

cre8tv.eu

*unveiling Creativity for Innovation in Europe
a Seventh Framework research project*

“Entrepreneurship in the Creative Industries in Europe”

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CREA SUMMER ACADEMY

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Agenda

1. About CRE8TV.EU
2. The Creative Economy and Creative Industries
3. What kind of species is Entrepreneurship in CIs?

The findings of the CRE8TV.EU, the first survey on entrepreneurship in CIs across different sectors in 5 European countries

4. Policy Implications and suggestions
5. Modernizing Innovation Policy: some thoughts.

About CRE8TV.EU

Eleven Partners



- University of Manchester (UK)
- University of Brighton (UK)
- Technical University Eindhoven (NL)
- Copenhagen Business School (DK)
- Gothenburg University (SW)
- ZEW (DE)
- Technical University Munich (DE)
- Polytechnic of Milan (IT)
- Bocconi University (IT)
- Corvinus University of Budapest (HU)
- National Technical Uni. of Athens (GR)



3 Year Project - Unveiling Creativity for Innovation in Europe

Within Activity 8.1: Growth, employment & competitiveness in a knowledge society

Research Organised around Five Themes

1. Comparative International Data on the CCIs & their Innovation Activities
2. Models of Creativity, Design & Innovation and relations to Competitiveness
3. Entrepreneurs, Firm Growth and Industrial Dynamics in the CCIs
4. Digital Ecosystems, Digital Creatives & Blurring of Production/ Consumption
5. Intellectual Property (IP) Protection & IP Rights in the CCIs

Plus Policy Issues arising

Cre8tv.eu is a research project running from February 2013 to January 2016 and supported by a grant of the 7th Framework Programme of the European Commission (Socio-economic Sciences and Humanities). The Cre8tv.eu is a multi-partner and multi-disciplinary project which will unveil the significance of creativity and cultural and creative industries in Europe (and beyond). [Find More](#)

**CRE8TV.EU: PHD
AND EARLY
CAREER
RESEARCHER
WORKSHOP**



**ABOUT
CRE8TV.EU**



PEOPLE

DELIVERABLES





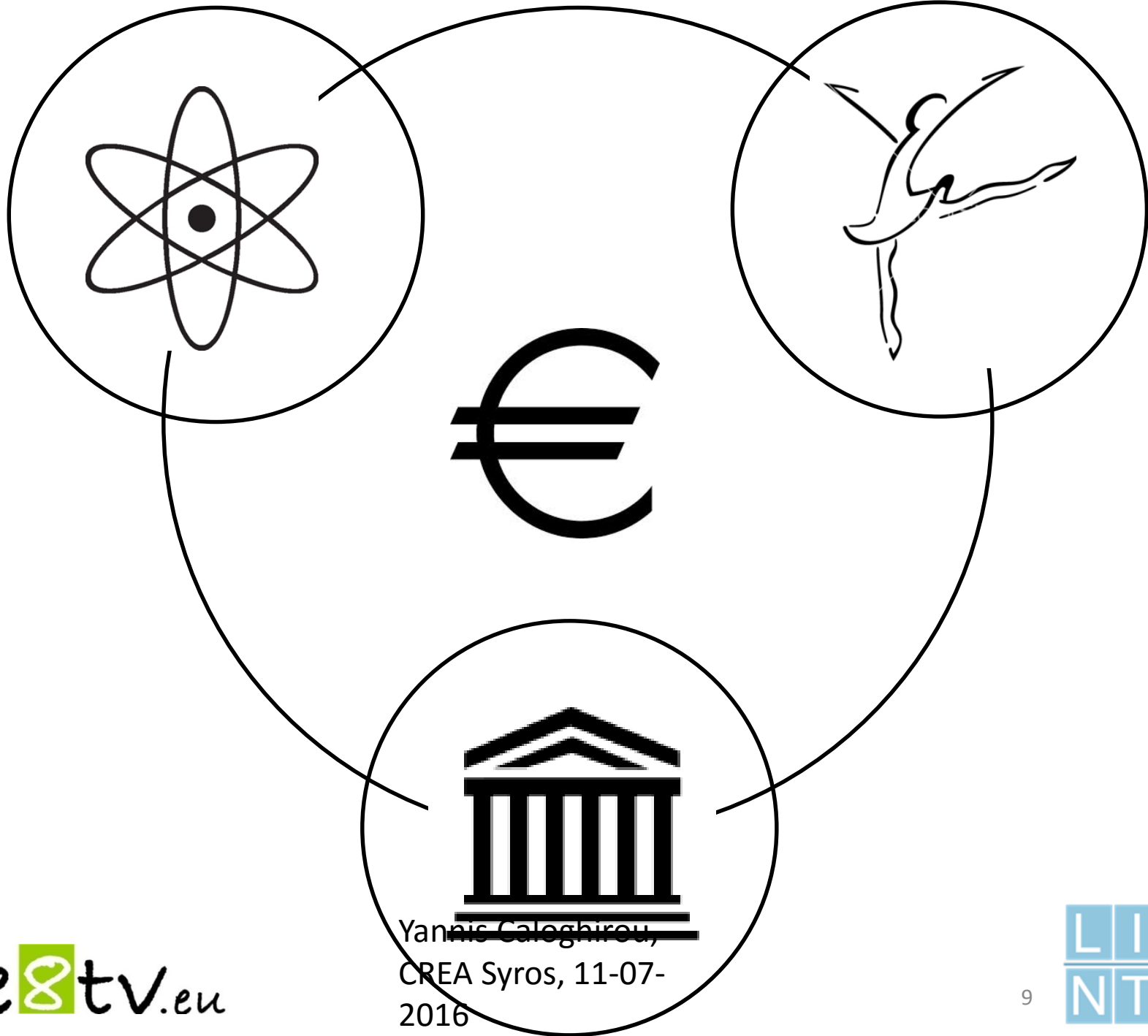
The Creative Economy & Creative Industries

