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Project „Development of joint strategy and cooperation network for promotion of creative industries” LLIII-194

„TRENDS OF CREATIVE INDUSTRIES SECTOR DEVELOPMENT IN SIAULIAI REGION“

Feasibility study

Siauliai, 2012

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SUMMARY

The creative and cultural economy is currently one of the fastest growing sectors of the economy, whose contribution to gross domestic product is huge, and cost-effectiveness of creative industries companies is higher than the total private sector's economic performance average.

However, the creative and cultural sector in most countries, including Lithuania, is still traditionally perceived as a beneficiary or a tangible profit not producing educational and training measure.

In recent decades, the ongoing rapid development of new technologies and increasing globalization is leading to a shift from traditional manufacturing to service and innovation, and the main "raw material" is creativity, imagination and innovation. In this aspect concept of creative economy or creative industries becomes especially important.

In order to analyze the situation of creative industries sector in Siauliai region at aspects of potential, trends development and by implementing project „Development of joint strategy and cooperation network for promotion of creative industries”, PI „Siauliai region development agency“ implemented research and prepared feasibility study „Trends of Creative Industries Sector Development in Siauliai region“

INTRODUCTION

Despite the fact, that creative industries worldwide are recognized as model of advanced market and art development, which is introducing also in Lithuania from 2003, but it's needed to admit, that evolution of creative industries in country, and also in Siauliai region is/are still problematic.

In order to analyze the situation of creative industries sector in Siauliai region at aspects of potential, trends development and by implementing project „Development of joint strategy and cooperation network for promotion of creative industries” in accordance with Latvia Lithuania cross border cooperation programme 2007-2013 feasibility study „Trends of Creative Industries Sector Development in Siauliai region“ was prepared.

The aim of feasibility study – to analyze demand and potential of creative industries sector in Siauliai region.

The objectives of feasibility study:

- ❑ by pursuing analysis of data of LR Statistics Department and questionnaire research, to analyze the interests, opportunities, activity factors, the prognosis of perspective activity directions and labor force of Siauliai region creative industries sector subjects;
- ❑ to present the guidelines for improving prevention of identified problematical aspects of Siauliai region creative industries sector.

Target groups:

- ❑ the directors of companies of Siauliai region creative industries sector;
- ❑ the directors of Siauliai region art education, culture institutions;
- ❑ the students of Siauliai region art education institutions;
- ❑ the schoolchild of Siauliai region art education institutions.

The methods of the research:

In order to collect comprehensive information about opportunities of activity development, demand of specialists, motivation, opinion about situation of creative industries in Lithuania and the most perspective art directions of Siauliai region creative industries sector subjects, questionnaire method was used. The questionnaire was oriented to assessment of creative industries subjects opinions, about rising demands and interests

1. THE ANALYSIS OF PROJECT ENVIRONMENT

1.1. The general economic-cultural analysis of Siauliai region

Siauliai district – one of ten Lithuanian districts, located in the northern part of the country. In Siauliai district territory 7 municipalities are located: Akmenė region, Joniškis region, Kelme region, Pakruojis region, Radviliskis region, Siauliai region and Siauliai city.



Figure No. 1.1.1. Geographical location of Siauliai district

Source: http://lt.wikipedia.org/wiki/%C5%A0iauli%C5%B3_apskritis



Figure No. 1.1.2. Location of Siauliai district regions

Source: http://regionai.stat.gov.lt/lt/siauliu_apskritis.html

Siauliai district municipality contains central part of Siauliai district. Municipality contains one town – Kursenai, 7 townships – Bazilionai, Gruzdžiai, Kairiai, Kurtuvenai, Kuziai, Meskučiai and Sakyna, 11 parishes. The area of municipality contains 1807 km² (21, 2 % of district area), number of inhabitants in beginning of the year 2012 - 45 947 (LR Statistics Department).

1.2. The legal base of Lithuanian creative industries

1.2.1. The survey of main documents

In 2007 in Lithuania was established The Strategy of Promotion and Development of Creative Industries (Commandment of LR Minister of culture No IV-217 „For Approval of The Strategy of Promotion and Development of Creative Industries”).

LR Ministry of Culture, actively participating by implementing long-term strategic plan *Lithuania 2030*, is officially responsible for national policy coordination of creative industries sector. One of the priorities in plan Lithuania 2030 is considered to be creative society, thus cultural and creative industries are particularly important in order to reach this aim.

In 2009 the concept of creative industries was included in Strategy of EU Structural support usage and Economic growth activities programme. By initiating LR Ministries of Culture and Economy was determined to create network of art incubators in Lithuania, which would supplement already acting business incubators and would extend its already provided spectrum of services. The

Ministry of Economy also included creative industries in policy of national innovations, programmes of clustering and export support.

1.3. Lithuanian creative industries actualization in aspect of modern culture and economy

1.3.1. The conception, structure and evolution of creative industries

The area and subjects of creative industries are described in LR Strategy of Promotion and Development of Creative Industries as: the activities which are based on creative skills and talent of individual, which aim and results is intellectual property and which can create material welfare and work places.

The areas of activity which are considered to be activities of subjects of creative industries in Lithuania:

- crafts, architecture; design; cinema and video art; publishing; visual and applied art; music; software and computer services; creation of radio and television programs and broadcasting; advertisement; performing arts; other areas, where aspects of cultural and economic activity are combined.

However, there are problems by describing creative industries or assigning particular activities in Lithuania. Formal enumeration of creative industries activities does not coincide with the list of Lithuanian registered commercial activities (with the CEAA), commercial and non-commercial activities sometimes are inextricably intertwined.

There are widely talks in Lithuania about the creative industries from 2003, when M. Starkeviciute and her colleagues conducted the first researches of creative industries in Lithuania. From 2005 were started development of the first maps of the creative industries (districts of Utena and Alytus).

From 2007 were started wider researches of creative industries in Lithuania (Vilnius academy of art, Siauliai University, University of business and economy, Vilnius Gediminas technical university). In 2008 was created „Association of Creative Industries”, which contains about 40 members (mostly Lithuanian universities, public institutions, private companies providing services in creative industries sector).

1.3.2. Creative industries influence for evolution and relation with other sectors of economy

Influence of creative industries to economy both directly and indirectly:

- direct impact – it can be assessed by measured values, such as work level, contribution to GDP and similar;

- ❑ Indirect economic impact occurs when creative sector influences other social and economic areas of life.

Creative industries can't be assessed separated from other economic sector, because creative industries are characterized in these aspects:

- ❑ creates value-added for other sectors through design, advertisement and branding;
- ❑ are biggest employer of high qualifications persons – in this way creative industries becomes part of economy of knowledge;
- ❑ contributes to the revival of cities and regions;
- ❑ co-operates with various institutions of education;
- ❑ Integrates communities and single peoples.

1.3.2. Promotion of creative industries sectors business: strength, weaknesses, opportunities, threat

Favorable policy for Lithuanian creative business is implemented by LR Ministry of Economy and its governable institutions, but despite positive displacements, the situation of this area is uncertain in context of national business promotion (K-operator, 2012).

Environment of creative industries sector in Lithuania is described by these aspects:

- ❑ Development of information society, the creation of the global market creates favorable conditions for Lithuanian creative products marketing, but also promotes foreign culture's contents penetration into public Lithuanian information area with the help of the internet, cable television and radio.
- ❑ Despite tangible development of creative industries, many inhabitants which realizing creative work and can participate in activity of creative industries development are not inclined to assess the creative activity by economic criteria.
- ❑ By assessing the opportunities of creative industries development in Lithuanian districts, it is observed, that lack of persons with creative qualifications is one of biggest problems of creative industries development, despite the new opportunities for creation of favorable environment for creative activity's, by developing alternative economic activities in villages.
- ❑ The lack of suitable qualification human resources leads to the fact that ideas of creative industries business are realizing slowly.
- ❑ Creator of creative industries production pays too little attention for marketing, image of goods and services and act. (*The Strategy of Promotion and Development of Creative Industries, 2007*).

The strengths of creative industries sector (main aspects):

- ❑ There are productive and developing creative industries sector in Lithuania, its business takes places not only in big country's cities, but also in districts.
- ❑ Growing number of arriving tourists and lengthening their time of visit increases consuming of creative industries products and services.
- ❑ Production of some creative industries areas – theater art, publishing – already now properly represents Lithuanian culture in foreign countries and ect. (*The Strategy of Promotion and Development of Creative Industries, 2007*).

The weaknesses of creative industries sector (main aspects):

- ❑ Poor business skills, economic consciousness of creative industries employees, cultural and art persons.
- ❑ Recently the measures of state support for small and medium business are hard to reach for creative industries because of its specificity.
- ❑ The fragmentation of creative industries, the lack of information and activity's coordination prohibits to use economic and social potential of all sector ect. (*The Strategy of Promotion and Development of Creative Industries, 2007*).

The opportunities of creative industries sector (main aspects):

- ❑ The promotion of creative industries positive influences urban and social evolution, the creation of creative environment attracts investments and other business, which don't belong for creative industries.
- ❑ Effective development of creative industries would help to create and culturally motivate Lithuania representing brands of goods and services, to improve its image. In this way competitiveness of these goods and services would be increased by emphasis Lithuanian content authenticity and uniqueness.
- ❑ Modern information technologies create positive conditions for marketing of Lithuanian creative industries products and services (*The Strategy of Promotion and Development of Creative Industries, 2007*).

The threats of creative industries sector (main aspects):

- ❑ The lack of creativity and its related renewal can create the assumption for stagnation, inability to respond to changing conditions in culture, business and other various areas of country's society life. It properly reduces the opportunities of competitiveness.

- ❑ Faster development of creative industries in other EU countries can reduce Lithuanian competitiveness in EU, determine creative employees emigration to foreign countries and ect. (*The Strategy of Promotion and Development of Creative Industries, 2007*).

1.4. The resources of Siauliai region creative industries sector

1.4.1. Learning opportunities in creative industries sector

Whereas creative industries by its nature are interdisciplinary and comparing new studies program, it is complicated to collect objective statistical data about this program.

There are 7 universities and 4 colleges by its strategies mostly oriented to specialist training for creative industries sector. In Siauliai region there also operates: 1 high education institution of art (Siauliai university (further – SU) Art faculty), 25 secondary and primary mixed and specialized art education institutions, including art gymnasiums, about 15 non-governmental art organizations, children clubs, schoolchildren homes and similar, about 15 cultural centers and cultural homes.

The contextualization of SU Art faculty activity's indicators

There are 6 departments and Art research center in SU Art faculty. The faculty contains 8 first stage and 2 second stage studies programs, 84 employees.

In all departments, posts of lecturers are less, than actually working lecturers. The salaries are insufficient, so lecturers are forced to look for work in other areas; this inevitably particularly influences improvement of studies process. This is the most important issue for departments of Theater, Audiovisual art, Applied art and technologies and Music pedagogy. Another problem in faculty – ageing academic staff.

1.4.2. The resources of creative industries business subjects

According to the Classification of Economic Activities Areas of Lithuanian Department of Statistics (further – CEAA) there are 29 activity's areas, which are attributable to creative industries sector. The companies of Siauliai region creative industries sector operate its activity according to 23 areas of activity (*Table no 1.4.2.1.*).

Most of Siauliai region creative industries sector companies contains *Advertising agencies activity* operating companies – comparing with 2009, 2010 number of these companies increased by 9,8%, but 2011 number of companies decreased by the same percentage and became equal for number of companies in 2008. Although 2008-2009 number of *Advertising agencies activity* operating companies was lower (49-46), but number of its employees (196-197) was higher than 2010-2011. In 2010 in Siauliai region there were 51 companies, which contained 178 employees,

2011 – 49 companies, which contained 170 employees. General turnover of companies comparing with 2010, decreased by 644 764 LTL or 6% in 2011.

The second place according to companies, employees and turnover number in Siauliai region goes to *Architectural activity*. The biggest number of this type of companies and its employees over the past 4 years was recorded in 2008 – 31 companies and 118 employees. In 2010 there were 30, in 2011 – 28 *Architectural activity* operating companies, all of its contained 117 employees. Turnover of companies comparing with 2010, decreased by 2 688 795 LTL or 41% in 2011. The biggest turnover was recorded in 2009, when number of companies and employees was lowest over the past 4 years - turnover reached 13 948 526 LTL and exceeded turnovers of other analyzed periods 26,2% - 72,2%.

