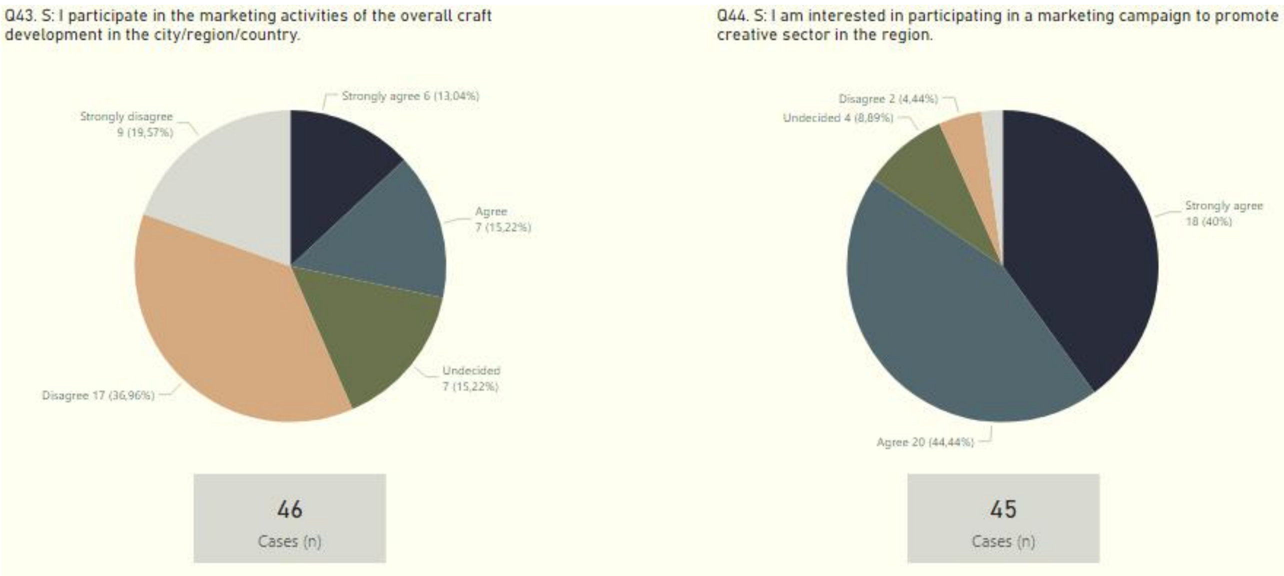


Figure 34 (Slovenia) Marketing activities on social networks

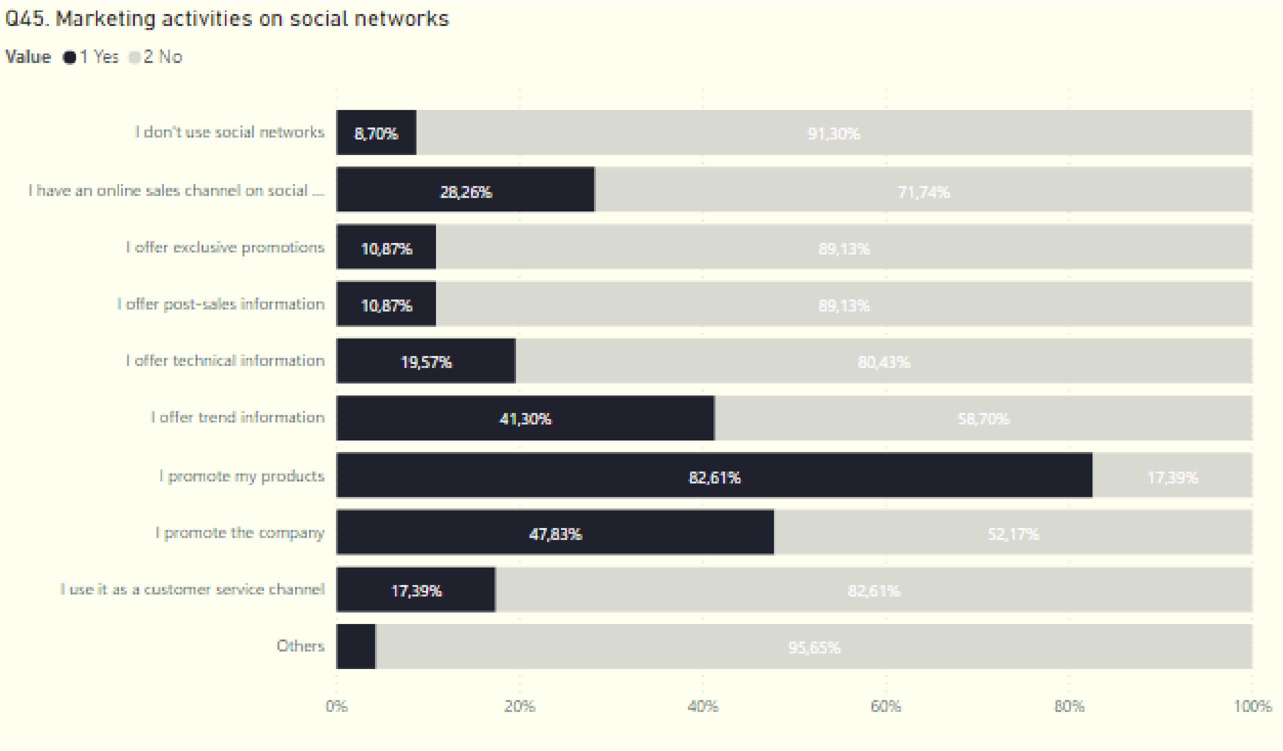


Figure 35 (Slovenia) Feedback on social media

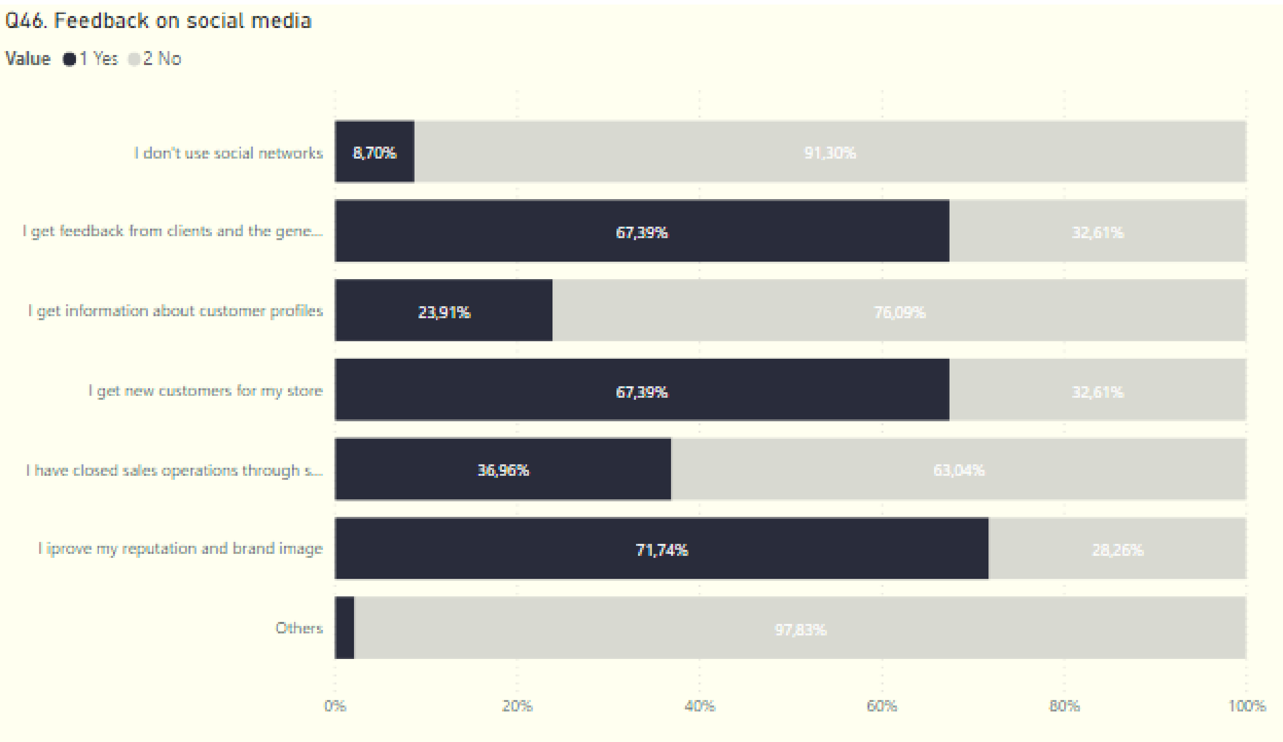


Figure 36 (Slovenia) Currently used distribution channels

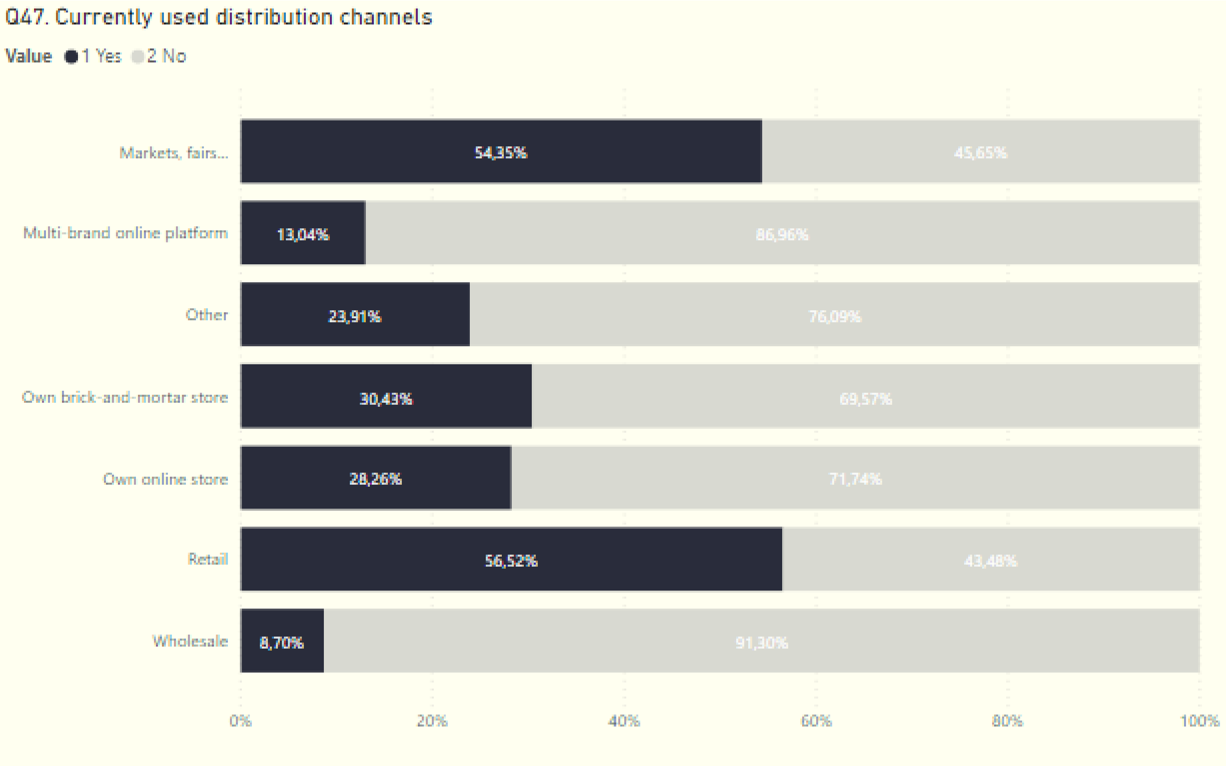
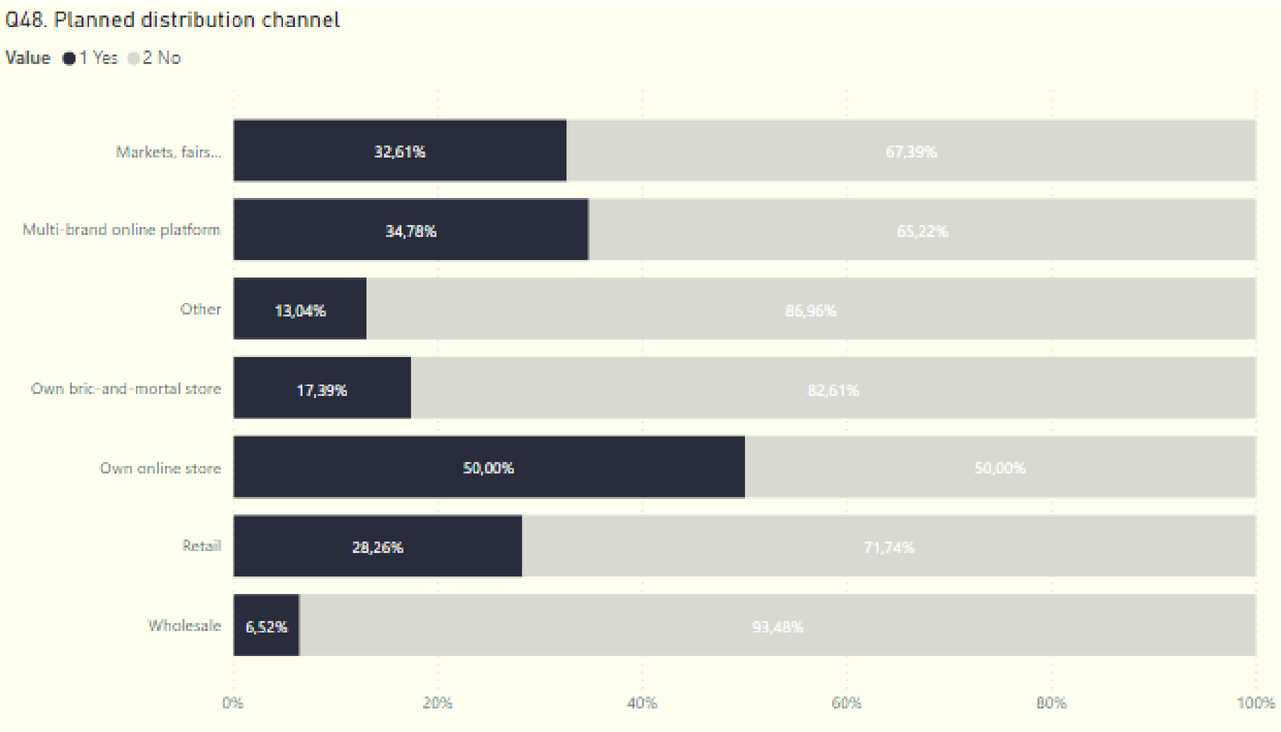