Defined

European Commission Green Paper, 2010, pp. 5-6:

"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.

"Creative industries" are those 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.



Defined Empirically

Creative
(& Cultural)
Occupations

Other
Occupations

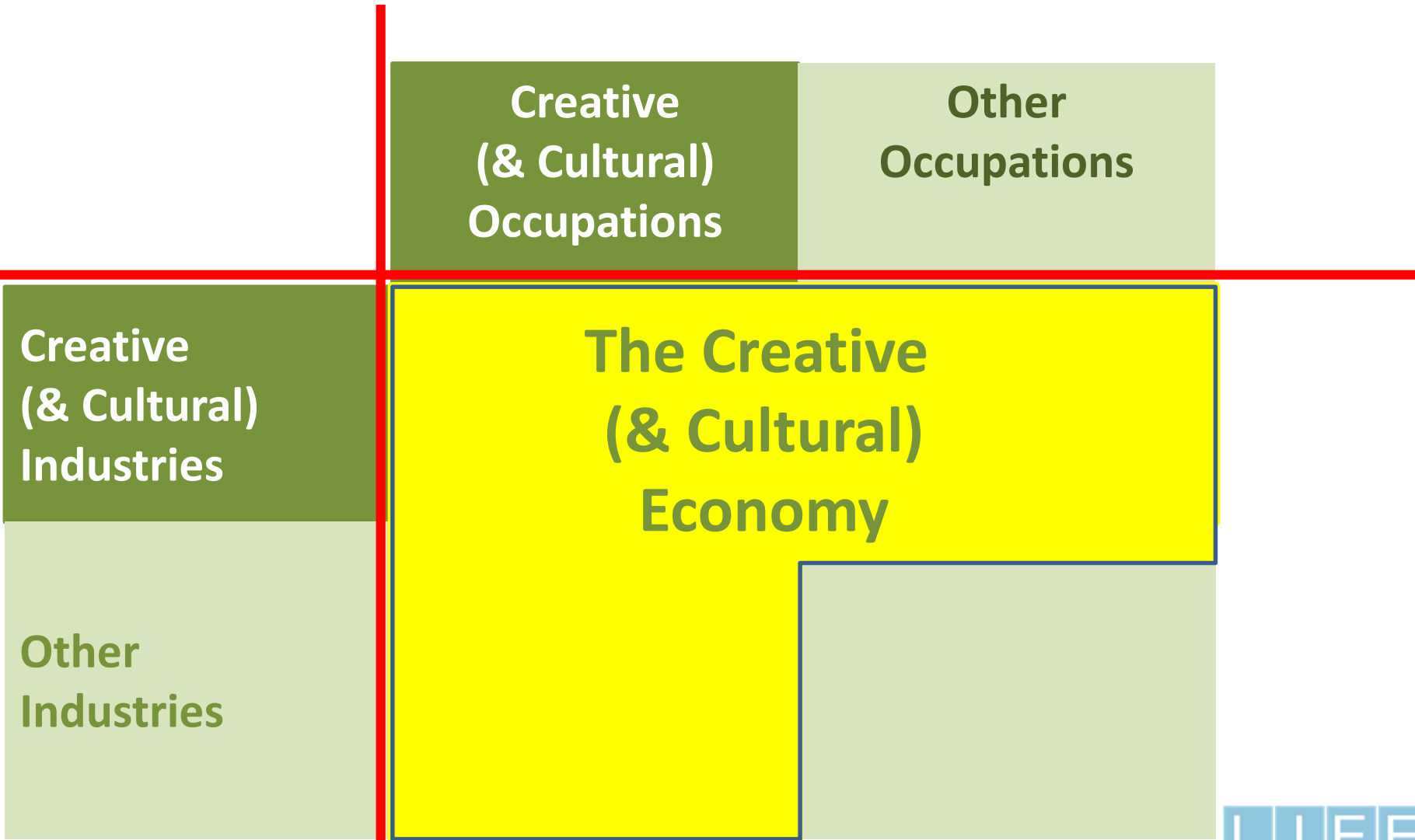
Creative
(& Cultural)
Industries

Industries with high “creative intensities”
i.e., in which creative occupations form a large
part of the total workforce