Number of Engineering activity and related technical consultancy activity operating companies in 2010 were 20, in 2011 – 22 (mostly during the analyzed period). It contained particularly 178 and 175 employees. The turnover of employees decreased by 98 839 LTL or 1,39% in 2011. Although in 2008-2009 number of companies was lowest (17-16) during the analyzed period, the turnover was biggest during the analyzed period.

Art equipment operation activity operating company's indicators decreased during the analyzed period. In 2010 there were 11, in 2011 – 10 companies, which contained 316 and 281 employees. The turnover of companies comparing with 2010, decreased by 391 187 LTL or 12,23% in 2011.

The biggest negative change of turnover in 2011 was recorded in companies, operating in *Specialized projection activity* - comparing with 2010 turnover of companies decreased by 2 567 844 LTL or 94,10%.

Also big negative changes of companies turnovers in 2011 was recorded in companies operating in *Imitation jewelry and similar article production activity* – turnover decreased by 2 401 723 LTL or 57,79%, also in companies, which main activity is *Sound recording and recorded clips publishing activity* – turnover decreased by 140 629 LTL or 46,57%, in companies operating *Books publishing activity* - turnover decreased by 492 248 LTL or 31,95%. In 2011 particularly decreased number of companies and employees in mentioned Siauliai region creative industries sector areas.

The turnover of companies increased only in 5 activity areas in 2011. The biggest positive change of turnover was recorded in companies operating in *Art creation activity* – turnover increased by 26 399 LTL or 94,62%, but it is important to emphasize, that in 2010 turnover of this area companies reached only 1 500 LTL.

328 997 LTL or 27,80% positive change of turnover was recorded in companies operating in *Data processing, web server services (hosting) and related activity*, although number of companies and employees remained the same.

Table no 1.4.2.1. Indicators of Siauliai region creative industries sector companies' activity in 2008-2011

Ser. Nm.	Name of activity	CEAA 2 edt. code	Number of companies (unit)				Number of employees (unit)				General turnover of companies (LTL)			
			2008	2009	2010	2011	2008	2009	2010	2011	2008	2009	2010	2011
1.	Books publishing	58.11	6	5	5	5	29	25	25	25	2570156	2457434	1540585	1048337
2.	Reference books, catalogs and address lists publishing	58.12	-	-	-	-	-	-	-	-	-	-	-	-
3.	Newspapers publishing	58.13	10	10	10	10	229	247	263	263	12618910	8698746	12852972	11331298
4.	Magazines and periodicals publications publishing	58.14	8	8	8	9	66	65	98	98	3961724	4468577	3486296	3279152
5.	Other publishing	58.19	3	3	3	4	3	3	7	7	487421	678171	436620	607321
6.	Computer games publishing	58.21	-	-	-	-	-	-	-	-	-	-	-	-
7.	Other software publishing	58.29	4	3	2	2	22	15	14	14	1972664	1156518	1162789	1008376
8.	Cinema films, video films and television programs production	59.11	-	-	-	-	-	-	-	-	-	-	-	-
9.	Produced cinema films, video films and television programs artistic design	59.12	-	-	-	-	-	-	-	-	-	-	-	-
10.	Cinema films presentation	59.14	-	-	-	-	-	-	-	-	-	-	-	-
11.	Sound recording and recorded clips publishing	59.20	..	..	2	2	..	..	7	7	..	..	301943	161314
12.	Radio programs broadcasting	60.10	..	..	..	..	..	..	..	..	..	..	..	..
13.	Television programs preparation and broadcasting	60.20	..	..	3	3	..	..	35	35	..	..	1493381	1665300
14.	Computer programming activity	62.01	12	9	9	8	41	29	26	26	1355602	1414982	972209	718256
15.	Data processing, web server services (hosting) and related activity	63.11	4	5	5	5	27	27	21	21	1627183	1650051	854168	1183165

16.	Internet portals services activity	63.12	-	..	..	3	-	..	6	-	..	..	24546
17.	Architectural activity	71.11	31	26	30	28	118	112	117	10292 154	1394 8526	65638 96	38751 01
18.	Engineering activity and related technical consultations	71.12	17	16	20	22	182	177	178	10577 642	1297 8853	71400 22	70411 83
19.	Advertising agencies activity	73.11	49	46	51	49	196	197	178	16755 920	1786 9742	10669 776	10025 012
20.	Specialized projection activity	74.10	5	5	7	3	15	18	16	29090 4	4243 40	27288 00	16095 6
21.	Photographic activity	74.20	8	7	6	7	35	29	24	23072 38	1733 548	96379 0	85673 8
22.	Art creation	90.03	-	-	3	3	-	-	3	-	-	1500	27899
23.	Art equipment operation activity	90.04	12	12	11	10	443	325	316	30786 47	4152 230	31977 88	28066 01
24.	Library and archives activity	91.01	9	9	9	9	535	526	495	36609 87	9238 4	92384	83284
25.	Museums activity	91.02	6	5	5	7	136	132	136	16610 8	2451 90	24519 0	26357 0
26.	Manufacture of hollow glass	23.13	-	-	-	-	-	-	-	-	-	-	-
27.	Ceramic household and decoration products and articles production	23.41	3	3	4	3	164	145	111	46710 52	3906 721	25146 61	21580 19
28.	Manufacture of musical instruments	32.20	-	-	-	-	-	-	-	-	-	-	-
29.	Imitation jewelry and similar article production	32.13	3	3	3	2	111	87	69	30592 68	3867 336	41559 20	17541 97
	Total:		190	175	196	194	2352	2159	2059	2064	580	61374	50079

Source: LR Department of Statistics

... – operates one company according to this activity, therefore because of confidentiality restriction the data can't be presented; - - activity doesn't operate

2. RESEARCH OF CREATIVE INDUSTRIES DEVELOPMENT OPPORTUNITIES IN SIAULIAI REGION

2.1. Characteristic of research method and research participants

Characteristic of research scope

4 objective groups participated in research. Characteristics of the target groups are mentioned below.

Objective group No. 1:

- **Directors of creative industries sector companies.**

Objective group No. 1 consists of directors of Siauliai region companies, which operates in these fields:

- studios of web, advertisement, design;*
- offices of architects;*
- audio/video production companies (audiovisual sector);*
- salons of graphics, art, photography;*
- Companies of press layout.*

Objective group No. 1 consists of 50 respondents.

Objective group No. 2:

- **Directors of art education and culture institutions.**

Objective group No. 2 consists of directors of following Siauliai region art education and culture institutions:

- art schools;*
- specialized schools of music, art, singing;*
- studios of dances, theatre;*
- students' homes and its departments (children's clubs);*
- theaters, concert institutions, art galleries;*

Objective group No. 2 consists of 50 respondents.

Objective group No. 3:

- **Students of art education institutions.**

Objective group No. 3 consists of students of following art education institutions in Siauliai region:

- Art Faculty of Siauliai University.

Objective group No. 3 consists of 100 respondents.

Objective group No. 4:

- **Schoolchildren of art education institutions.**

Objective group No. 4 consists of schoolchildren of following art education institutions in Siauliai city:

- art schools;
- specialized schools of music, art;
- student's homes.

Objective group No. 4 consists of 100 respondents.

Research methods

In order to collect detailed information about situation of Siauliai region creative industries sector subjects, method of questionnaire survey was used. In order to prepare analyze of questionnaire open-ended questions, content analysis method was used.

The questionnaires were disseminated in following ways: the questionnaires were disseminated directly for objective groups No. 3 and No. 4 (students and schoolchildren), for objective groups No. 1 and No. 2 (directors of companies of creative industries sector; directors of art education and culture institution) the questionnaires were disseminated by e-mail or disseminated directly.

Characteristic of research participants - directors of Siauliai region creative industries sector companies. 36 % of research participants were women, 64 % - men. Majority (44 %) of participants concluded respondents, assigned age group 35 – 40, 30 % respondents assigned to age group 30 – 35 m, 18 % respondents - age group 40 – 45, also 6 % respondents - age group <30 and 2 % - age group 50 – 55. 80 % of questioned directors of Siauliai region creative industries sector companies represented limited liability companies, 20 % - individual companies.

Characteristic of research participants – directors of art education and culture institutions. 60% of research participants concluded women, 40% - men. Majority (42%) of participants concluded respondents, assigned age group 45 – 50, 40% respondents assigned to age group 40 – 45, 12% assigned age group 35 – 40 and 2% assigned for each age group: 30 – 35, 50 – 55 , > 55. 30% of questioned directors of Siauliai region art education and culture institutions represented art secondary schools, 10% respondents represented each subject: public organizations and public institutions, 8% respondents represented each subject: music, art schools, cultural centers, 6% - represented art primary schools, 4% - art gymnasiums, 2% - each

subject: galleries, students' homes, dance studios, high education institutions.

Characteristic of research participants – students of Siauliai region art education institutions. 85 % of research participants concluded women, 15 % - men. Half (50%) questioned participants concluded respondents, assigned to age group 19-21, 42% respondents assigned to age group 22-24, 8% - assigned to group 25-27 . 92% of questioned students are studying in first studies stage, 8% - in second studies stage (master). 21% of students indicated *Art* as their study area, 15% - each area: *Audiovisual art* and *Art and design*, 14% - *Music*, 9% - each area: *Environment objects design*, *Creative technologies*, *Stage art*, 8% - *Applied art and business*.

Characteristic of research participants - schoolchildren of Siauliai region art education institutions. 77% research participants concluded women, 23% - men. More than half (54%) questioned schoolchildren concluded respondents, assigned to age group 15 -17, 40% respondents assigned to age group 12-14, 5% - assigned age group 18-20, 1% - assigned to age group 9-11. 46% questioned schoolchildren are attending classes of 9-10 in secondary schools, 25% - are attending classes of 6-8, 17% - classes of 11-12, 12% - classes of <6. Half (50%) questioned schoolchild *Art* as their area of art education indicated, 27% - *Music*, 8% - each area: *Dance*, *Expression* (mixed art activity), 7% - *Performance*.

2.2. Siauliai region creative industries sector: analysis of employees

2.2.1. Analysis of employees number in creative industries sector companies

This part of feasibility study was aimed to analyze demand and indicators of number of general and qualified art specialists, dynamics of these indicators over the next years, lack of particular art areas specialists in modern companies, operating activities at creative aspect.

Almost quarter (38%) of Siauliai region creative industries sector companies' *general number of employees* consists of 6-10, almost in third (28%) companies - ≤ 5 employees. Only small part (12% and 8 %) questioned companies directors indicated, that *general number of employees* in their companies contains bigger indicators - 11-15 and 16-20 employees.

Received results of the research allows to submit presumption, that most companies in Siauliai region creative industries sector are micro-companies – this factor reduces opportunities of employment to qualified art area specialists.

Results of the research shows, that in majority (74%) studied companies of Siauliai region creative industries sector there are ≤ 5 *qualified art area specialists*, and only 26% questioned companies directors indicated, that number of *qualified art area specialists* in their companies contains 6-9.

Table no 2.2.1.1. Distribution of qualified art area specialists and general employees number in companies of Siauliai region creative industries sector, n=50

General number of employees in company, unt.	Number of qualified art area specialists in company, unt.
3-5	1-3
6-10	2-3
11-15	4-5
16-20	4-6
21-25	5-9

In table no 2.2.1.1. there is presented distribution of qualified art area specialists and general employees number in companies of Siauliai region creative industries sector. The presented data shows that in companies, which general number of employees contains 3-5, at least 1 qualified art area specialist is working, and in companies, which total contains 21-25 employees, at least 5 and at most 9 art area specialists are working.