Figure 37 (Slovenia) Planned distribution channels



6.7. Annexes all CerDee countries

6.7.1. Businesses as existing entrepreneurial capacities – graphical overview

Figure 1 (all CerDee countries) Sample - Legal form of respondents

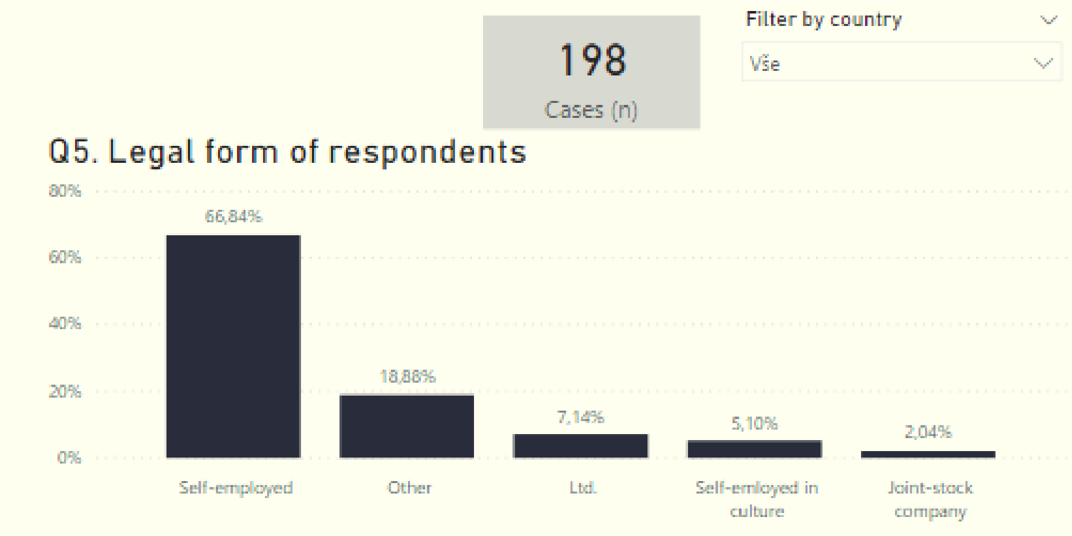


Figure 2 (all CerDee countries) Sample - Length of managing business

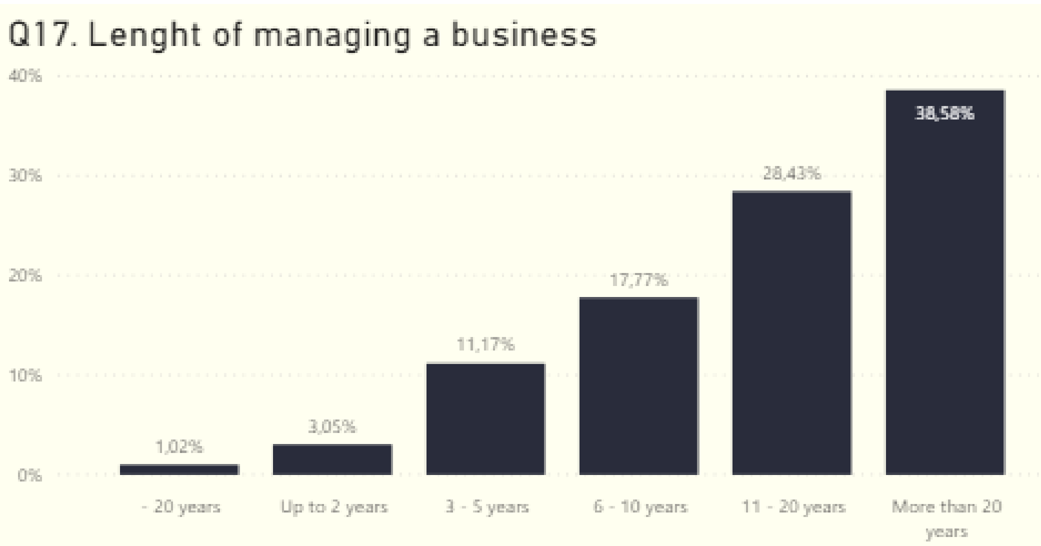


Figure 3 (all CerDee countries) Situation in ceramic sector

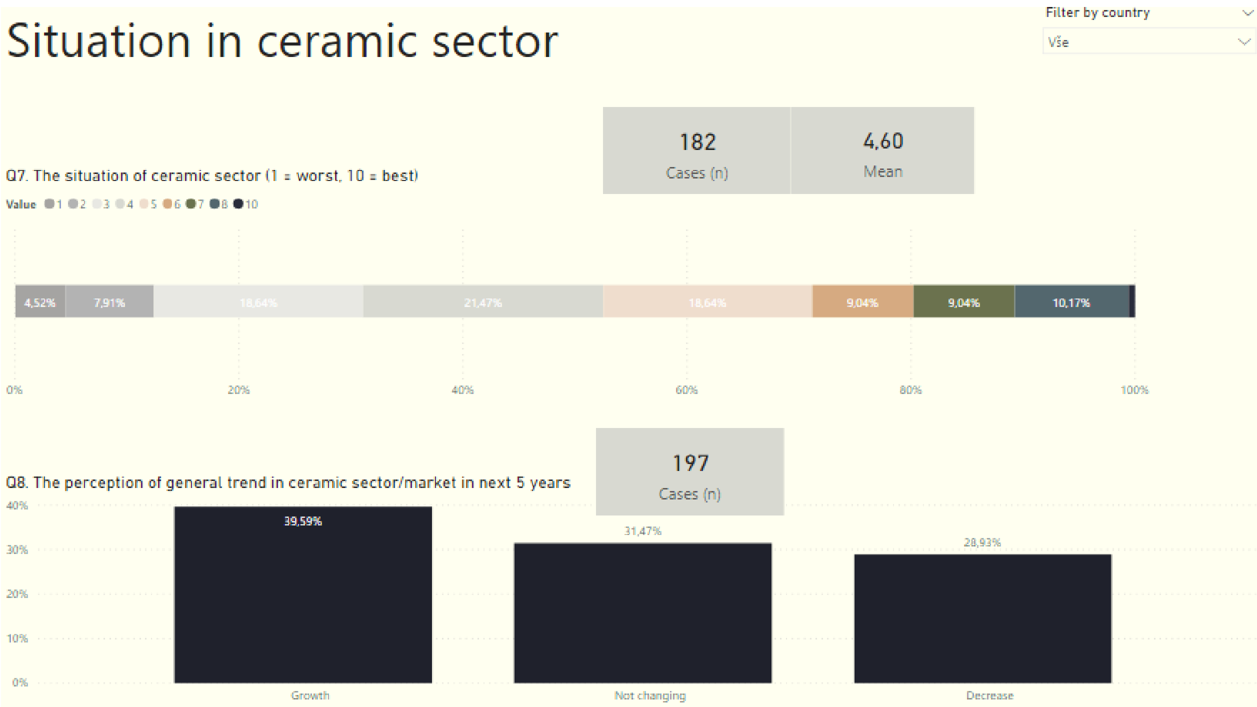


Figure 4 (all CerDee countries) Level of cooperation

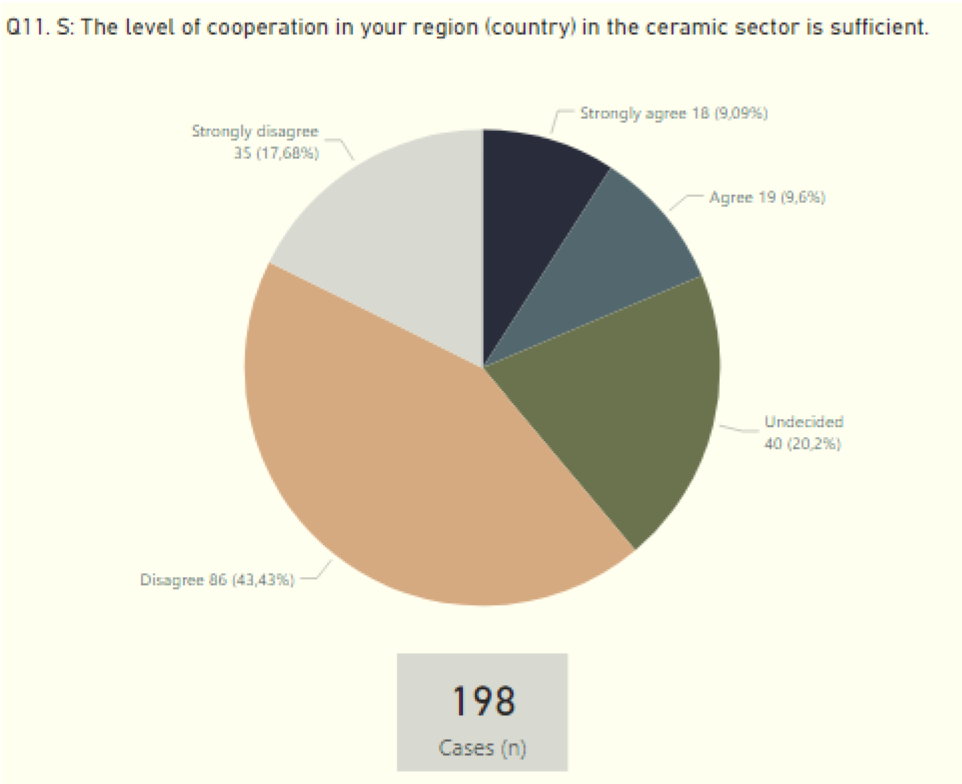


Figure 5 (all CerDee countries) Membership in an association