Other
Industries

Creative workers
working outside the
creative industries

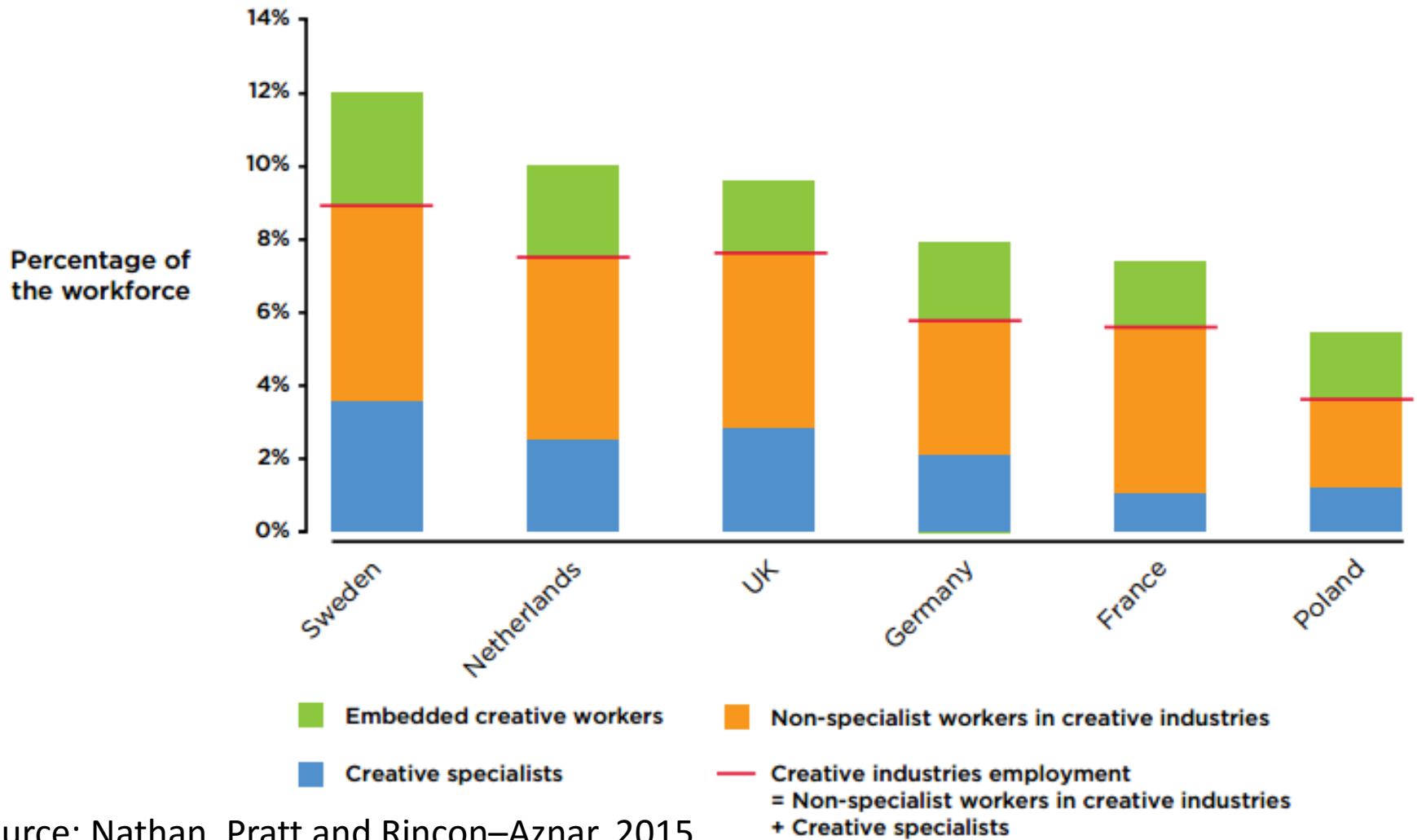
Defined Empirically



Dominance of Micro Enterprises

Enterprise size	Class of enterprise (# of employees)				
	SMEs				
Sector	1 - 3	4 - 9	10 - 49	50 - 249	250 +
Advertising	60.74 %	24.28 %	13.60 %	1.19 %	0.19 %
Architecture	62.71 %	22.86 %	12.59 %	1.63 %	0.22 %
Book&Press	58.74 %	23.95 %	14.37 %	2.38 %	0.56 %
Design	45.17 %	29.49 %	21.50 %	3.36 %	0.47 %
Fashion	51.59 %	25.30 %	18.95 %	3.57 %	0.58 %
Film&Video	59.73 %	25.69 %	12.75 %	1.60 %	0.24 %
Music	69.18 %	18.35 %	10.20 %	1.83 %	0.44 %
Performing Arts	63.01 %	21.93 %	12.52 %	2.25 %	0.30 %
Radio&Television	47.40 %	26.86 %	20.94 %	3.96 %	0.84 %
Software Pub.	62.34 %	20.60 %	13.91 %	2.64 %	0.51 %
Visual Arts	61.62 %	21.97 %	12.86 %	2.96 %	0.59 %
Average	58.38 %	23.75 %	14.93 %	2.49 %	0.45 %

EMPLOYMENT IN THE CREATIVE ECONOMY AND ITS COMPOSITION



Source: Nathan, Pratt and Rincon-Aznar, 2015

Notes: with the exception of Germany which is based on the average of 2012–2013 data all other countries figures are an average of 2011–2013 data.