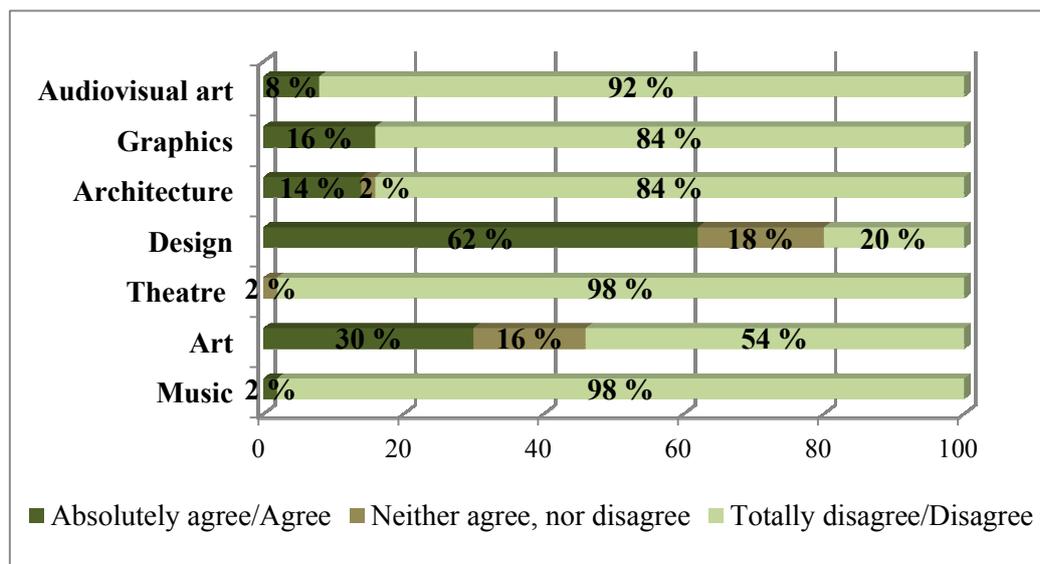


Figure 2.2.1.1. Directors opinion about demand of qualified specialists of particular art areas in creative industries sectors companies, (n=50)

By the research was reached to find out the demand of particular art areas specialists in companies of Siauliai region creative industries sector. The data in figure 2.2.1.1. allows to predicate, that the biggest demand in companies is for *Design* specialists – positive pronounced 62% questioned companies directors, also 30% of directors agreed with the lack of *Art* specialist in their companies. However they pronounced very small demand of *Audiovisual art* (8%), *Music* (2%), *Theatre* (2%) specialists.

Also it was reached to find out changes prognosis of general number of employees in Siauliai region creative industries sector companies. Summarized data of the research turned out, that more

than half of (58%) respondents prognosticates, that *general number of employees will not change over the next 5 years in their companies*. Only 34% of respondent's pronounced positive that *general number of employees will grow a bit over the next 5 years*.

Over the past 2 years in Siauliai region creative industries sector, number of employees increased only in companies, operating activities according to 4 CEAA areas of activity (*table no 1.4.2.1.*) it is only 26% of all companies of Siauliai region creative industries sector. Number of employees decreased in 48% companies in 2011, however in other companies - remained the same.

Mentioned indicators notes, that in order to increase economic, cultural and social value-added, which are created by creative industries sector, it is necessary to characterize demand of employees in separated regions.

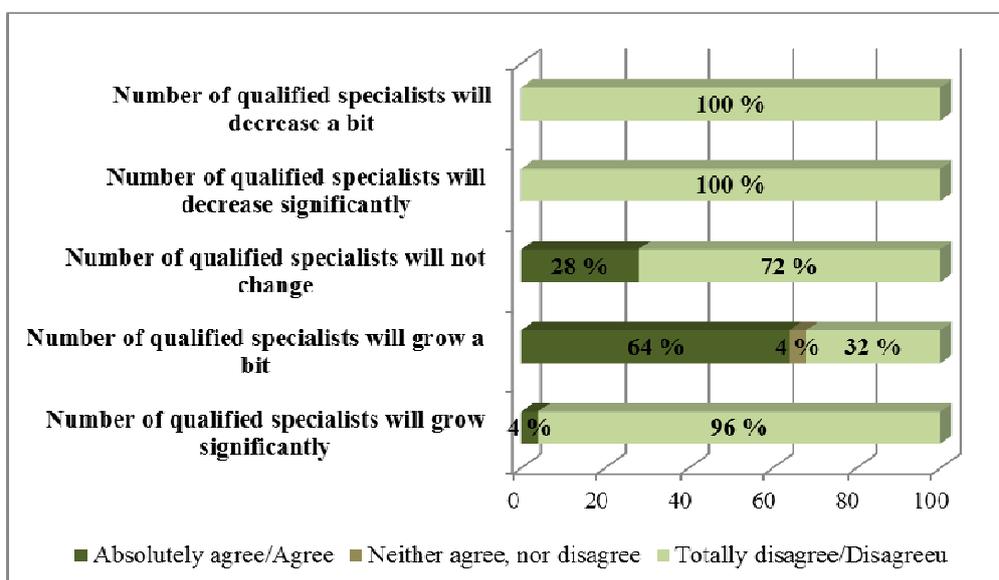


Figure 2.2.1.5. Opinion of Directors of companies of creative industries sector about change of qualified specialists number over the next 5 years, n=50

The results of the research revealed opinion of directors of Siauliai region creative industries sector companies about change of qualified specialists' number in their companies over the next 5 years. The data presented in *figure 2.2.1.5.* shows that more than half (64%) of companies directors prognosticates, that *over the next 5 years qualified art area specialist number will grow a bit*. Only 28% of respondents indicated that *number of specialists will not change*.

Received data of the research allows predicating, that more significant positive changes of employees number in business subjects Siauliai region creative industries sector is unexpected over the next 5 years. Mentioned insight is especially unfavorable in aspect of qualified art area specialists integration to labor market, also it can promote specialists emigration to other regions or foreign countries.

2.2.2. Employees number analysis of art education and culture institutions

This part of feasibility study presents data of the research, revealing demand of employees in Siauliai region art education and culture institutions. The aim of this point was to analyze indicators of demand of general and qualified art area specialists, its dynamics over the coming years and lack of particular specialists in modern institutions.

The data shows, that general number of employees in Siauliai region art education and culture institutions, differently than in creative industries sector companies, is much differentiated. It can be influenced by Siauliai region geographic and demographic indicators (Siauliai city contains biggest area, number of inhabitants in all district). The data shows that in 22% of institutions general employees' number contains 26-30, 12% - 41-45 employees.

Results of the research revealed, that in 24% of Siauliai region art education and culture institutions qualified art areas specialists number contains ≤ 5 employees, 22% - 21-25. Number of specialists in art education and culture institutions is also quite strongly differentiated.

Table no 2.2.2.1. Distribution of qualified art area specialists and general employees number in Siauliai region art education and culture institutions, n=50

General number of employees in institution, unit	Number of qualified art area specialists in institution, unit
6-10	1-3
11-15	2-5
16-20	5-9
21-25	4; 17
26-30	10-22
31-35	12-24
36-40	23-31
41-45	30-34
46-50	24-37
56-60	48
61-65	52
76-80	47
81-85	71

In table no 2.2.2.1. there is presented distribution of qualified art area specialists and general employees number in Siauliai region art education and culture institutions. The data of the research shows, that in institutions, which general number of employees contains 6-10, at least 1 qualified art area specialist is working, and in institutions, which total contains 81-85 employees, 71 art area specialists are working.

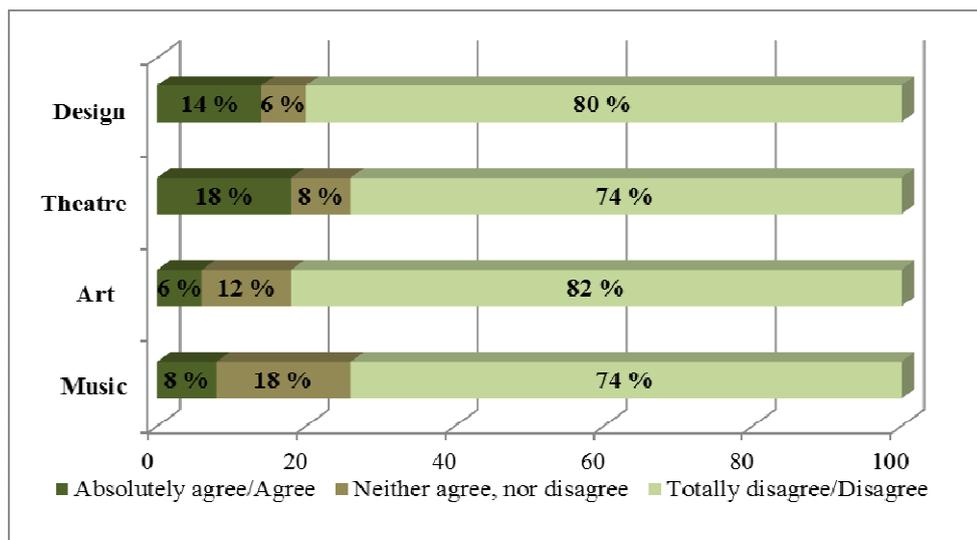


Figure 2.2.2.3. Opinion of directors of art education and culture institutions about demand of qualified specialists of particular art areas, (n=50)

It is felt slight demand of *Theater* and *Design* specialists in Siauliai region art education and culture institutions (it was actualized particularly by 18% and 14% respondents), meanwhile the demand of *Design* specialists is several times higher in creative industries sector companies.

But only a few (6%) directors of institutions emphasized demand of Art specialists, although 30% of companies' directors' lack of Art specialist indicated.

Unlike the directors of creative industries sectors companies, directors of art education and culture institutions don't actualize demand of *Audiovisual art*, *Graphics* and *Architecture* specialists. Results of the research shows, that in half (54%) of questioned art education and culture institutions *general number of employees will not change over the next 5 years*.

In almost quarter of institutions general number of employees will change a bit – creative industries sectors companies directors opinion was very similar on these issues.

The data of research allows predicating, that more significant change of total number of employees isn't foreseen in institutions.

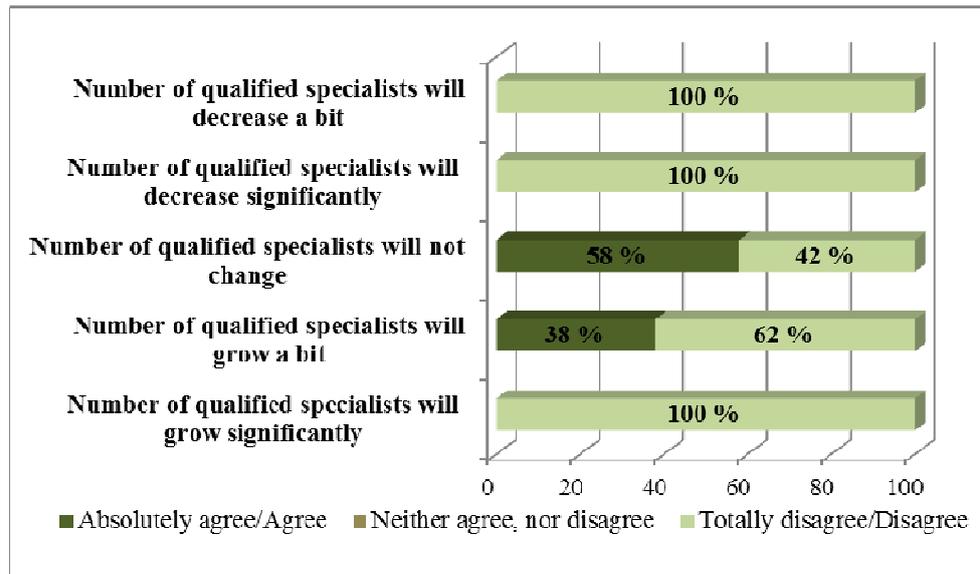


Figure 2.2.2.5. Opinion of directors of art education and culture institutions about change of qualified specialists number over the next 5 years, n=50

After analyzing data about qualified specialists demand in art education and culture institutions it turned out, that 58% of institutions directors prognosticates, that number of qualified specialists will grow a bit over the next 5 years (figure 2.2.2.5.) - meanwhile only 28% of directors of companies of creative industries sectors agreed with this proposition in their case. 38% of institutions directors agreed that number of specialists will not change – meanwhile even 64% of companies’ directors pronounce positive about that in their case.

The data of the research allows to predicate, that more significant change of specialists number in Siauliai region art education and culture institutions isn’t foreseen, which again may influence the emigration flows of Siauliai region qualified art area specialists.

2.3. Analysis of activity’s opportunities of business, education and culture subjects in Siauliai region creative industries sector

2.3.1. Most relevant problematical areas and motivation to expand activity in creative industries sectors companies

In this section there are presented summarized research data about problematical aspects which Siauliai region creative industries sector companies occurred. The aim was to find out the most relevant problematic aspects, to characterize companies’ plans to expand scope of activities over coming years.

Results of the research revealed, that more than half (52%) of companies participated in research agreed, that their companies activity is negative influenced by *lack of qualified specialists*, 36% of questioned respondents pronounced without opinion on this question.