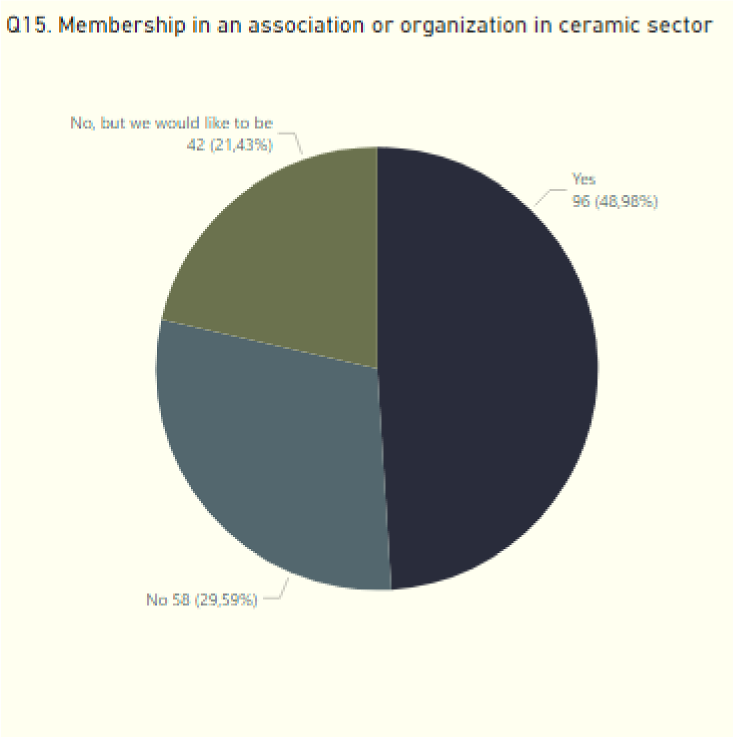


Figure 6 (all CerDee countries) Membership in an association

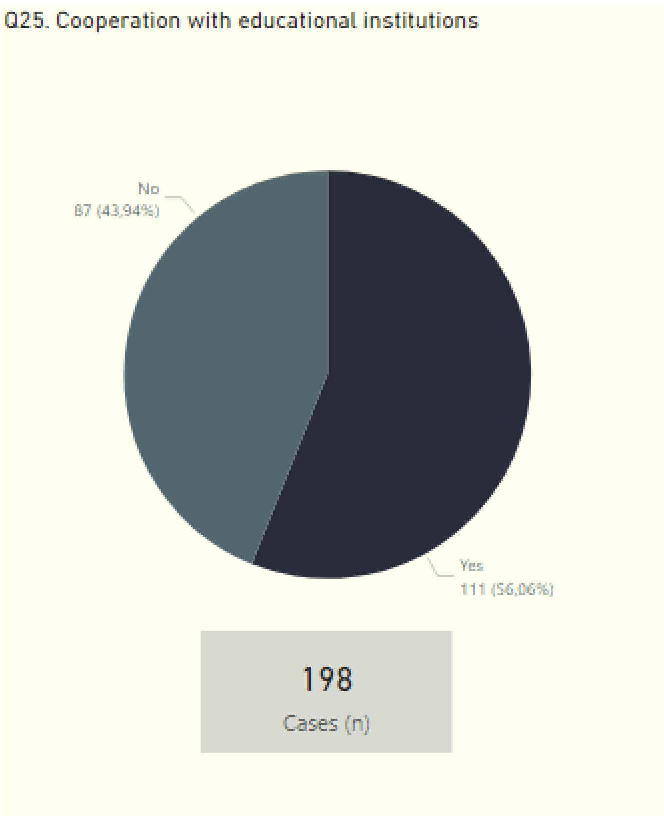


Figure 7 (all CerDee countries) Employee and self-training

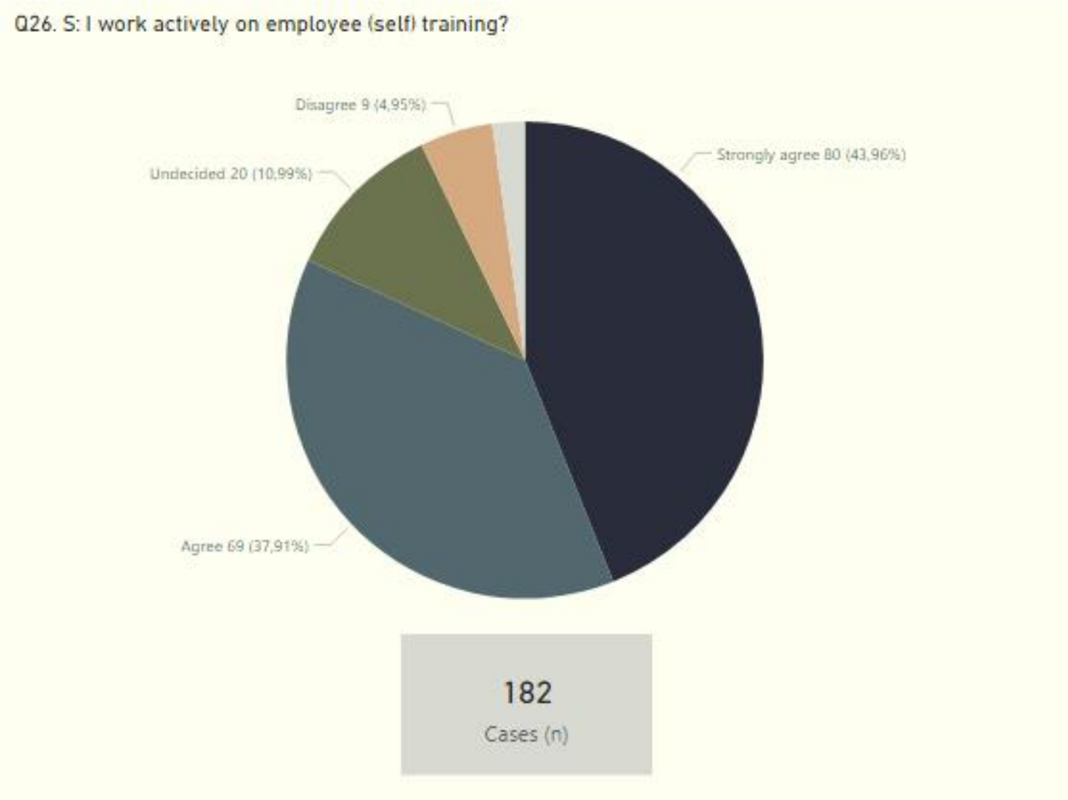


Figure 8 (all CerDee countries) Further education and training topics (craft and design skills)

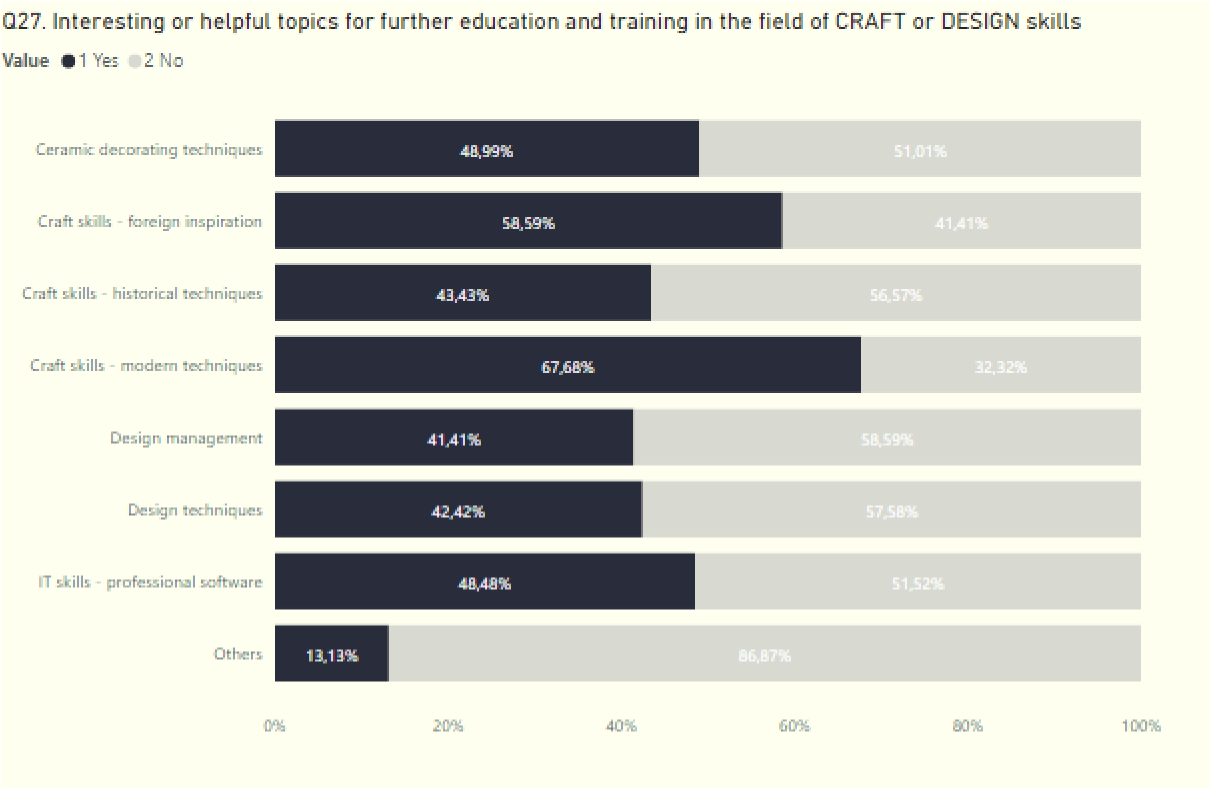


Figure 9 (all CerDee countries) Further education and training topics (management, marketing, and business skills)

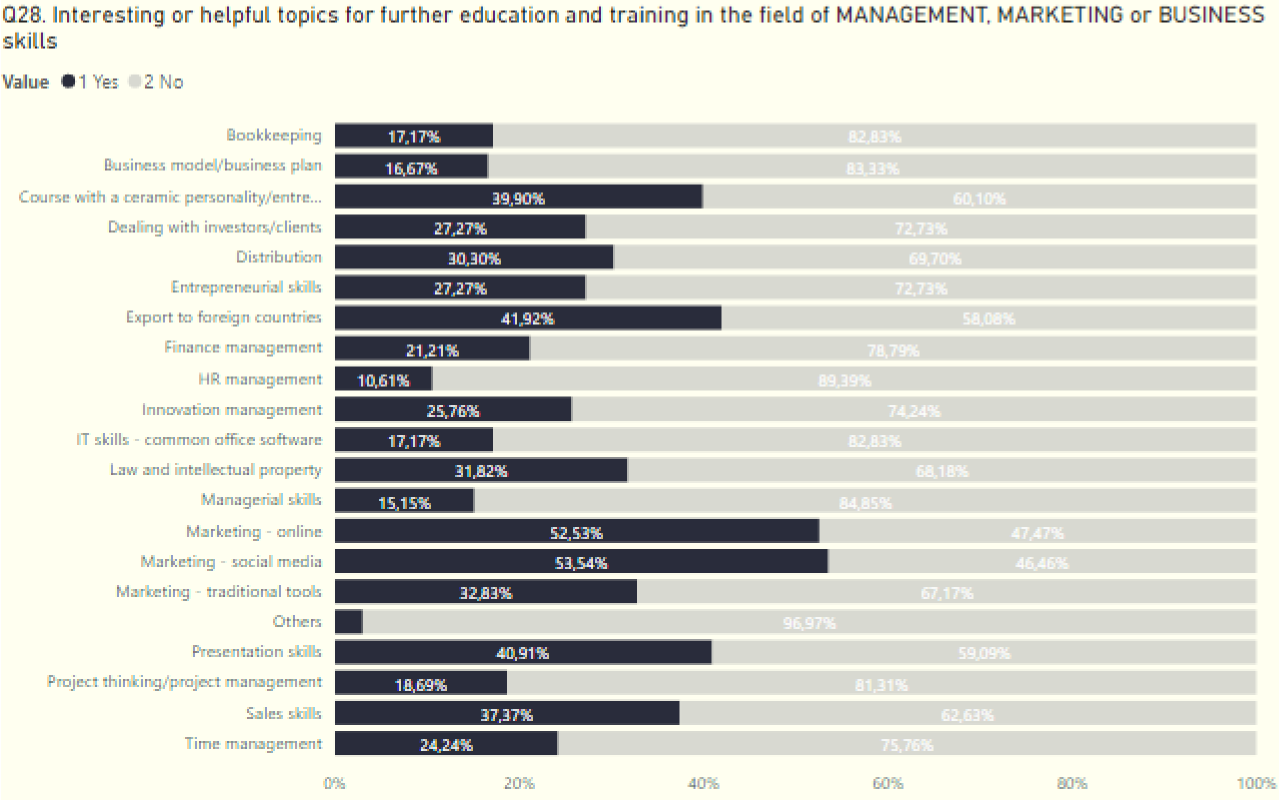
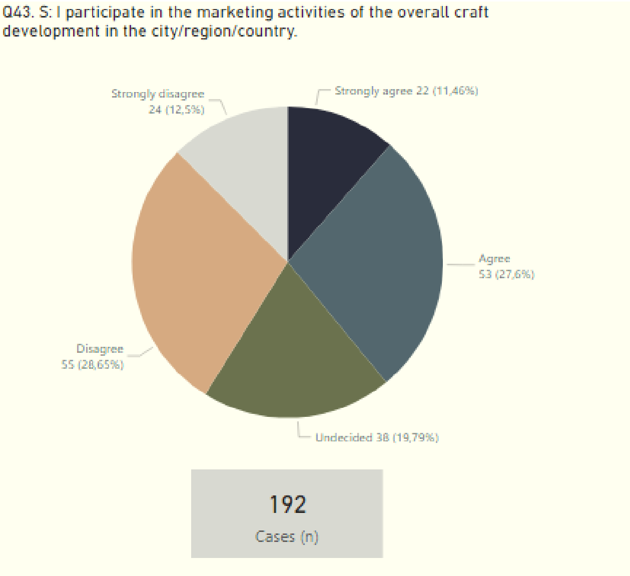


Figure 10 (all CerDee countries) Participating in marketing activities in the city/region/country