However, most respondents (70%) didn't agreed with proposition, that their companies *relations with other similar institutions are weak* – it can be interpret as one of the conditions for creative industries sector development alternatives (co-operating companies gives opportunities to prepare wider business projects).

It was researched, how directors of creative industries assess their plans to expand the scopes of companies' activity. It turned out, than more than quarter (44%) of creative industries sector companies *are planning to expand the scopes of activity*. 32% of directors pronounced without opinion on this question.

Companies' directors were asked to base their opinion on mentioned question. Their plans to expand, perhaps expand, won't expand based only 60% of questioned directors. This indicator would let to predicate, that relatively large part (40%) of companies directors don't have clear vision on companies' development, vaguely understands which factors positive or negative influences companies development.

Directors emphasized the most concrete companies' sectors development, as criterion of plans to expand activity: *„Will be expanded silkscreen activity...“*, *„Customers flow is growing, we will expand services visual advertisement...“*, and *„In future we foresee to open one more department of art decor.“*

Companies' directors also emphasized criterions – productions innovations: *“New equipment...”*, *“We will purchase equipment...“*, and renewal of qualifies labor market – *„...to hire more employees“*, *„We are getting enough orders, so we could to hire one more specialist.“*

Data of the research revealed, that similar size respondents groups (companies' directors) relates their plans don't expand companies activity in the near future with 2 criterions - low offer of products: *„Company is small, so staff is enough according recent orders.“*, *„Lack of customers flow...“*, problematical country's economic situation: *„...difficult recovery of economy, in turn influences the business of creative industries“*.

2.3.2. Most relevant problematical areas and motivation to expand activity in art education and culture institutions

In this section the goal was to find out the most actual problematical areas of art education and culture institutions, to characterize institutions plans to expand scope of activities over coming years.

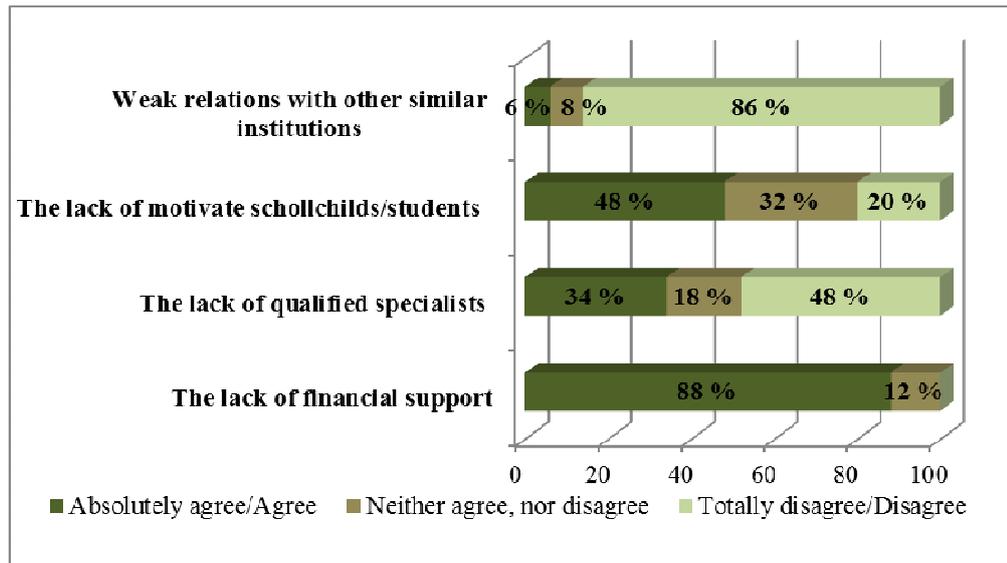


Figure 2.3.2. Problematic issues faced by the directors of art education and culture institutions, (n=50)

The study identified that mostly art education and culture institutions face with *the lack of financial support* – the data in *figure 2.3.2.1.* shows that with this proposition agreed 88% of questioned directors. 48% of respondents actualized *the lack of motivate schoolchildren/students* as problematical institutions area, also 32% of respondents pronounced on this item without opinion.

More than half (62%) of art education and culture institutions directors predicated that they are not planning to expand activity's scopes in near future, also 36% of respondents pronounced without opinion on mentioned point.

Institutions directors were asked to base their opinion on mentioned question. The plans to expand, perhaps expand, won't expand based only 22% of questioned institutions directors. This indicator would let to predicate, that majority (78%) of questioned directors don't have clear development vision for their institutions.

Respondents which based their opinion *to expand* their institutions activity actualizes development vision without concrete constructs: „Yes we will reach status of gymnasium...“, „School will be expanded – it will become long term secondary school. “.

Respondents which based their opinion *don't expand* institutions activities actualizes problematical financial base: „Lack of funding...“, „We don't get fund...“, and managing institution influence: „Our activity depends on local municipality...“, „Institution's funding is reduced significantly.“.

2.4. The growth dynamics of art activity in creative industries sector

2.4.1. Creative industries sector companies directors prognosticated the most perspective art areas at labor market aspect

In this part of feasibility study there are characterized prognoses about the most perspective art areas over the next 5 years at labor market according to opinion of creative industries sector companies' directors. The study helped to find out, how potential employer assesses employment opportunities of particular art areas specialists.

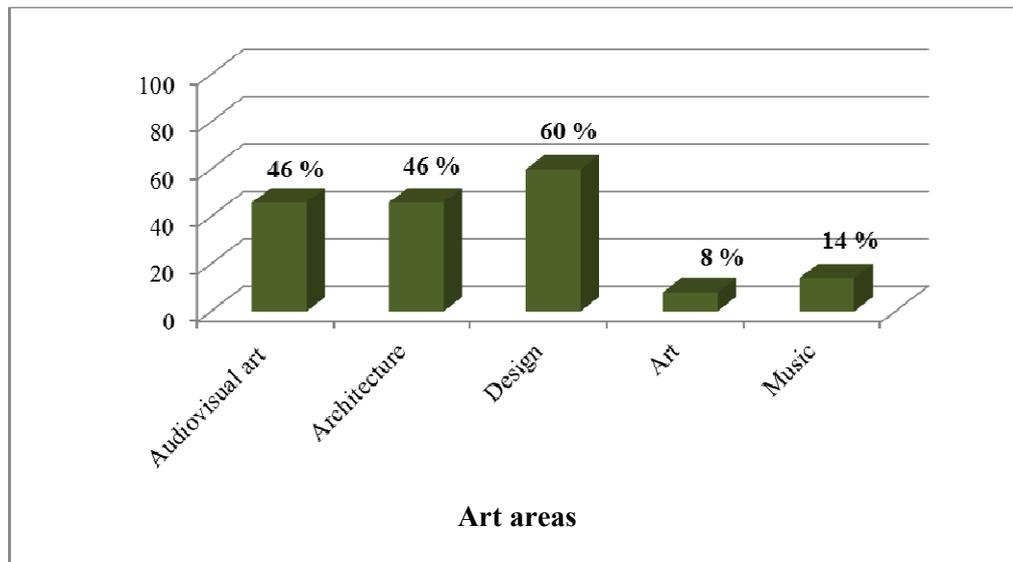


Figure 2.4.1.1. *Siauliai region creative industries sector's companies directors prognosticated the highest demand having art areas over the next 5 years, n=50*

Data of the research revealed, than more than half (60%) of Siauliai region creative industries sector companies directors prognosticates, that the most perspective art areas over the next 5 years will be *Design*, also *Architecture* and *Audiovisual art* – about each areas positively pronounced 46% of respondents.

Part of respondents identified the most perspective art branches: *Graphics* – positive pronounced 20% of respondents, *Interior design* - 16% of respondents.

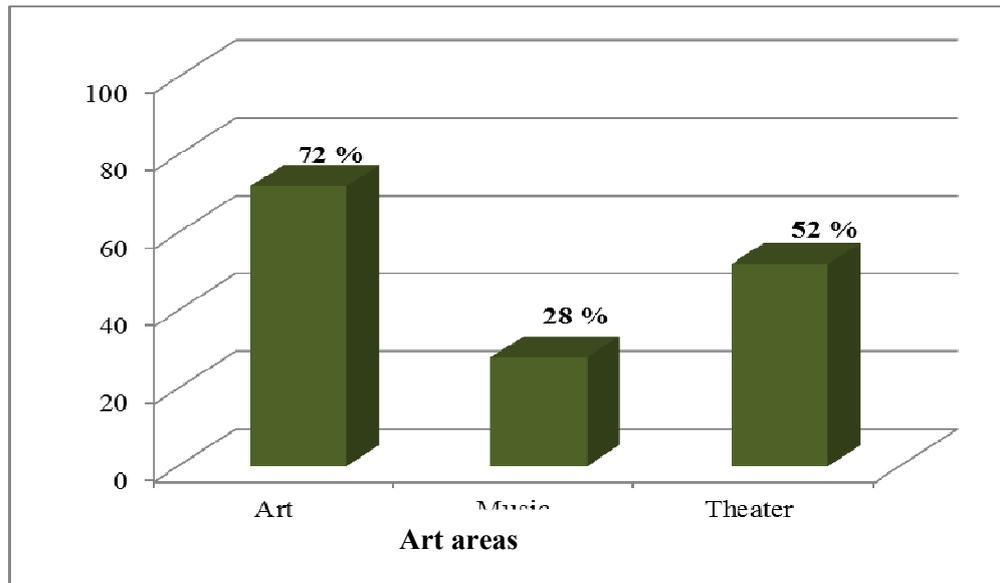


Figure 2.4.1.2. *Siauliai region creative industries sector's companies directors prognosticated the lowest demand having art areas over the next 5 years, n=50*

Even 72% of questioned creative industries sector companies' directors characterized *Art* as lowest demand having art area at labor market, 52% - *Theater*. Small part of respondents identified the most perspectives art braches: *Symphonic music* – positive pronounced 6% respondents.

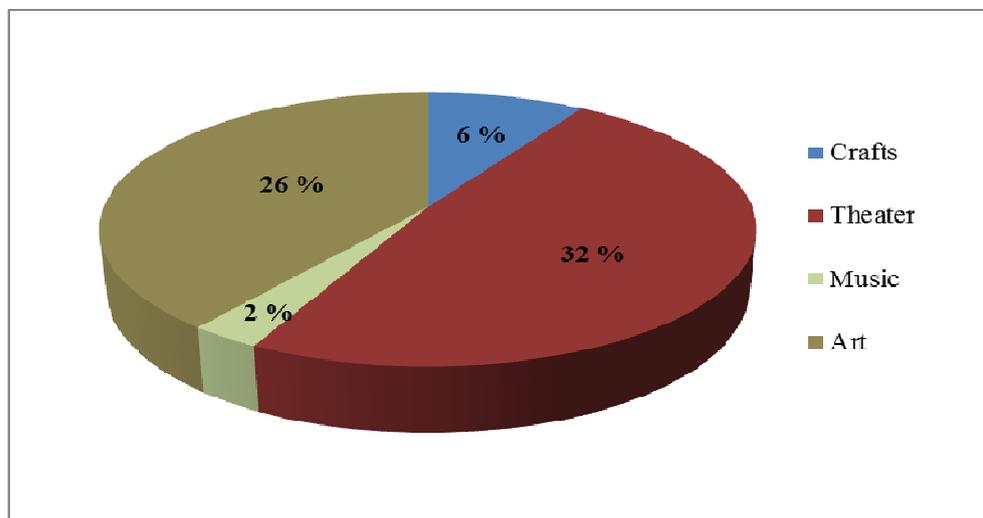


Figure 2.4.1.3. *Siauliai region creative industries sector's companies directors opinion about art areas, which adaptation in modern labor market is the most complicated, n=50*

The participants of the research were asked to identify art area, which adaptation is the most complicated in modern labor market - third (32%) of companies' directors indicated *Theater*, 26 % - *Art*.

2.4.2. Art education and culture institutions directors prognosticated the most perspective art areas at labor market aspect

In this part of feasibility study there are characterized art education and culture institutions directors prognosis about the most perspective art areas over the next 5 years at aspect of labor market. The results show potential employers assess of particular art areas specialists opportunities of employment.

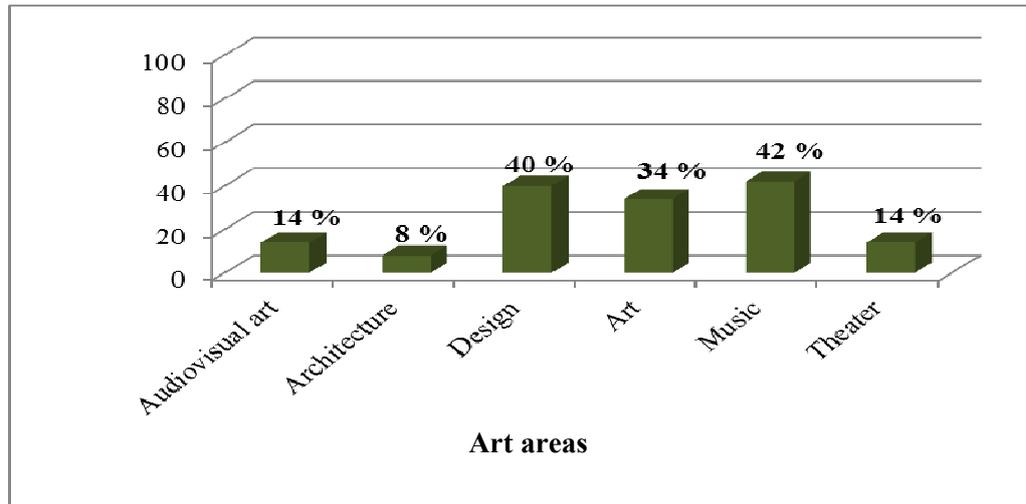


Figure 2.4.2.1. *Siauliai region art education and culture institutions directors prognosticated the highest demand having art areas over the next 5 years, n=50*

Quarter (40% and 42% respondents) of art education and culture institutions directors prognosticates, that over the next 5 years the highest demand will have these art areas: *Design* and *Music* (figure 2.4.2.1.). More than third respondents (34%) pronounced *Art*.

Almost third (28%) of Siauliai region art education and culture institutions directors indicated *Theater* and 18% of respondents indicated *Art* as lowest demand in labor market having art areas over the next 5 years.

Directors' opinion in pronouncing art areas having lowest demand in near future, distributed like this: 24% of respondents indicated *Dance*, 8% - *Crafts*.

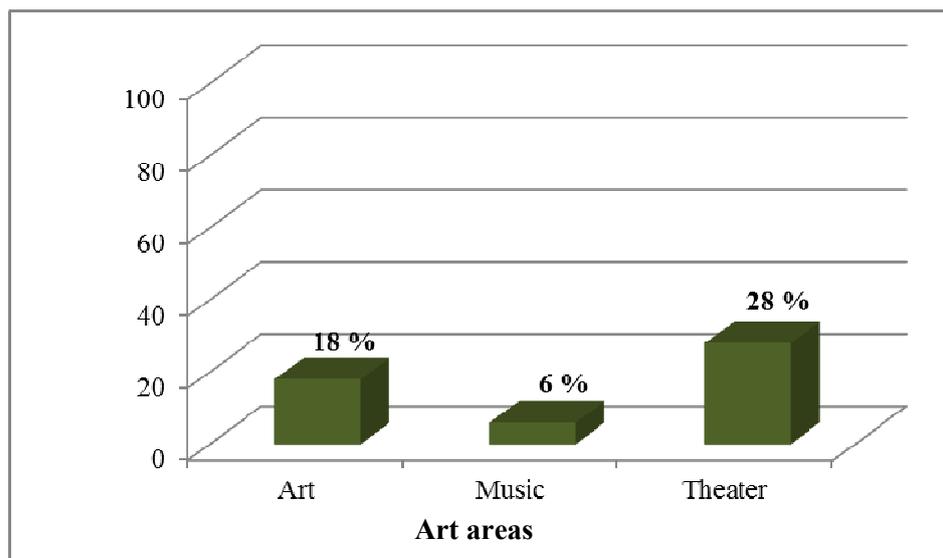


Figure 2.4.2. Siauliai region art education and culture institutions directors prognosticated the lowest demand having art areas over the next 5 years, (n=50)

Directors of Art education and culture institutions were asked to identify art area, which adaptation in modern labor market is the most complicated. Small part of respondents presented their answers – only small part (4%) of respondents pronounced each area: Music, Dance, and 2% - pronounced *Theater*.

2.5. Causality analysis of problematical aspects which creative industries subjects have to face

2.5.1. Assessment of situation: contextualization of directors' opinion on creative industries sector companies

Based on research data in this section was reached to analyze, how Siauliai region creative industries sector subjects (companies) assess development opportunities and influence factors for operating creative activity.

Directors of companies in Creative industries sector were asked to pronounce about economic-social situation in Lithuania according to aspect of creative industries development. The data shows that more than half (58%) of researched participants assess situation as *satisfactory*. Equal respondents groups assessed situation as *good* or *bad* (22% and 20%).

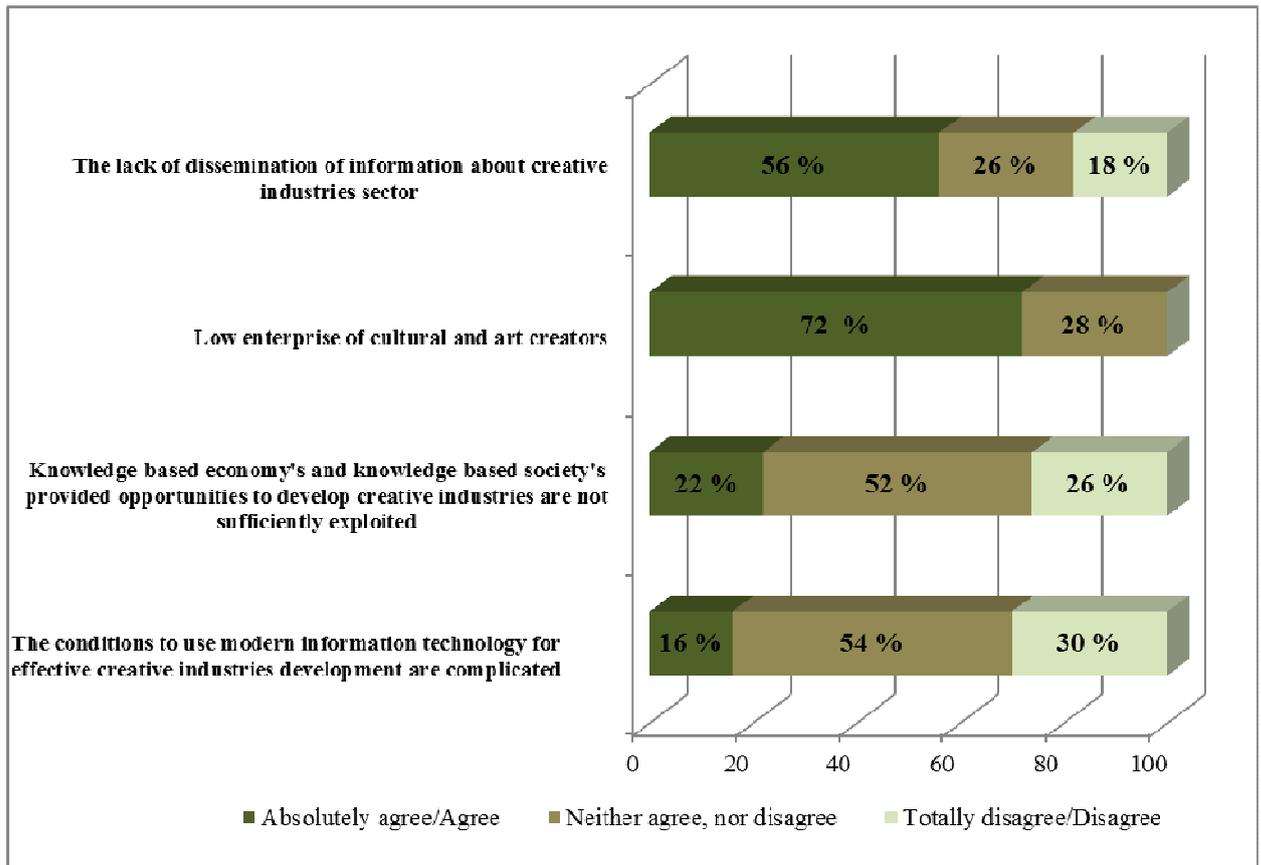


Figure 2.5.1.1. Opinion of Siauliai region creative industries sector's companies directors about opportunities of creative industries development in Lithuania, n=50

Companies' directors were asked to pronounce about propositions on creative industries sector development opportunities in country.

It turned out that even 72 % of creative industries sectors companies directors pronounced negative about *enterprise level of cultural and art creators* as one of problematical aspects of creative industries. Also, more than half (56 %) of respondents pronounced negatively about *sufficiency of information on creative industries sector* (figure 2.5.1.1.).

Half of research participants (52% and 54%) particularly pronounced without opinion about propositions: *knowledge-based economy's and knowledge-based society's provided opportunities to develop creative industries are not sufficiently exploited*, and *the conditions to use modern information technology for effective creative industries development are complicated*.

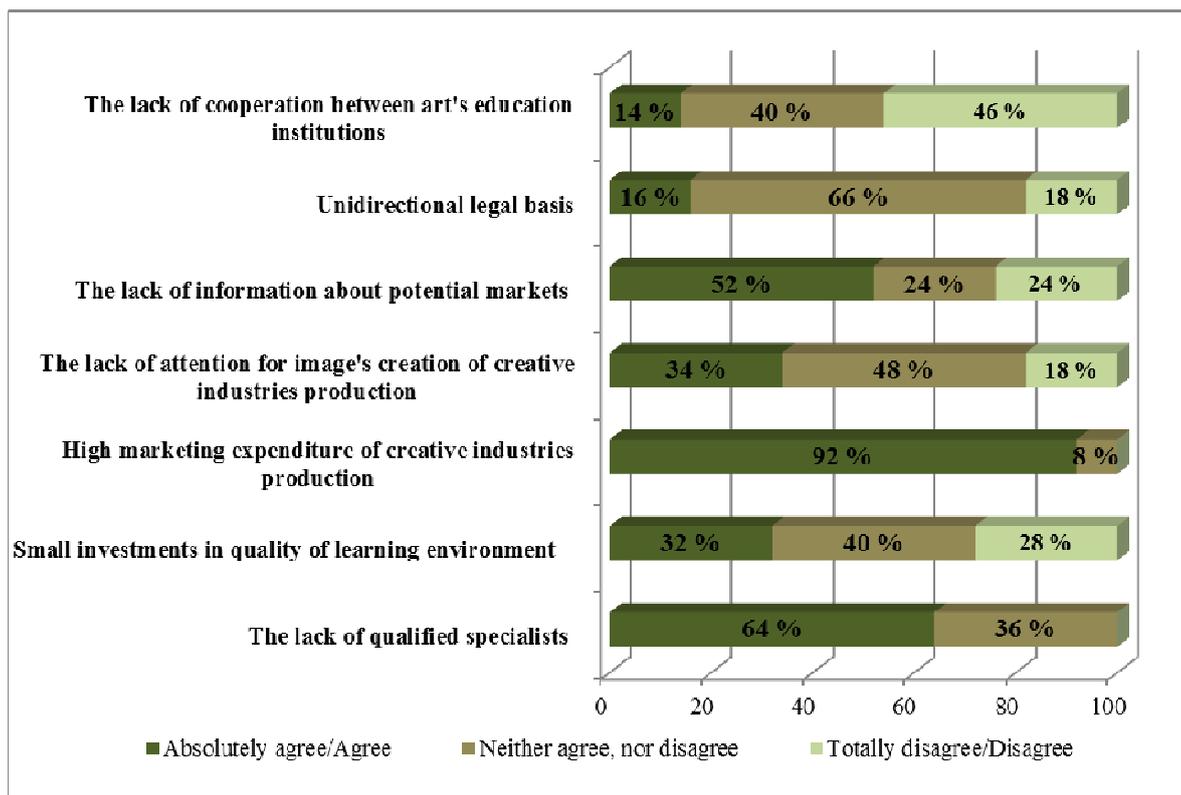


Figure 2.5.1.3. Siauliai region creative industries sector's companies directors opinion about factors, which negatively influence the development of creative industries, n=50

Data presented in *figure 2.5.1.3.* reveals which factors are negative influencing creative industries development and are actualized by directors of creative industries companies.