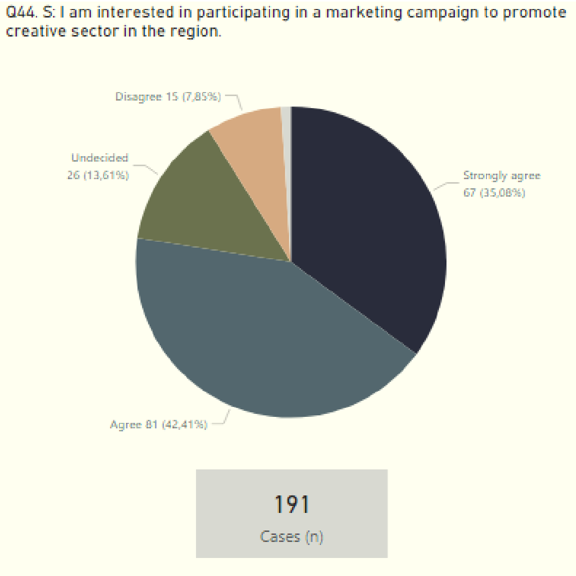


Figure 11 (all CerDee countries) A need of international portal about ceramics

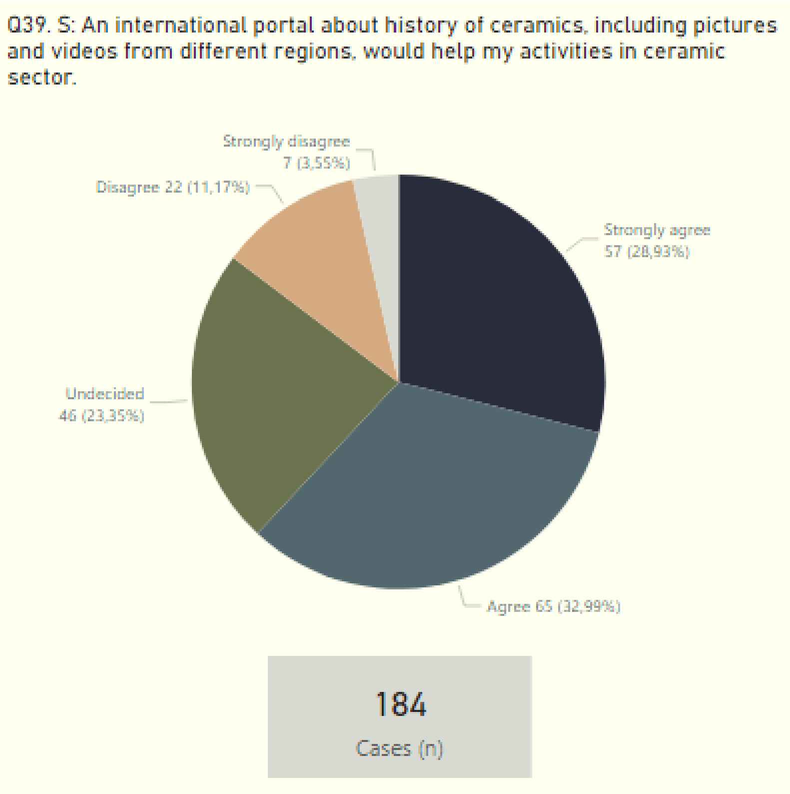
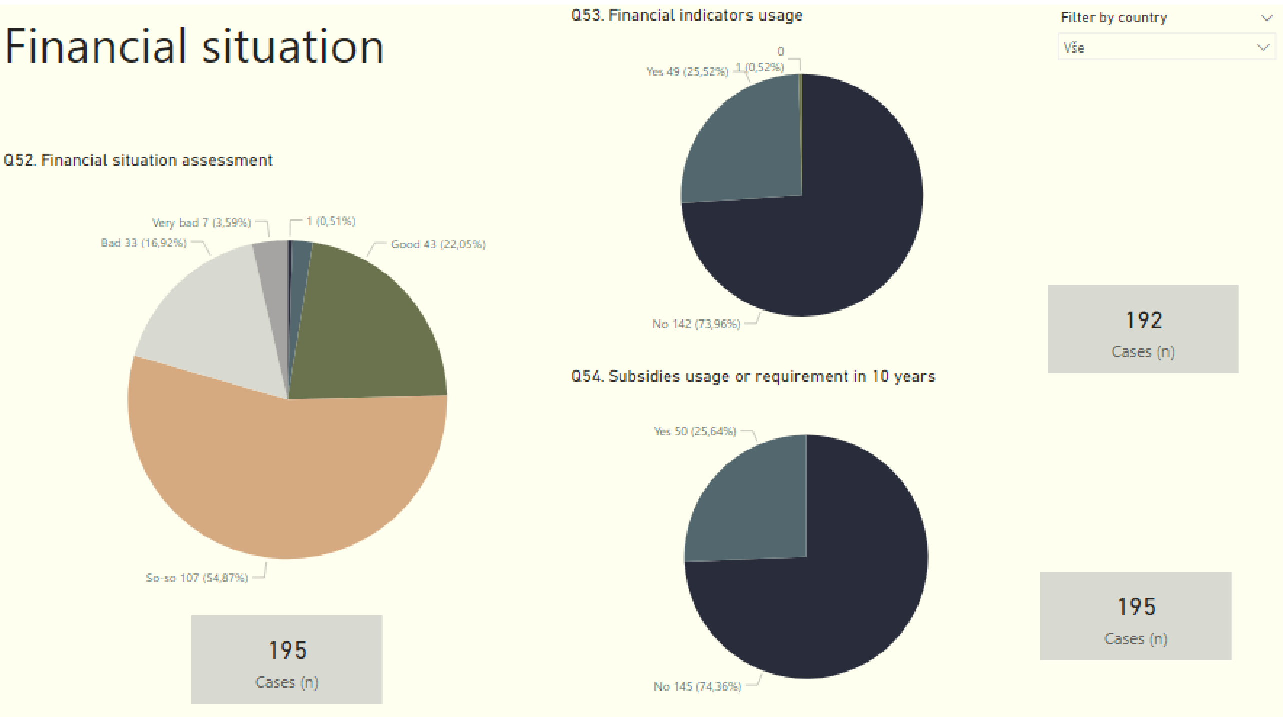


Figure 12 (all CerDee countries) Financial situation



6.7.2. Students as potential entrepreneurial capacities - graphical overview

Figure 13 (all CerDee countries) Sample - students

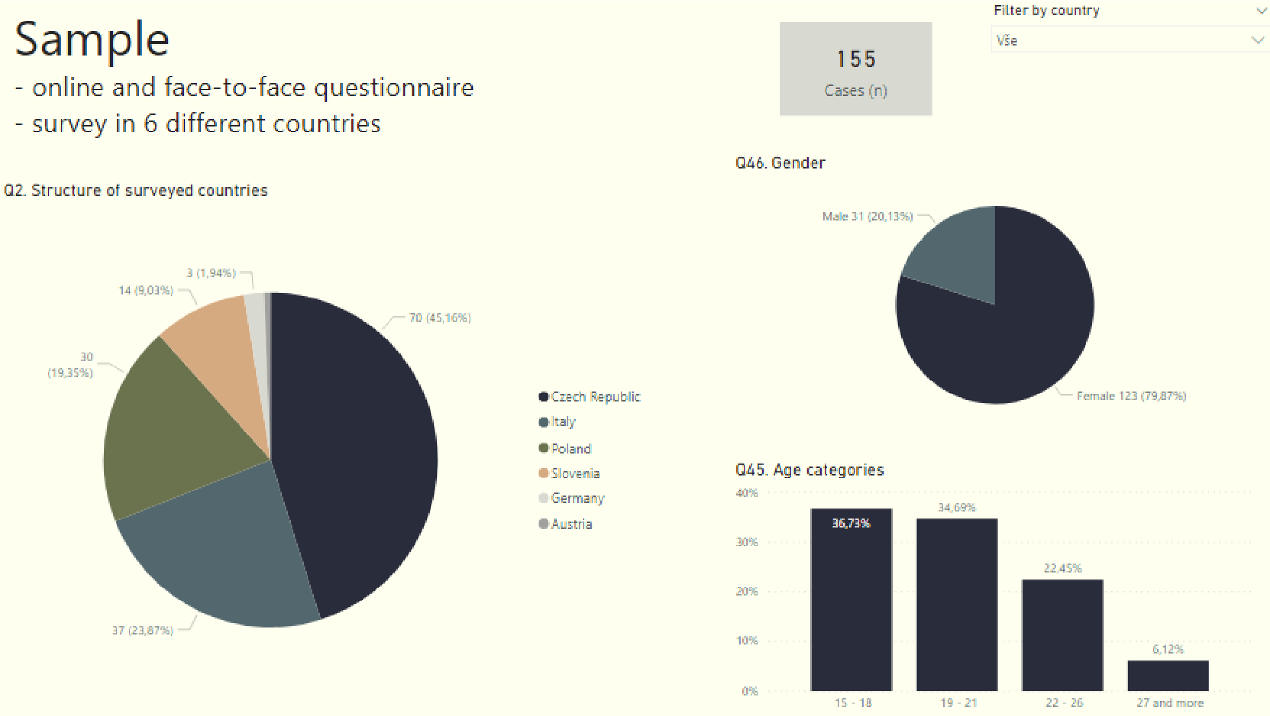


Figure 14 (all CerDee countries) Study direction of students

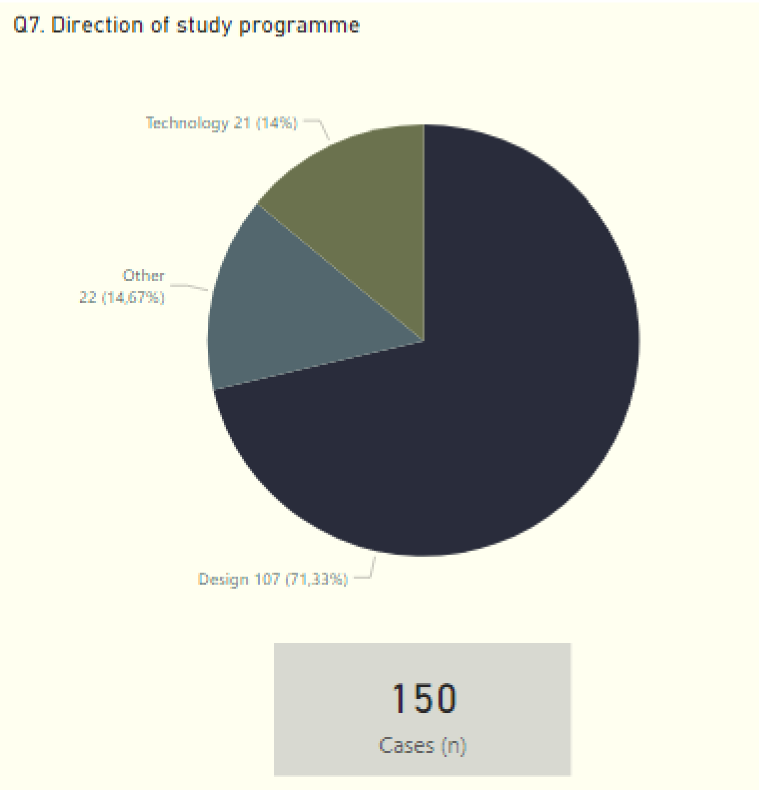


Figure 15 (all CerDee countries) Future direction of students

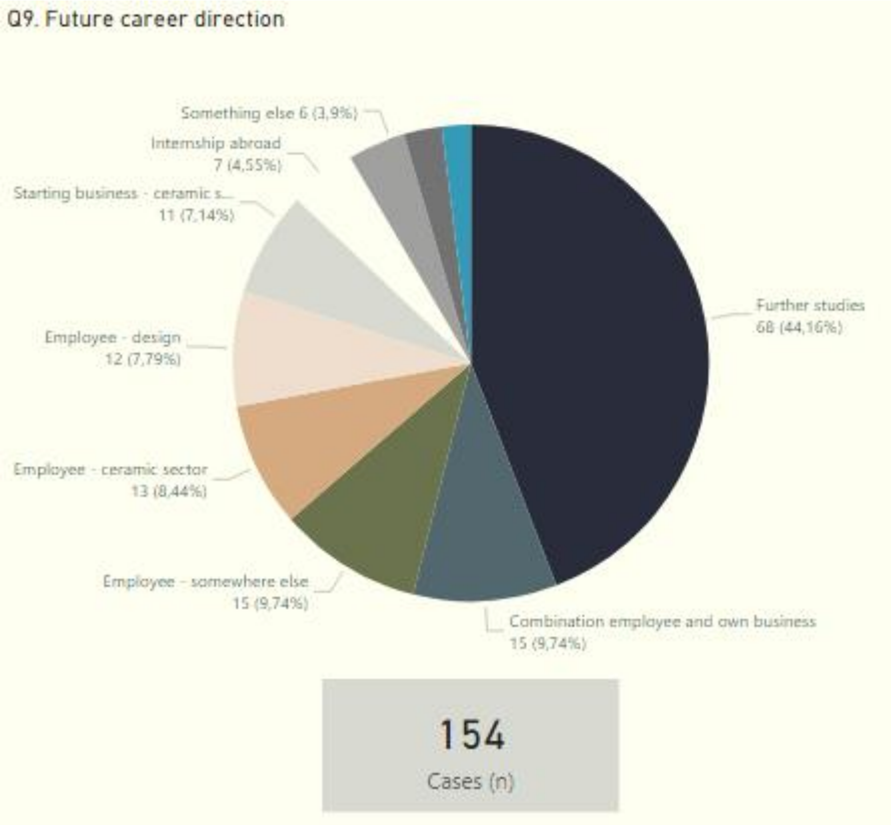
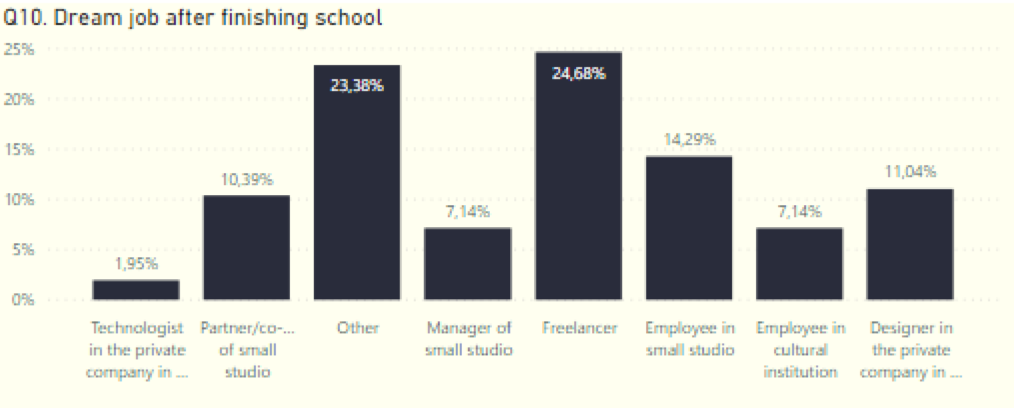