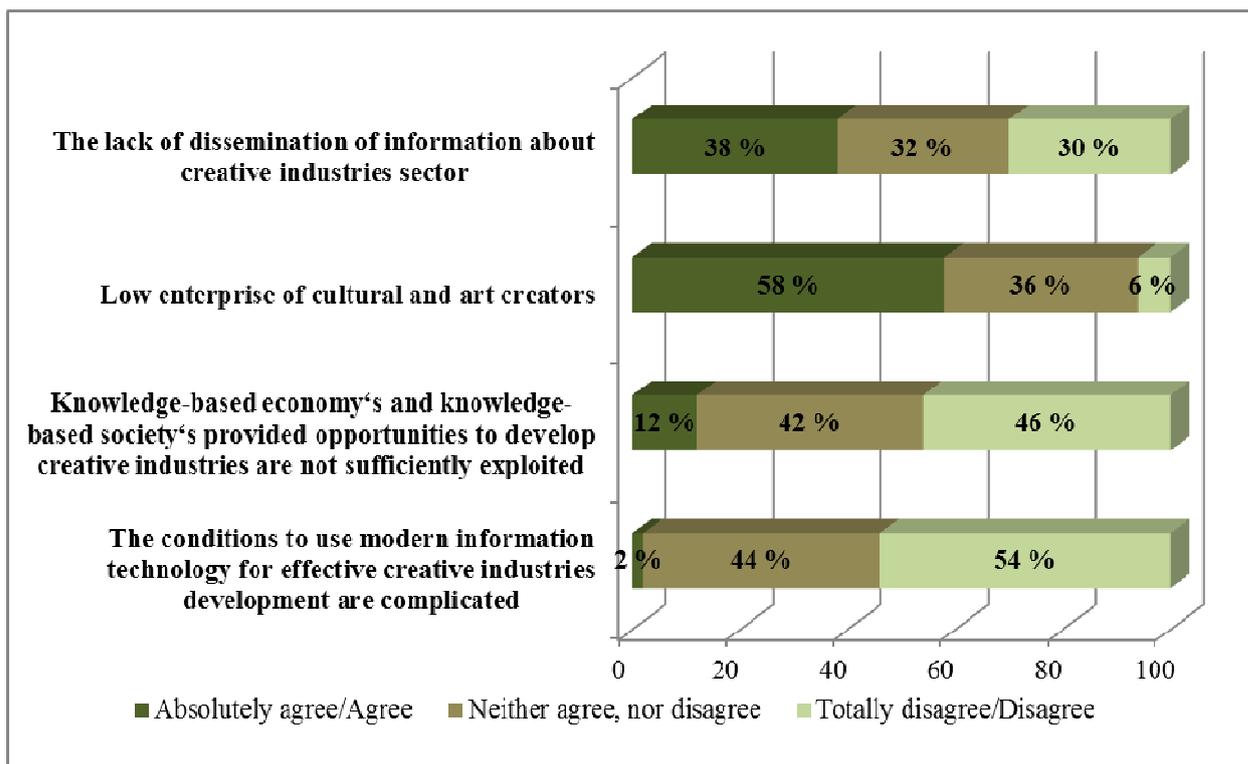
Data of the research shows that majority (92%) of research participants agrees that *marketing expenditure of creative industries production are high*, 64% of respondents actualizes *the lack of qualified specialists*, 52% - *the lack of information about potential markets*.

68% of respondents pronounces without opinion about *unidirectional legal basis*, also 48% presented the same opinion – *the lack of attention for image's creation of creative industries production*.

2.5.2. Assessment of situation: contextualization of directors opinion of art education and culture institutions

This section analyzes how subjects of Siauliai region creative industries sector (art education and culture institutions) assess development's opportunities and influence's factors for operating creative activity.

Received data of the research allows predicating, that more than half (58 %) of questioned respondents assess satisfactory economic-social situation in aspect of creative industries development. It is important to emphasize that 42 % of institutions directors describes the situation as *good*.



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Figure 2.5.2.2. Opinion of Siauliai region art education and culture institutions directors about opportunities of creative industries development in Lithuania, n=50

Directors of art education and culture institutions were asked to pronounce about propositions on creative industries development opportunities. Data presented in figure 2.5.2.2. allows to predicate, that more than half (58%) of directors actualizes *low enterprise of cultural and art creators* as problematical aspects, also 36% of respondents pronounced about this item without proposition. Almost quarter (38%) of respondents agrees, that *dissemination of information about creative industries sector is insufficient*.

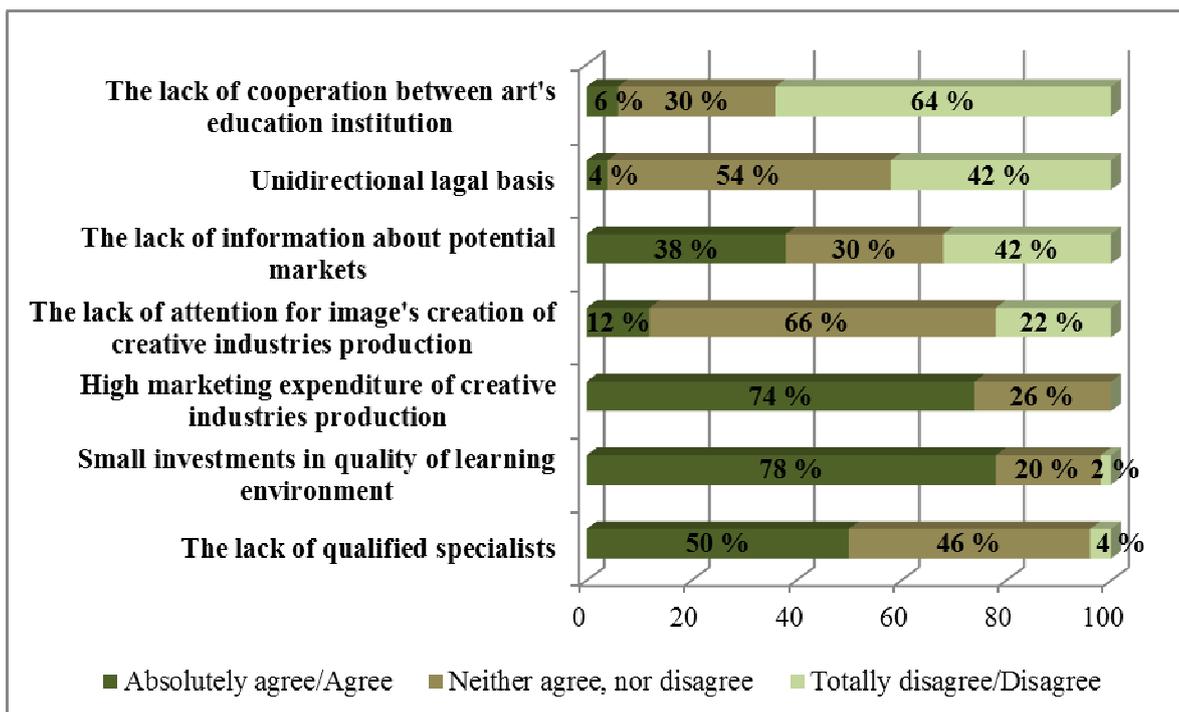


Figure 2.5.2.3. Opinion of Siauliai region art education and culture institutions about factors, which negatively influence the development of creative industries, n=50

The data of research revealed the aspects, of how directors of art education and culture institutions characterize the factors, which negatively influence development of creative industries.

The data presented in *figure 2.5.2.3.* shows, that majority (78% and 74%) of respondents identifies *small investments in quality of learning environment* and *high marketing expenditure of creative industries production* as actual factors. Half of respondents (50%) emphasizes *the lack of qualified specialists*.

66% of respondents pronounced without opinion about proposition – *the lack of attention for image's creation of creative industries production*. The same position of opinion neither agrees, nor disagrees was pronounced by 54% of respondents concerning statement – *unidirectional legal basis*.

2.6. Education demand and employment opportunities in Siauliai region creative industries sector

2.6.1. Causality analysis of studies choice in art area

In this sector there are presented the data about motivation to choose art area studies among Siauliai region art area education institutions students. The aim was to describe, how potential qualified specialists characterizes their solutions of choice of studies specialization.

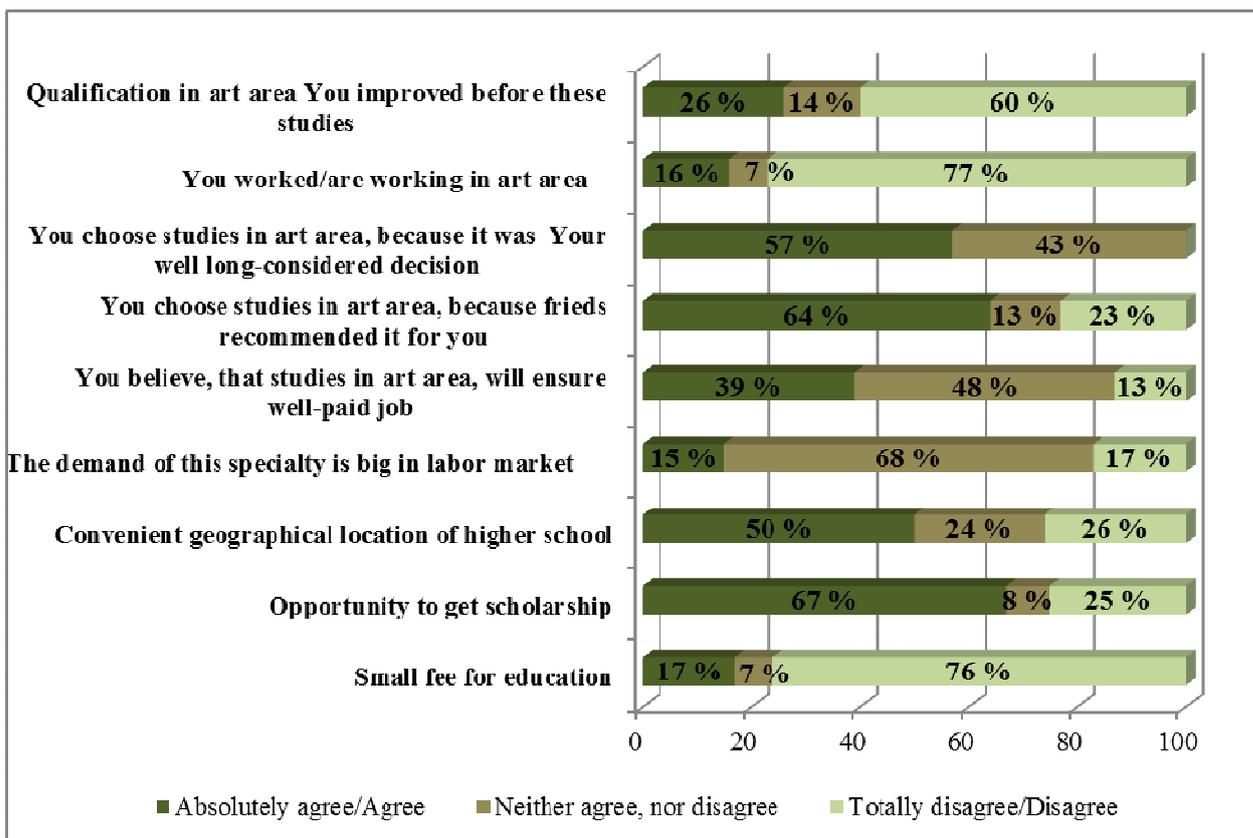


Figure 2.6.1.1. *Siauliai region Art area's education institutions students motives to choose studies in art area, (n=100)*

Data in figure 2.6.1.1. shows that similar size respondents groups (67% and 64%) indicated *recommendation of friends, familiar* as motives to choose studies in art area. Only 57% of questioned students indicated have chosen these studies because *it was their well long-considered decision*.

It is important to emphasize, that 39% of students predicated *believing, that art area studies will ensure well-paid job for them*, small part of respondents (only 26% and 16%) emphasized, that *qualification in art are they improved before these studies*. That the *demand of this specialty is high in labor market* – agreed only 15% questioned students, big part of respondents (68%) pronounced without opinion about this issue.

2.6.2. Causality analysis of art area lessons choice

This part of feasibility study presents characteristics of motivation to choose art area lessons of Siauliai region art education institutions schoolchildren. It was reached to describe the cause of choice, to characterize emotions, which schoolchildren experiences during the lessons.

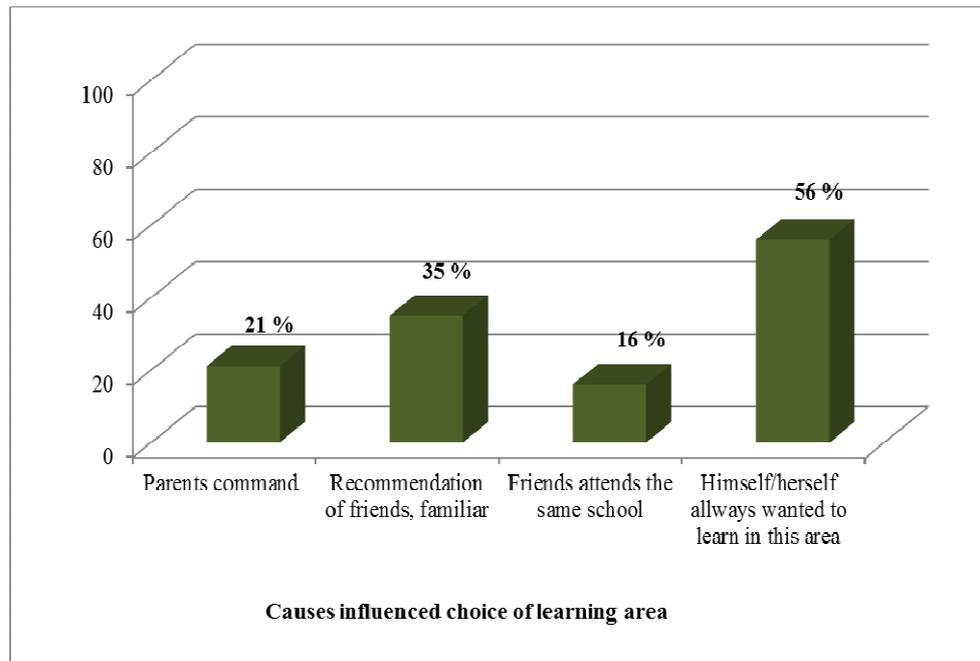


Figure 2.6.2. Opinion of Siauliai region art education institutions schoolchildren about causes, which influenced choice of particular learning area, n=100

The data of research (figure 2.6.2.1.) allows to predicate, that more than half of questioned schoolchildren have chosen lessons in art education school guided by their own desire - 56% schoolchildren indicated, that chosen these lessons, because they always wanted to learn in this area. More than third schoolchildren indicated, that choice of these lessons was influenced by recommendation of friends, familiar.

Despite the diversity of opinion about motives of art lessons choice, majority (71%) of Siauliai region art schools pupils indicated, that they like very much learning according to selected area (figure 2.6.2.2.).

The schoolchildren of art education institutions were asked to base, why they likes/dislikes to learn according to selected art area. The answers, basing positive opinion about lessons, presented 85% of questioned schoolchildren. Similar sized (28% and 27%) respondents groups indicated these arguments: opportunity to improve, express them selves and it's my hobby. The answers basing negative opinion about lessons was indicated by 15% of questioned schoolchildren. Indicated causes were: its takes a long time and it is not for me.

The schoolchildren were asked to pronounce about proposition – vision to work according to selected art area in the future. Half of respondents pronounced without opinion, positively pronounced only 19%, other part pronounced negative.

The schoolchildren were asked to argue, why they would like/wouldn't like working according selected art area. The arguments were indicated by 79% of questioned schoolchildren. 28% of

respondents based interest to enter in the creative industries labor market. 51% of respondents pronounced negative wish to work in art area in the future.

2.7. Potential and learning environment of Siauliai region creative industries sector qualified specialists

2.7.1. Assessment of situation: opinion of Siauliai region art education students

In this sectors there is characterize, how students of Siauliai region art area’s high education institutions assess learning environment, actualize interest to continue studies. It was reached identify students expectations and achievements.

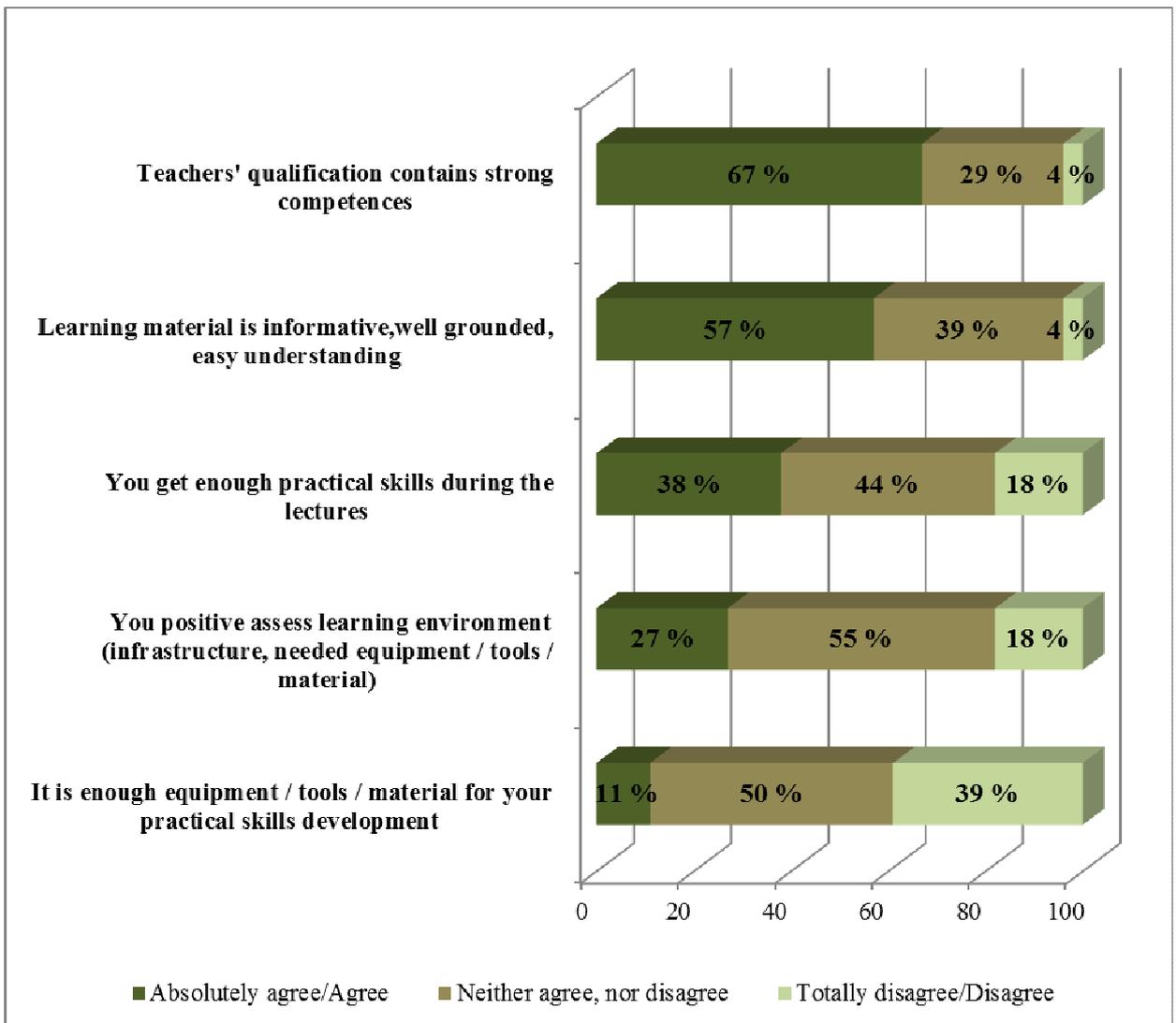


Figure 2.7.1.1. Opinion of Siauliai region art area’s education institutions students about learning environment, (n=100)

Most of questioned students assesses *teacher’s work* positive – most of students (67%) agreed, that *teacher’s qualification contains strong competences*. However only just quarter (38%) of students get *enough practical skills during the lectures* and also only just third (27%) assesses

positively *learning environment (infrastructure, needed equipment/tolls/material*. Only 11% agreed and 50% pronounced without opinion *about sufficiency of equipment/tools/material needed development of practical skills*.

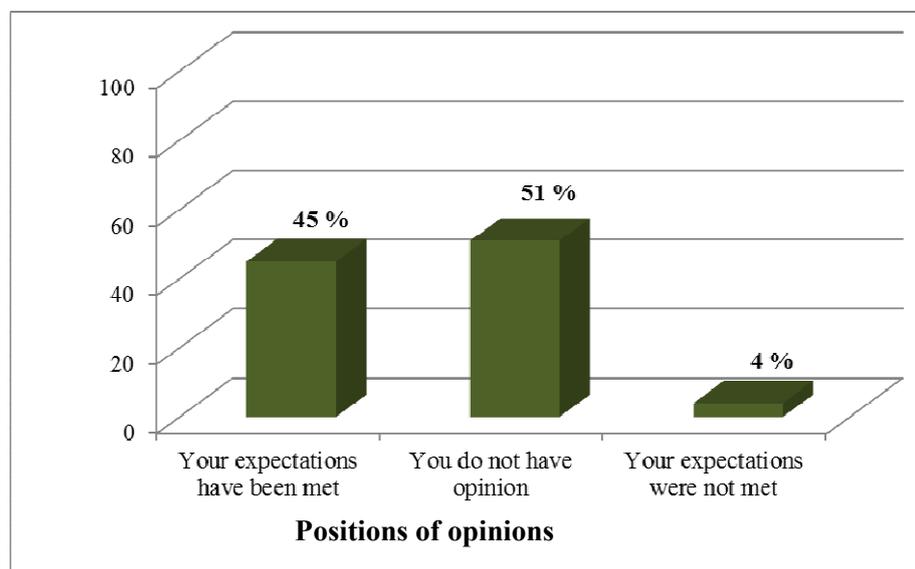


Figure 2.7.1.2. *Opinion of Siauliai region art education institutions students about expectations at studies aspect, n=100*

data received in this research allows to predicate, that almost half (45%) of art area's students in Siauliai region high education positively pronounce about expectations of studies choice (*figure 2.7.1.2.*). But it is emphasized, that similar size (51%) of respondents pronounced without opinion about this issue.

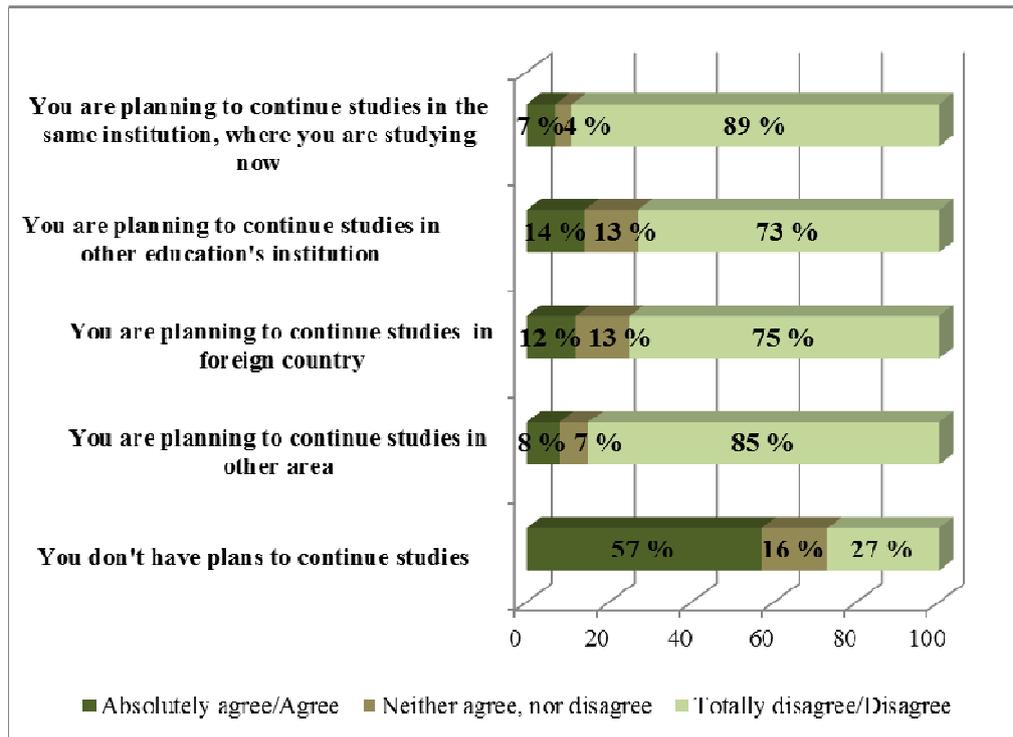


Figure 2.7.1.3. Siauliai region art area's education institutions students opinion about plans to continue studies, n=100

More than half of questioned respondents are not interested in their qualification improvement - 57% students indicated *don't planning to continue studies* (figure 2.7.1.3.). Only 7% of questioned students are planning to continue studies *in the same institution, where they are studying now*. Also 4% pronounced without opinion.