Figure 16 (all CerDee countries) Dream job



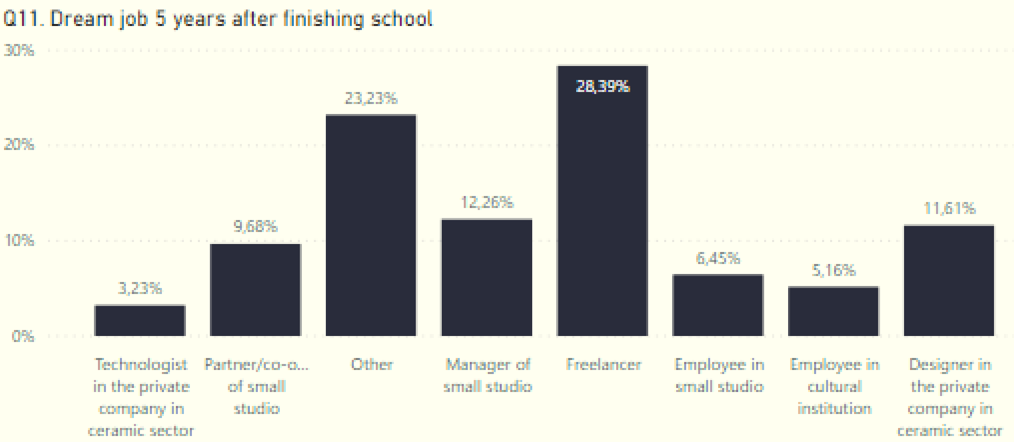


Figure 17 (all CerDee countries) Important students' knowledge/skills gained

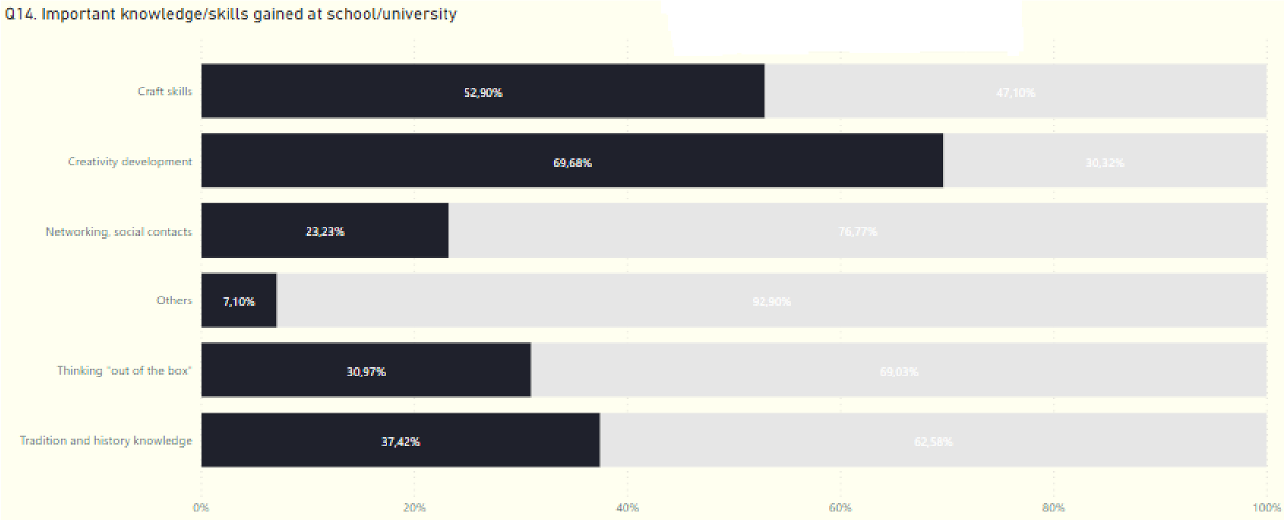


Figure 18 (all CerDee countries) Lack in students' knowledge

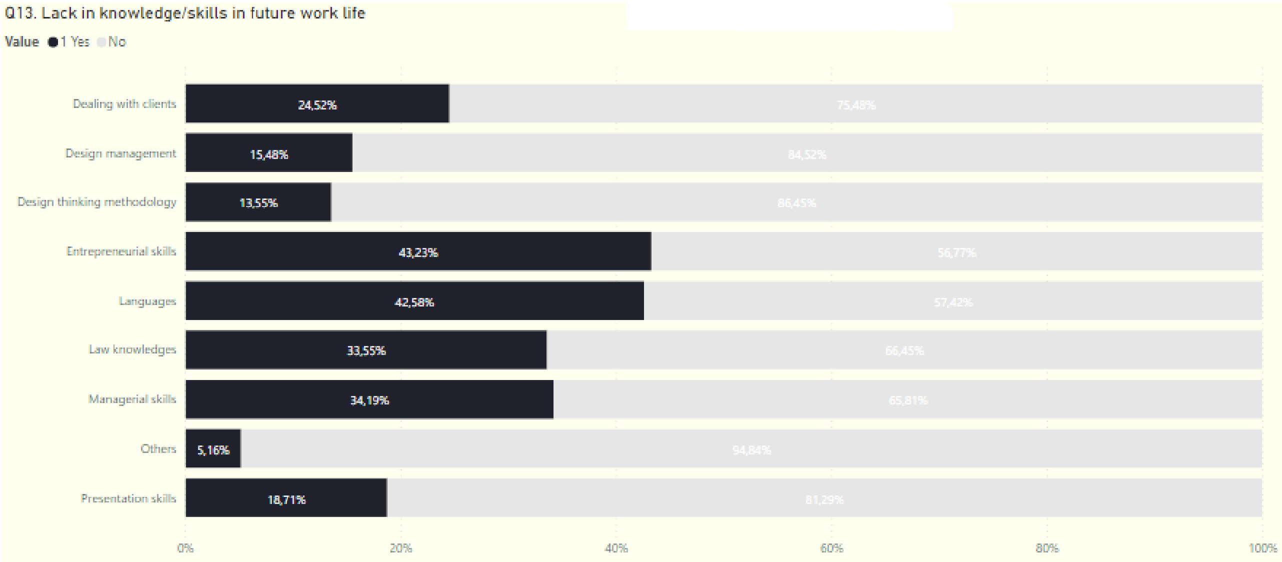


Figure 19 (all CerDee countries) Help with starting own business of finding a job

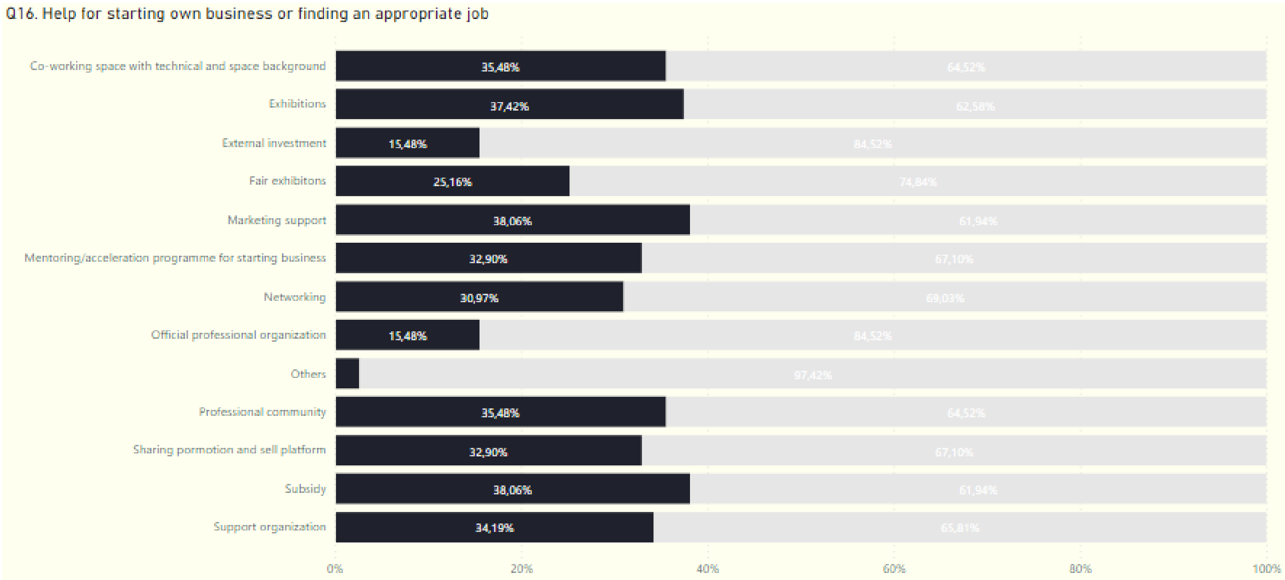
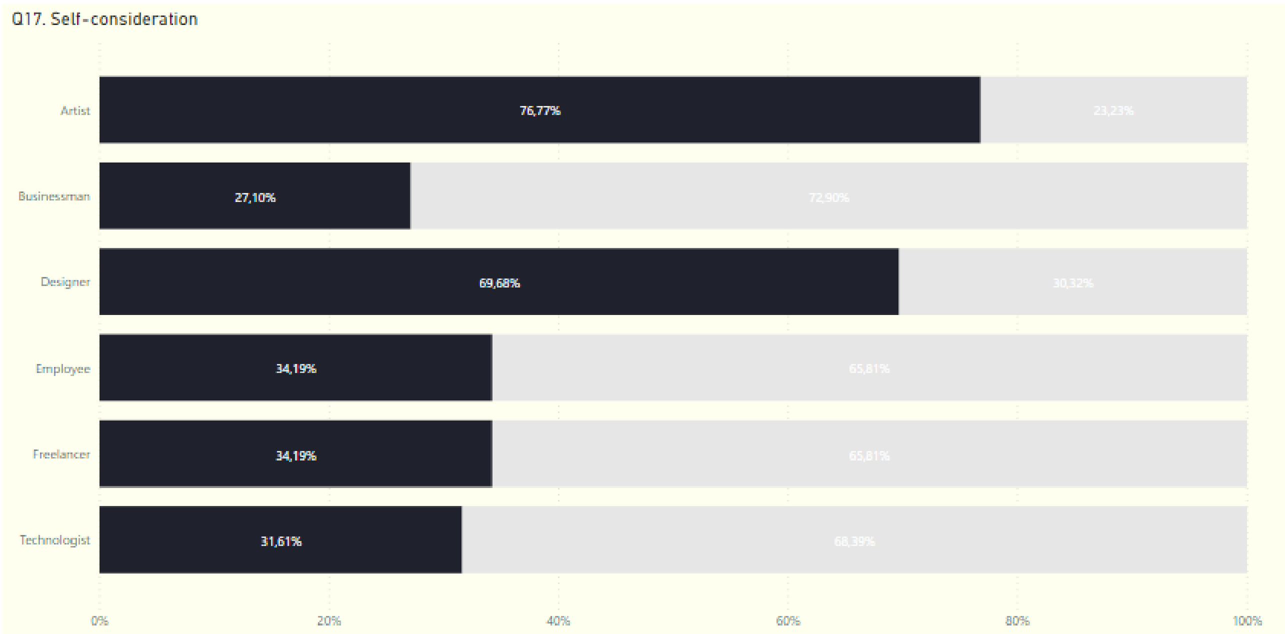


Figure 20 (all CerDee countries) Students' self-consideration



6.7.3. Expectations and needs of stakeholders

Figure 21 (all CerDee countries) Situation in ceramic sector

Figure 22 (all CerDee countries) Intensity of current cooperation

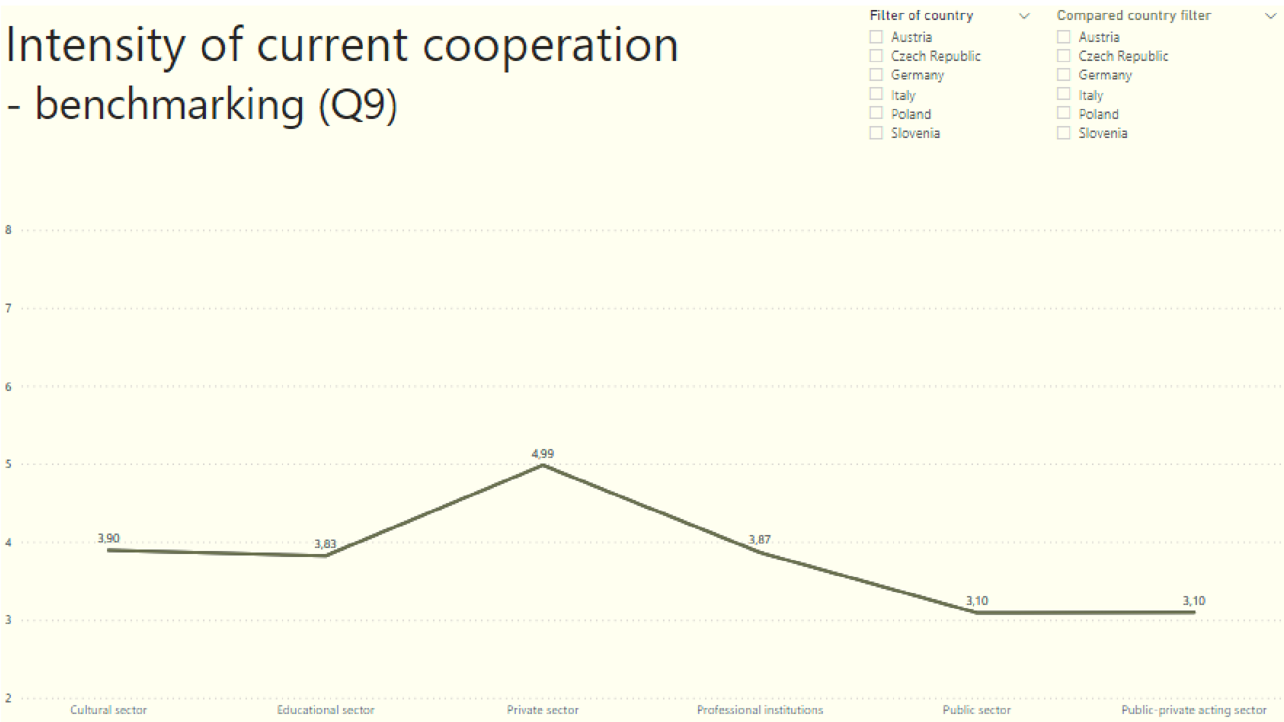


Figure 23 (all CerDee countries) Importance of cooperation

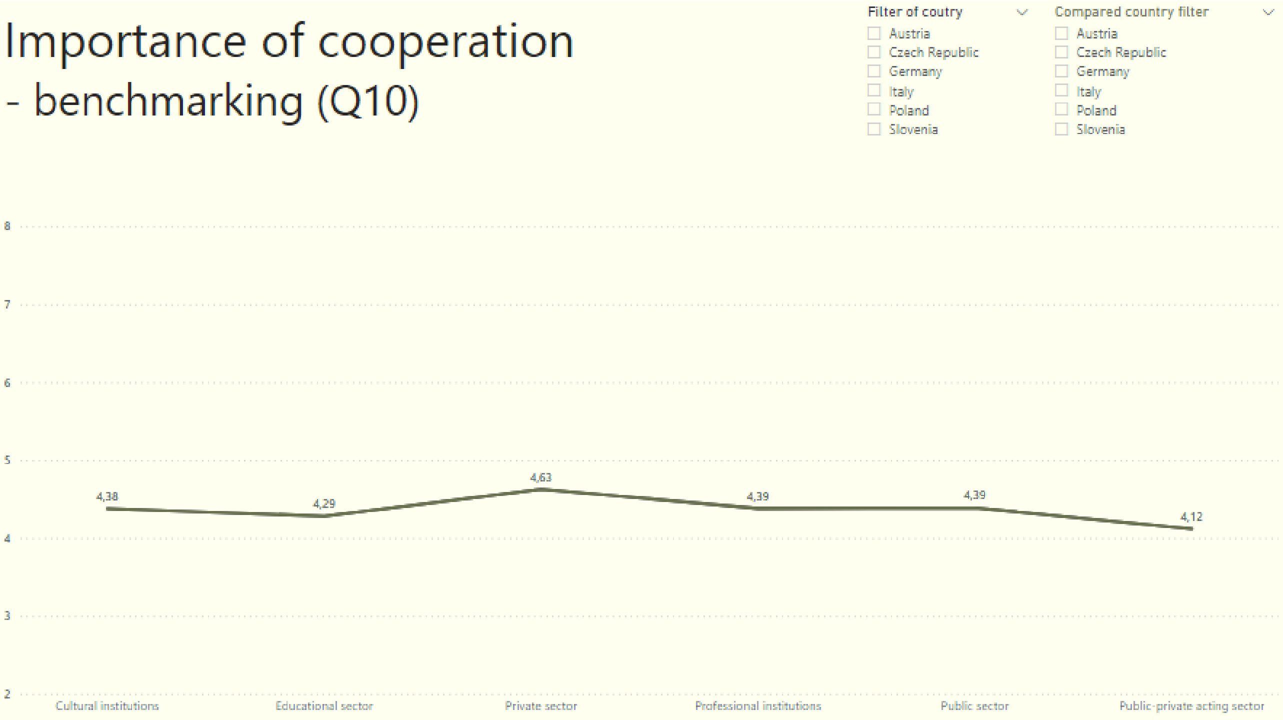


Figure 24 (all CerDee countries) Influence level

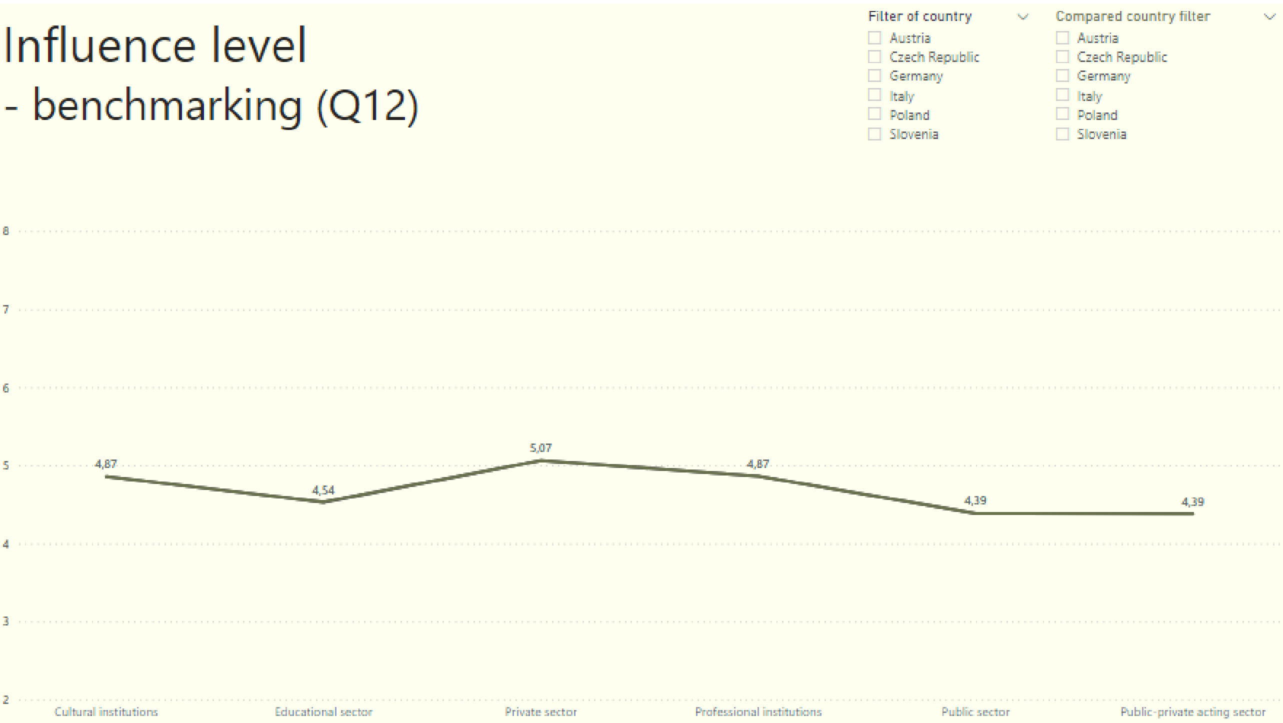
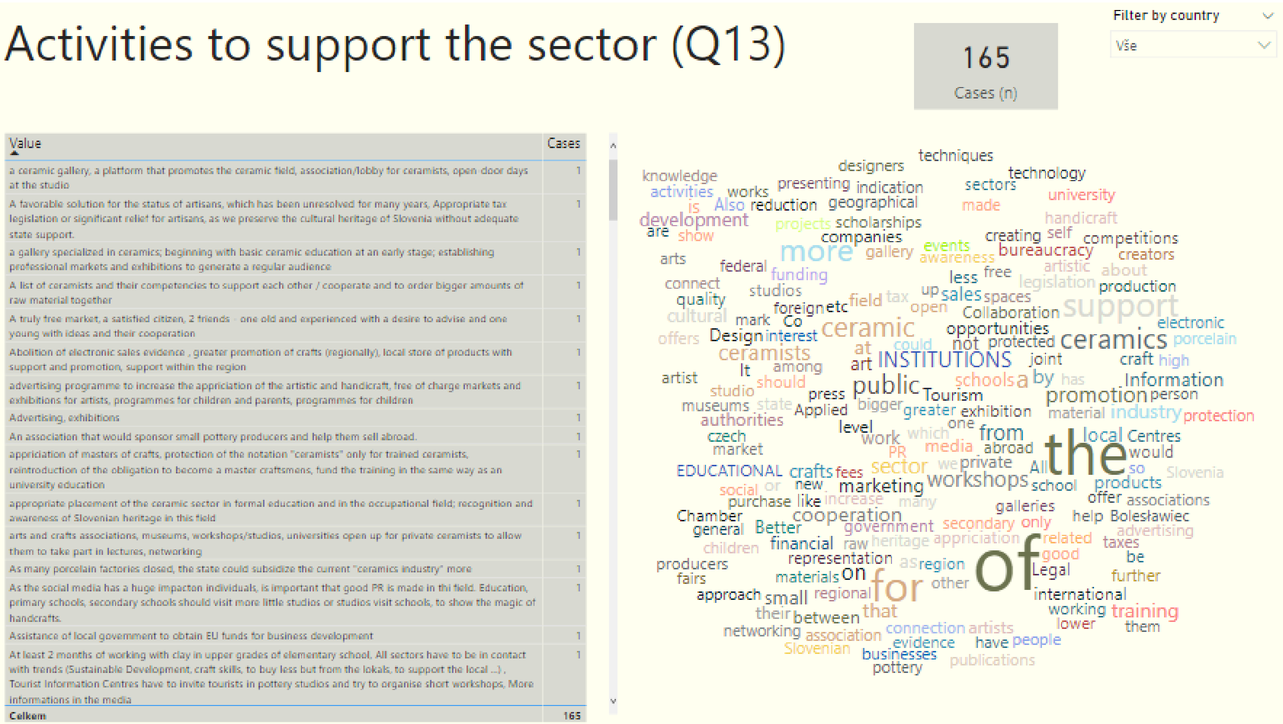


Figure 25 (all CerDee countries) Support or cooperation



Value	Cases
a ceramic gallery, a platform that promotes the ceramic field, association/lobby for ceramists, open door days at the studio	1
A favorable solution for the status of artisans, which has been unresolved for many years, Appropriate tax legislation or significant relief for artisans, as we preserve the cultural heritage of Slovenia without adequate state support.	1
a gallery specialized in ceramics; beginning with basic ceramic education at an early stage; establishing professional markets and exhibitions to generate a regular audience	1
A list of ceramists and their competencies to support each other / cooperate and to order bigger amounts of raw material together	1
A truly free market, a satisfied citizen, 2 friends - one old and experienced with a desire to advise and one young with ideas and their cooperation	1
Abolition of electronic sales evidence , greater promotion of crafts (regionally), local store of products with support and promotion, support within the region	1
advertising programme to increase the appriciation of the artistic and handicraft, free of charge markets and exhibitions for artists, programmes for children and parents, programmes for children	1
Advertising, exhibitions	1
An association that would sponsor small pottery producers and help them sell abroad.	1
appriciation of masters of crafts, protection of the notation "ceramists" only for trained ceramists, reintroduction of the obligation to become a master craftsmens, fund the training in the same way as an university education	1
appropriate placement of the ceramic sector in formal education and in the occupational field; recognition and awareness of Slovenian heritage in this field	1
arts and crafts associations, museums, workshops/studios, universities open up for private ceramists to allow them to take part in lectures, networking	1
As many porcelain factories closed, the state could subsidize the current "ceramics industry" more	1
As the social media has a huge impacton individuals, is important that good PR is made in thi field. Education, primary schools, secondary schools should visit more little studios or studios visit schools, to show the magic of handcrafts.	1
Assistance of local government to obtain EU funds for business development	1
At least 2 months of working with clay in upper grades of elementary school, All sectors have to be in contact with trends (Sustainable Development, craft skills, to buy less but from the lokals, to support the local ...) , Tourist Information Centres have to invite tourists in pottery studios and try to organise short workshops, More informations in the media	1
Celkem	**165**