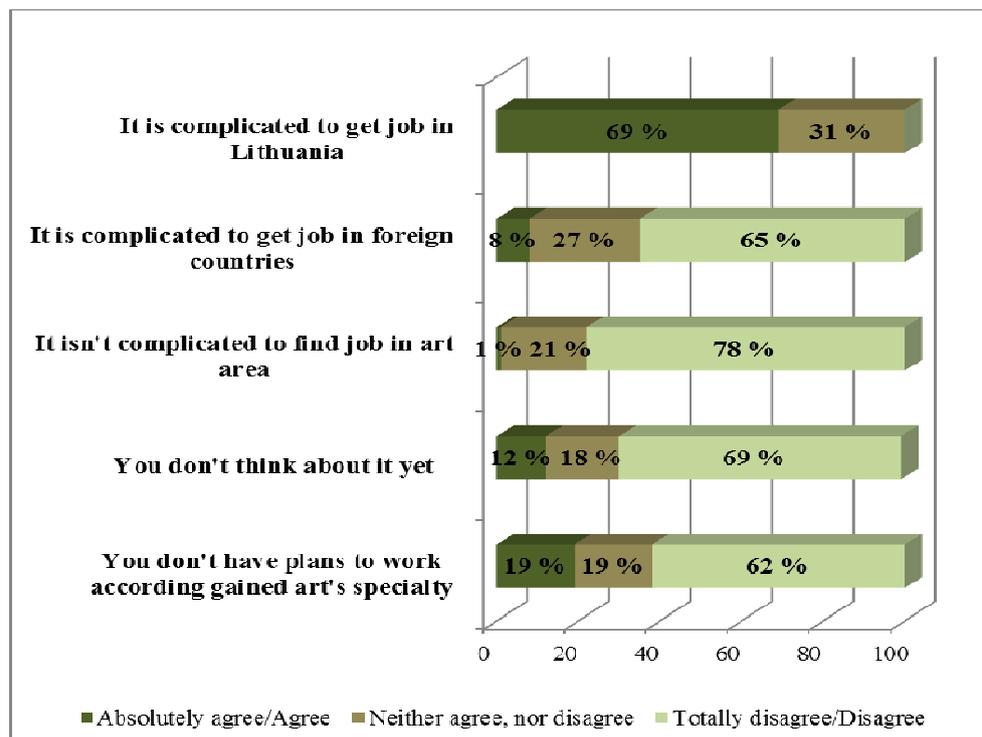


Figure 2.7.1.4. *Opinion of Siauliai region art area's education institutions students about opportunities to get job in modern conditions of labor market, n=100*

Most of Siauliai region art education institutions students are interested in work in creative industries sector – 62% denied proposition, that they aren't planning *to work according gained specialty*.

However 69% of questioned respondents agreed, that *it is complicated to get job in Lithuania at modern conditions of labor market*, but similar sized group didn't agree that *to get job according gained specialty in art area is complicated in foreign countries*.

CONCLUSIONS

1. Number of general and qualified art area specialists in Siauliai region art education and culture institutions are much more differentiated than in creative industries sector companies. Majority business subjects of creative industries sector are micro-companies – this issue particularly reduces employment opportunities for qualified art area specialists in Siauliai region.
2. It is prognosticated, that over the next 5 years the trend of changes of employees number in Siauliai region creative industries sector companies will be as follows: general number of employees will be the same in more than half companies and will grow a bit only in more than third companies; however number of qualified art area specialists will grow a bit in most companies. Although in half companies the lack of qualified specialists is actualized as company's problematical aspect, significant changes of employees it not foreseen.
3. It is prognosticated, that over the next 5 years the trend of changes of employees number in Siauliai region art education and culture institutions will be as follows: general number of employees will be the same in more than half institutions and will grow a bit only in more than third institutions; number of qualified art area specialists will be the same in more than half institutions, and will grow a bit only in quarter institutions. Although in more than third institutions the lack of qualified specialists is emphasized, significant changes of employees it not foreseen.
4. The lack of Design qualified specialists is indicated in more than half Siauliai region creative industries companies, in more than third companies – the lack of Art specialists. There is small demand for Graphic, Architecture specialists. There is almost no demand of Theater, Music, Audiovisual art specialists.
5. Siauliai region art education and culture institutions doesn't actualized significant demand of particular art areas specialists. There is only slight demand of Theater, Design specialists, very small demand of Music, Art specialists.
6. Majority of Siauliai region art education and culture institutions face with factor of insufficient financial support. In almost half of institutions it is indicated the lack of motivated schoolchildren/students, however majority of art education and culture institutions and creative industries sector companies keep relations with other similar subjects.
7. Unlike the art education and culture institutions, more than quarters of Siauliai region creative industries sector companies are planning to expand the scopes of activities in near

future by these issues: renewal of qualified labor market, purchase of new equipment, development of specialized company's activity areas.

8. Almost half of Siauliai region creative industries sector companies prognosticate that the highest demand over the next 5 years will have these art areas: Audiovisual art, Architecture. More than half of companies and quarter of art education and culture institutions emphasizes Design as perspective art area. Also more than quarter of art education and culture institutions actualizes Music, more than third – Art.
9. Majority of Siauliai region creative industries sector companies prognosticates, that the lowest demand over the next 5 years will have Art, also more than half companies emphasized Theater, almost third – Music. Part of art education and culture institutions emphasized the same art areas.
10. More than half Siauliai region creative industries sector companies describes country's economic-social situation at creative industries development aspect as satisfactory. However more than quarter art education and culture institutions mentioned situation describes as good.
11. Majority of Siauliai region creative industries sector companies and more than half art education and culture institutions actualizes low enterprise level of cultural and art creators, more than half creative industries sector companies and almost quarter art education and culture institutions actualized insufficient dissemination of information about creative industries sector.
12. Majority of Siauliai region creative industries sector companies and art education and culture institutions identify high marketing expenditure of creative industries production, more than half of creative industries sector companies and almost quarter art education and culture institutions actualize lack of information about potential markets as factors, which negatively influence creative industries development in country. Also more than third companies emphasize the lack of attention for image's creation of creative industries production, majority of art education and culture institutions – small investments in quality of learning environment.
13. Siauliai region art education institutions students motivation to choose art area's studies, is described by such arguments - as opportunity to get scholarship, recommendations of friends, familiar, convenient geographical location of high school. Only more than half students actualized art area's studies choice as their well long-considered decision, only quarter of students believes, that these studies will ensure well paid job for them. However more than half Siauliai region art education institutions schoolchildren selected lessons

attends interested and willing, but only small part of schoolchildren relates their future with selected learning area.

14. Majority of Siauliai region art education institutions students characterizes quality of learning environment as high teachers' competences, more than half students – as informative, easy understanding and well grounded learning material. However only quarter of the students gets enough practical skills during the lessons, and only third of the students give positive assesses to learning environment (infrastructure, needed equipment, tools). In general, studies met expectations only for more than quarter of students.
15. More than half of Siauliai region art education institutions students do not plan to continue studies. On opinion of majority of students, it is complicated to get job in conditions of modern labor market according to gained art area's specialty in Lithuania, but it is not complicated to get job in art area in foreign countries.

THE GUIDELINES OF SIAULIAI REGION CREATIVE INDUSTRIES SECTOR PROMOTION AND DEVELOPMENT

After identification of Siauliai region creative industries sector problematical aspects, it is appropriate to formulate *The guidelines of Siauliai region creative industries sector promotion and development* – specific plan of actions, which will help to region municipality, its institutions, education institutions and other subjects, related with or having influence for creative industries sector to formulate vision of creative industries development and active approach to its implementation.

✓ **The promotion of potential of Siauliai region creative industries sector
companies**

Taking into account the data of research where Siauliai region creative industries sector companies' characteristic of problematical aspects were identified, promotion guidelines of region creative industries sectors companies' potential are presented.

- ❑ Whereas majority of Siauliai region creative industries sector companies are micro-companies, they are not prognosticating more significant changes of numbers of general and qualified art area specialists over the next 5 years, arises real threat of creative qualified specialists emigration to other cities or foreign countries. It is necessary to realize the measures, which not only helps to save potential of qualified creators, but also formulates positive environment for creative industries development in Siauliai region:

1. ***To appoint subject in Siauliai region municipality, which would actually coordinate the evolution of creative industries development in Siauliai region:*** in particular periods would prepare detailed, various researches of creative industries sector companies, annual accounts-studies of sector situation, would present recommendations, ideas of projects, which would promote enterprise of region creative industries, for LR Government.

2. ***To establish the union of Siauliai region creative industries sectors businessman,*** which would organize the meetings of businessman of Siauliai and other regions, would represent creative industries sector in country and foreign – thus to create and publicize the image of Siauliai region creative industries sector production, which, based on results of the research, recently is in the lack of attention. Also to promote the mobility and enterprise of

region culture and art creators, which, as the results shows, is quite low currently.

3. *To create website of Siauliai region creative industries*, this would contain constantly updated information about meetings of businessmen union of Siauliai region creative industries sector, opportunities to present applications for projects.

4. *By cooperating with Siauliai territorial labour centres in Siauliai region creative industries website to create chapter*, which would contain information about vacancies in region creative industries business subjects. This measure would ensure quality and sufficient dissemination of information about creative industries, which, as the results of the research shows, is insufficient recently.

5. *To create electronic, freely available in web space map of Siauliai region creative industries*, which would contain information about all Siauliai region creative industries sector companies, also associations, unions, other non-governmental organizations, separating its according particular activity areas, number of employees, geographical location and other. This measure would promote competitiveness between companies, would be service for creative industries sector companies directors looking for new business partners for development of new business ideas. Regarding the aspect, that there are small demand of Graphic, Architecture, specialists and almost no Music, Audiovisual art specialists demand in companies, although companies directors emphasizes, that over the next 5 years the highest demand will has namely Audiovisual art, Architecture areas, the map of Siauliai region creative industries would become a measure, which would help to orientate in region creative industries market.

The promotion of potential of Siauliai region art education and culture institutions

- ❑ Whereas in majority of Siauliai region art education and culture institutions, as in creative industries companies, more significant changes of numbers of employees and subjects activity development aren't foreseen, it's important to take the measures, which would prevent the stagnation of art education and culture institutions as creative industries subjects:

1. ***In Siauliai region creative industries website to create special chapter***, which would contain always updated information about opportunities to present applications for projects. By cooperating with Siauliai territorial labour centre to put information about vacancies in region art education and culture institutions – for institutions employees and learners.

2. ***To include Siauliai region art education and culture institutions in to map of Siauliai region creative industries***. This measure would promote closer relations with institutions, implementation of wider scope's activities, and particularly – employment opportunities for qualified art area specialists, especially for Theatre, Design, Music, Art specialists – which demand is low in Siauliai region art education and culture institutions.

3. ***To rationalize funding appointed to art education and culture institutions at aspects of learning methods and measures, academic, cultural events, actions and other measures, motivating schoolchildren/students to choose art area lessons/lectures***, in this way the lack of motivated learners which is actual according the results of research would be reduced.

4. ***To rationalize high education system in creative industries area by focusing more on development of practical skills, quality of learning measures, methods*** – recently the most actual problems of learning environment in high education's creative industries area.

5. ***To cooperate more active with potential employers*** – with creative industries sector companies, art education and culture institutions, also to organize meetings, seminars, conferences, during which the students would present their business ideas for creative industries subjects.

6. ***To create conditions, which would be more favourable for high education's creative industries students to implement the practice in creative industries sector***

companies, focusing on students of following studies areas: Audiovisual art, Graphic, Art, Music – recently characterized as low demand having areas by companies directors.

7. *To organize seminars, conferences for Siauliai region art education and creative industries sectors companies directors*, in order to reach quality of schoolchildren and students learning methods, interface of learning material with demand of potential employers, teachers, especially older, mobility, receptivity for innovations.

8. *To establish the association of young businessman of creative industries sector, which would organize academic events, actions*, and would increase art studies popularity between young persons using other measures.