Figure 26 (all CerDee countries) Attitude towards a statement

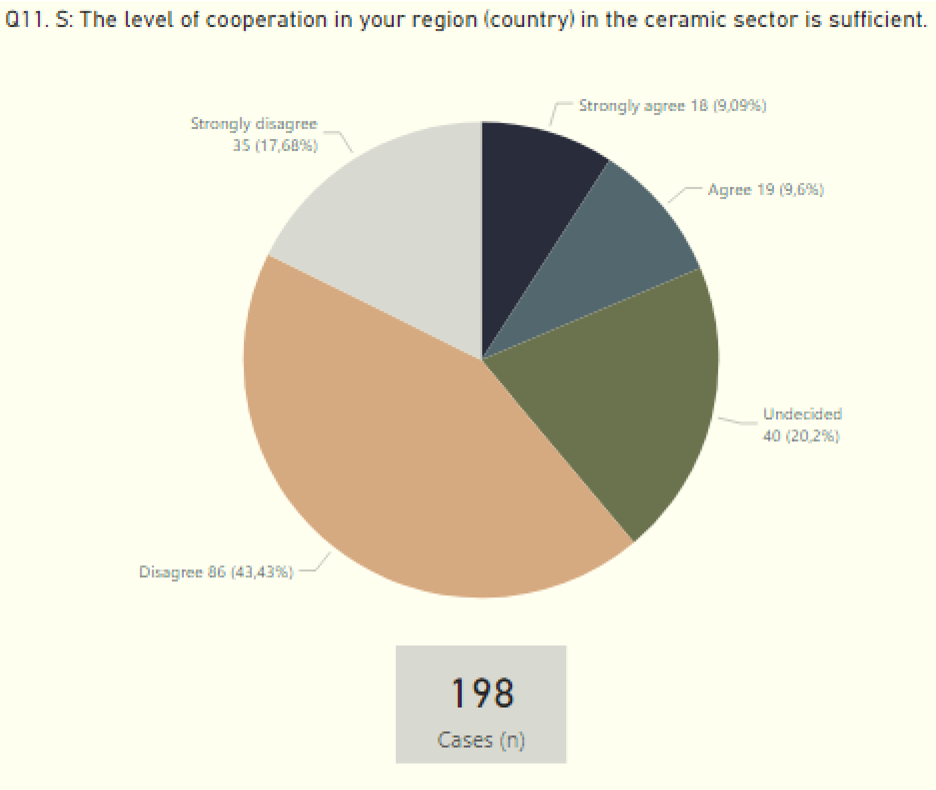
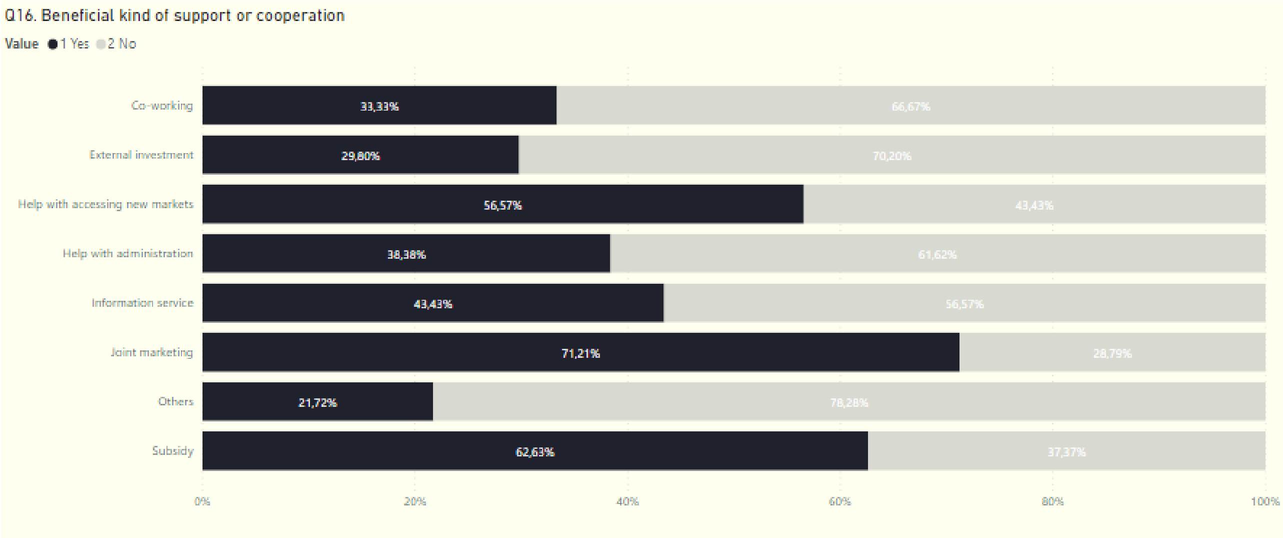


Figure 27 (all CerDee countries) Financial situation, attitude towards a statement



6.7.4. Marketing activities

Figure 28 (all CerDee countries) Currently used marketing activities

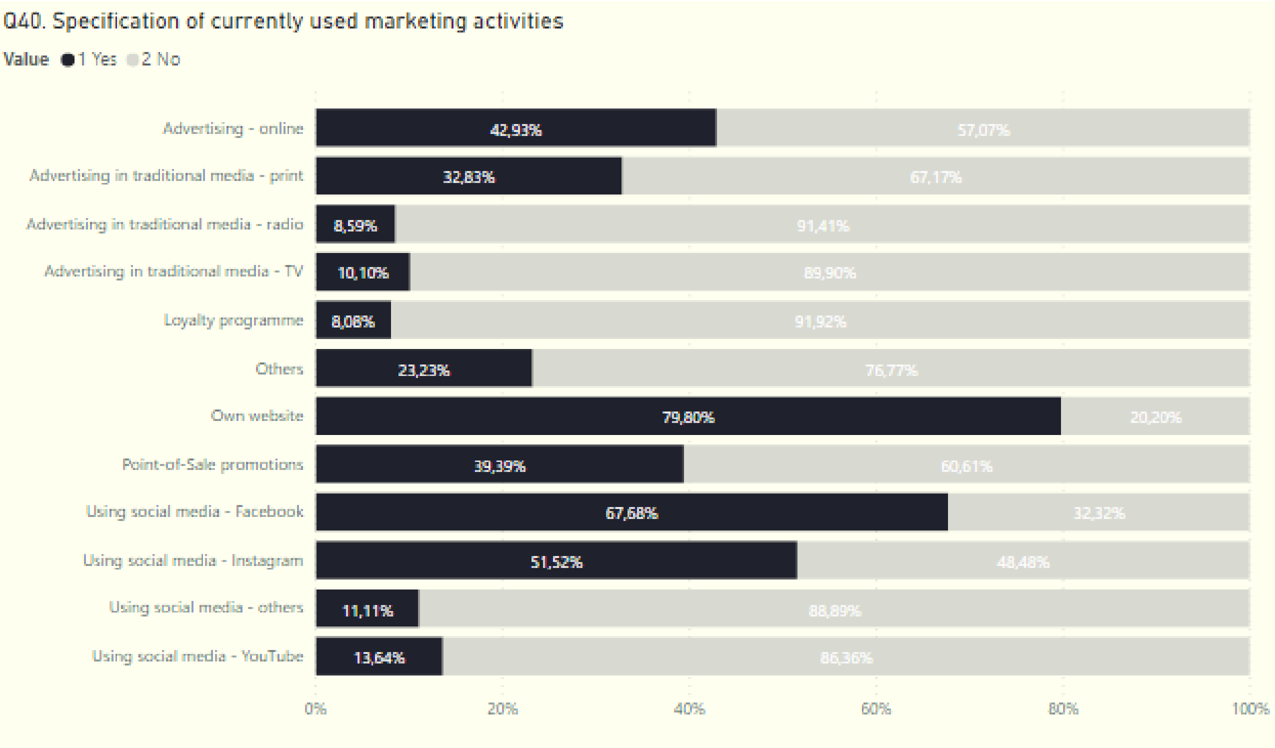


Figure 29 (all CerDee countries) Marketing activities planned for the future

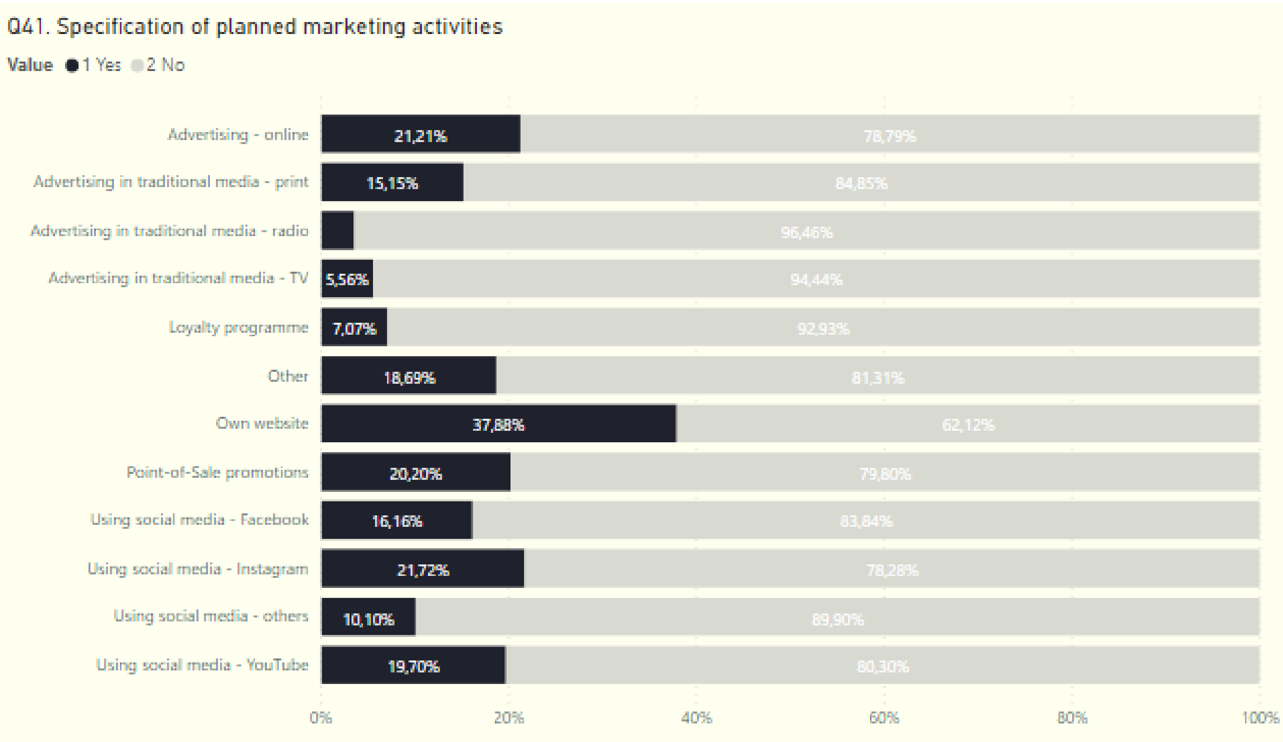


Figure 30 (all CerDee countries) Responsibility for marketing activities

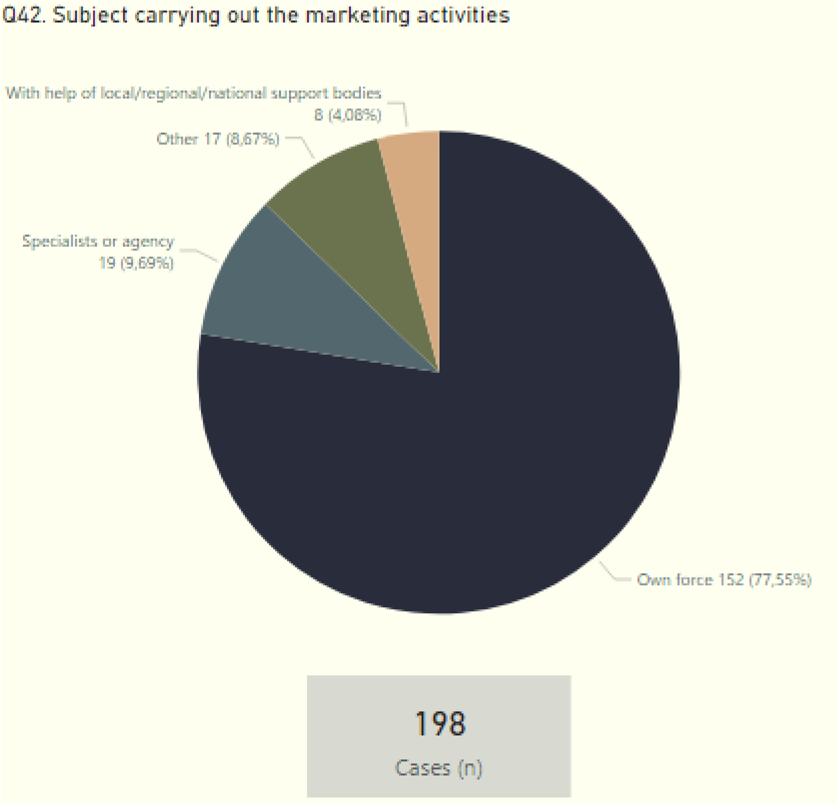


Figure 31 (all CerDee countries) Participating in the marketing activities

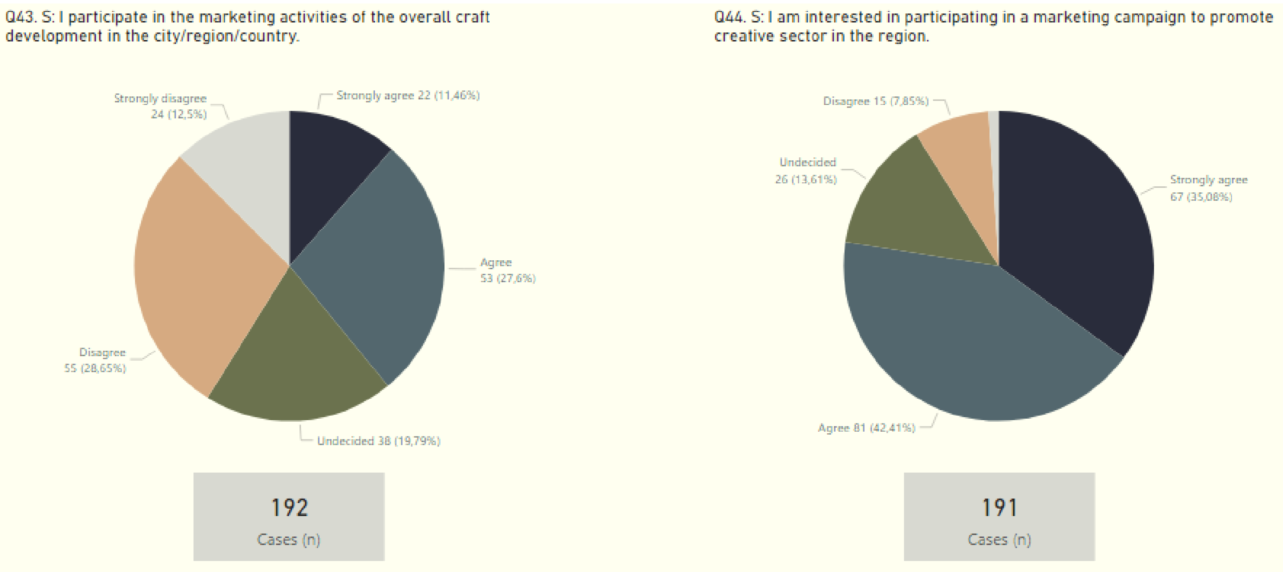


Figure 32 (all CerDee countries) Marketing activities on social networks

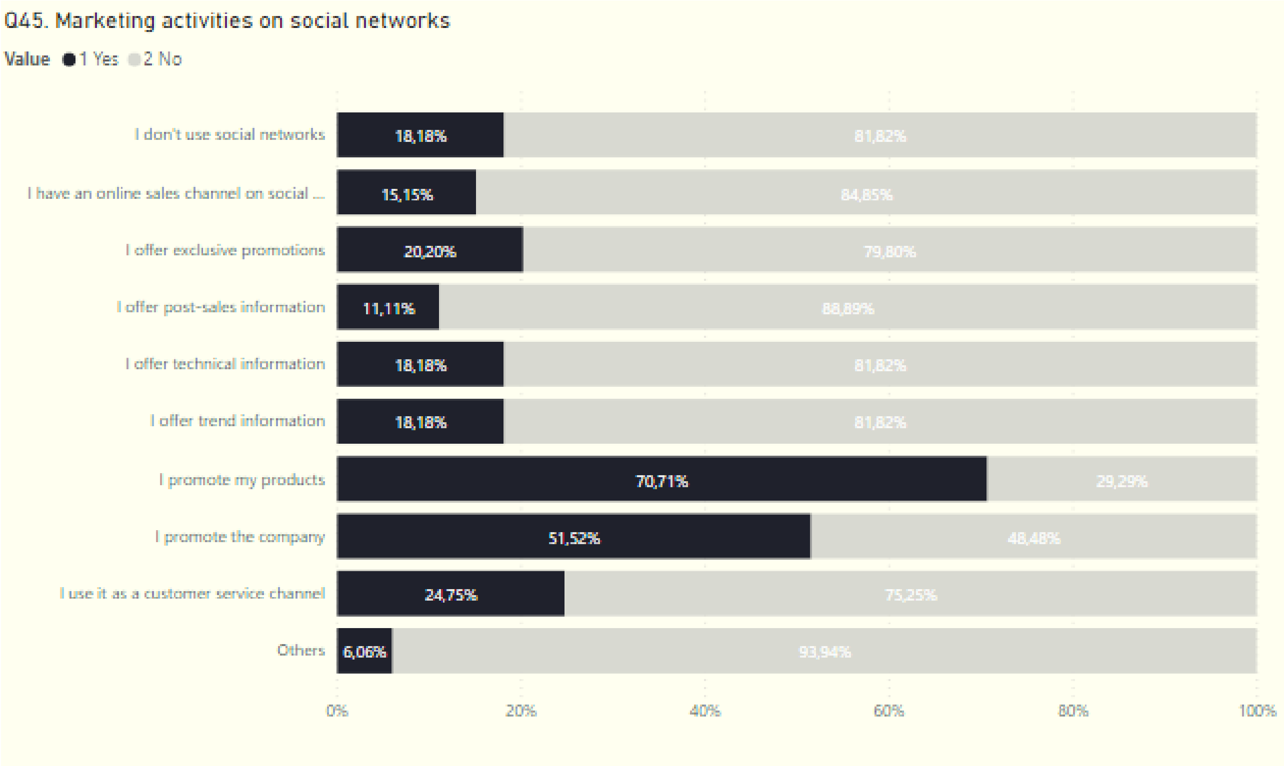


Figure 33 (all CerDee countries) Feedback on social media

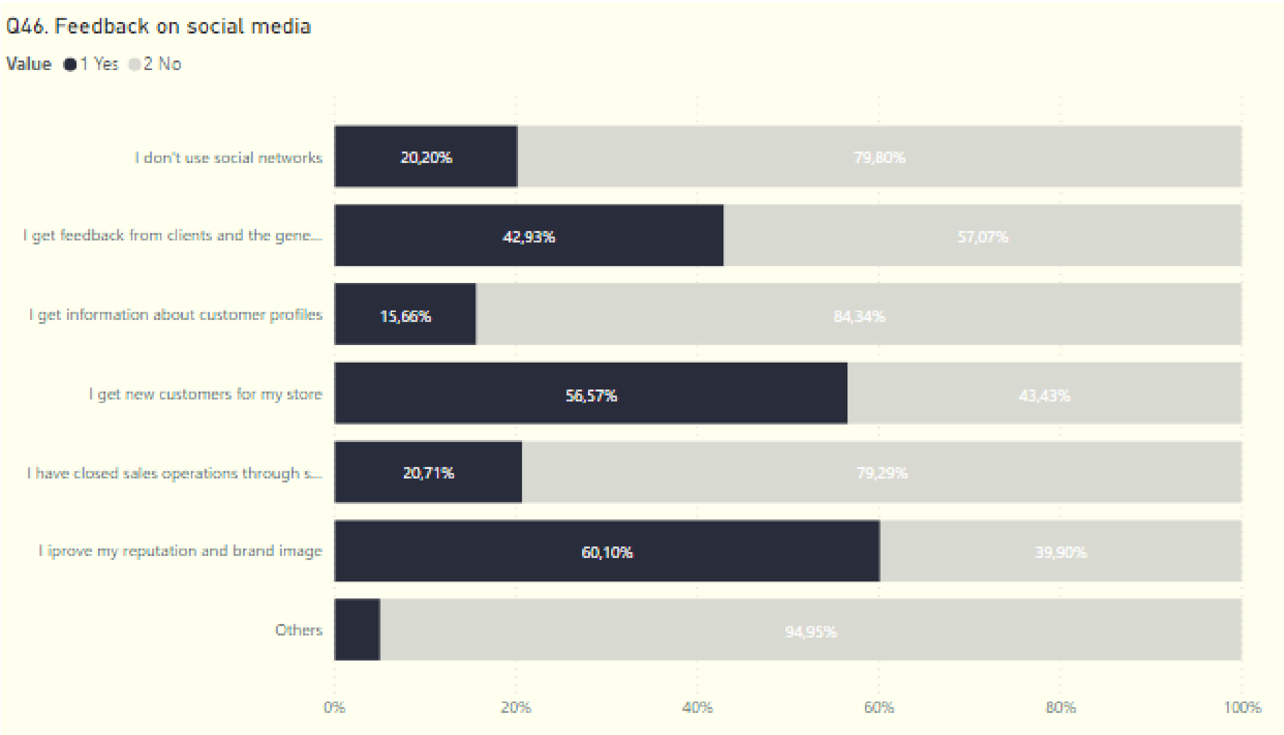


Figure 34 (all CerDee countries) Currently used distribution channels

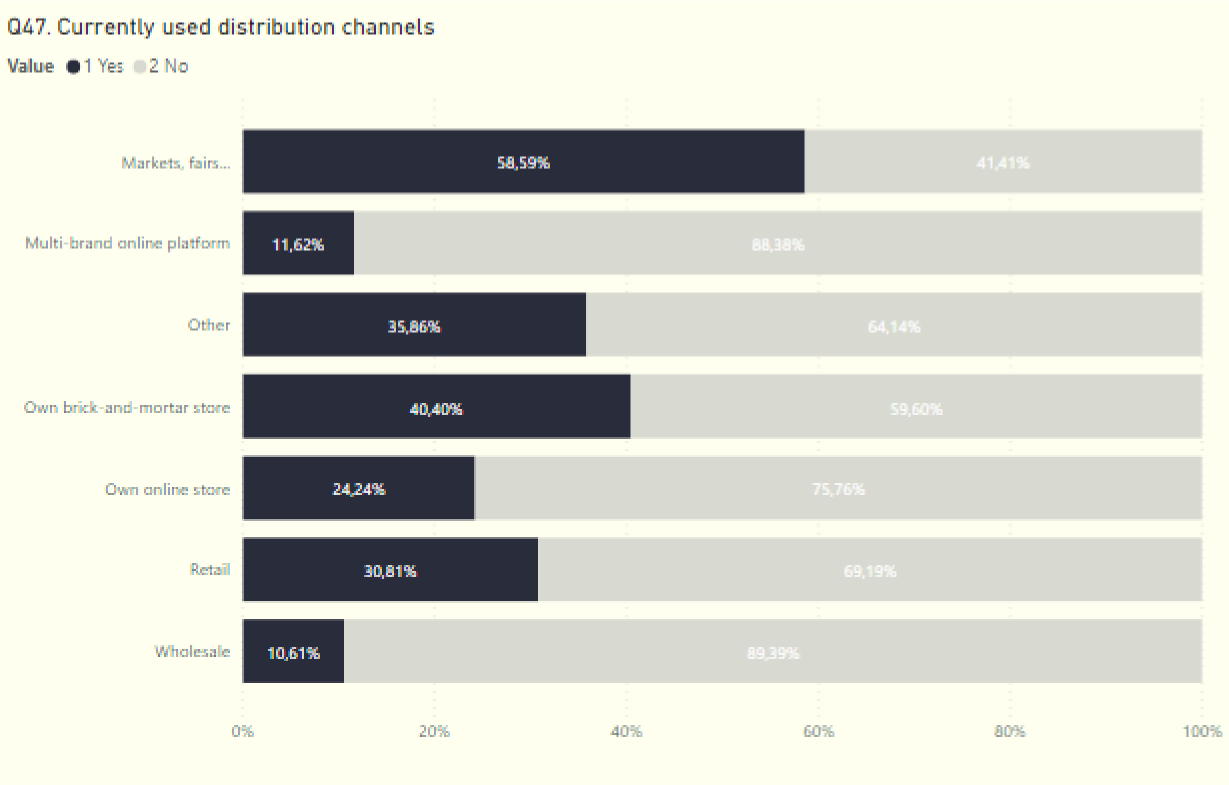


Figure 35 (all CerDee countries) Planned distribution channels