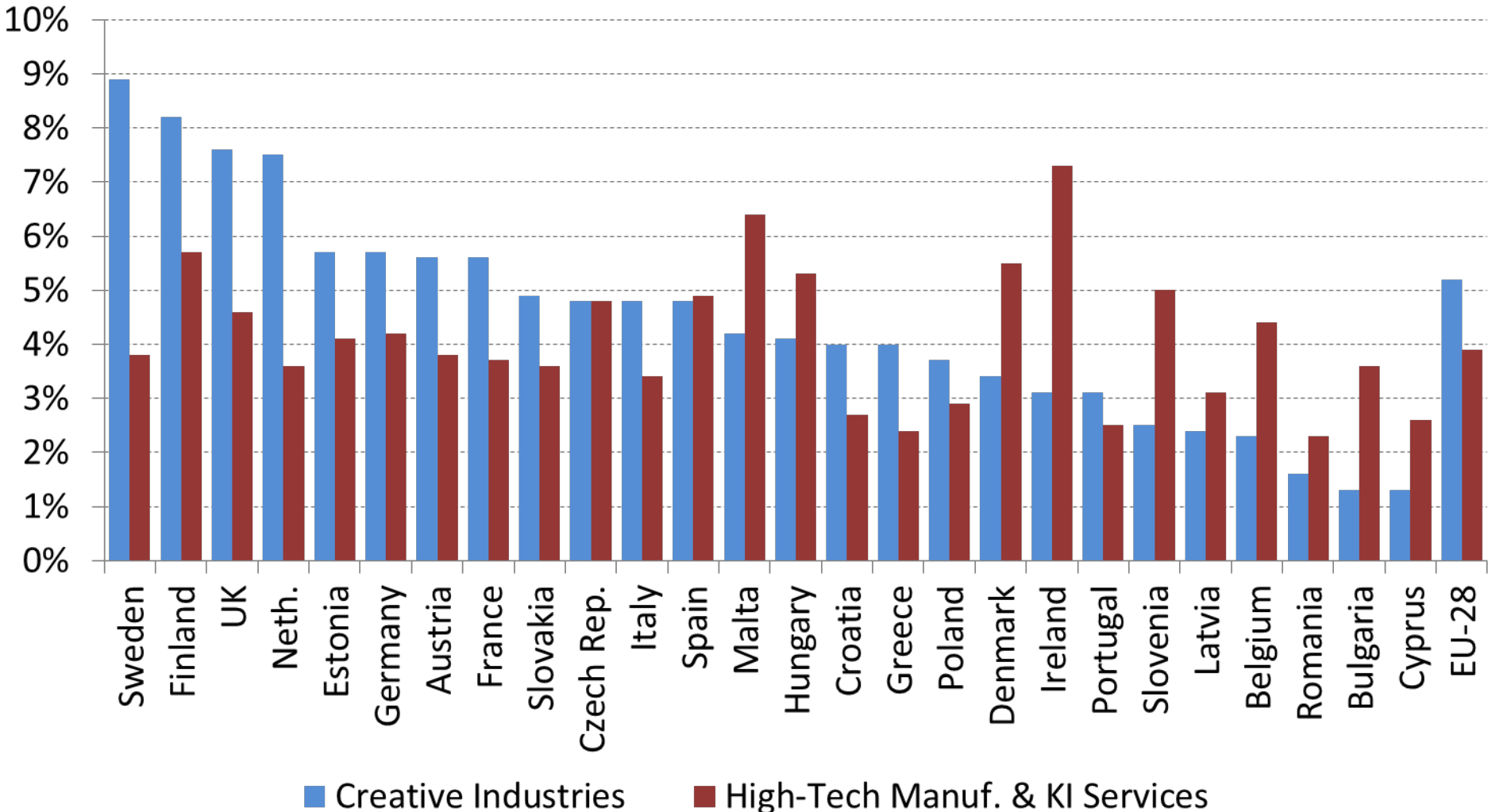
Employment in the Creative Industries in the EU 28 (2011-2013) (Nathan et al., 2015)

Industry group	Industry employment	% of all creative industries employment	% of all employment
Advertising and marketing [#]	1,923,000	17.1%	0.89%
Architecture*	2,302,000	20.5%	1.07%
Design Services	377,000	3.4%	0.18%
Film, TV, video, radio and photography	877,000	7.8%	0.41%
IT, software and computer services	3,022,000	26.9%	1.40%
Publishing	1,001,000	8.9%	0.47%
Museums, galleries, libraries	600,000	5.3%	0.28%
Music, performing and visual arts	1,115,000	9.9%	0.52%
Total	11,218,000	100.0%	5.21%

[#] of which 801,000 (7.14%) are employed in advertising

* includes engineering activities and related technical testing.

Share of total Employment in Creative Industries and in High Tech and Knowledge Intensive Sectors



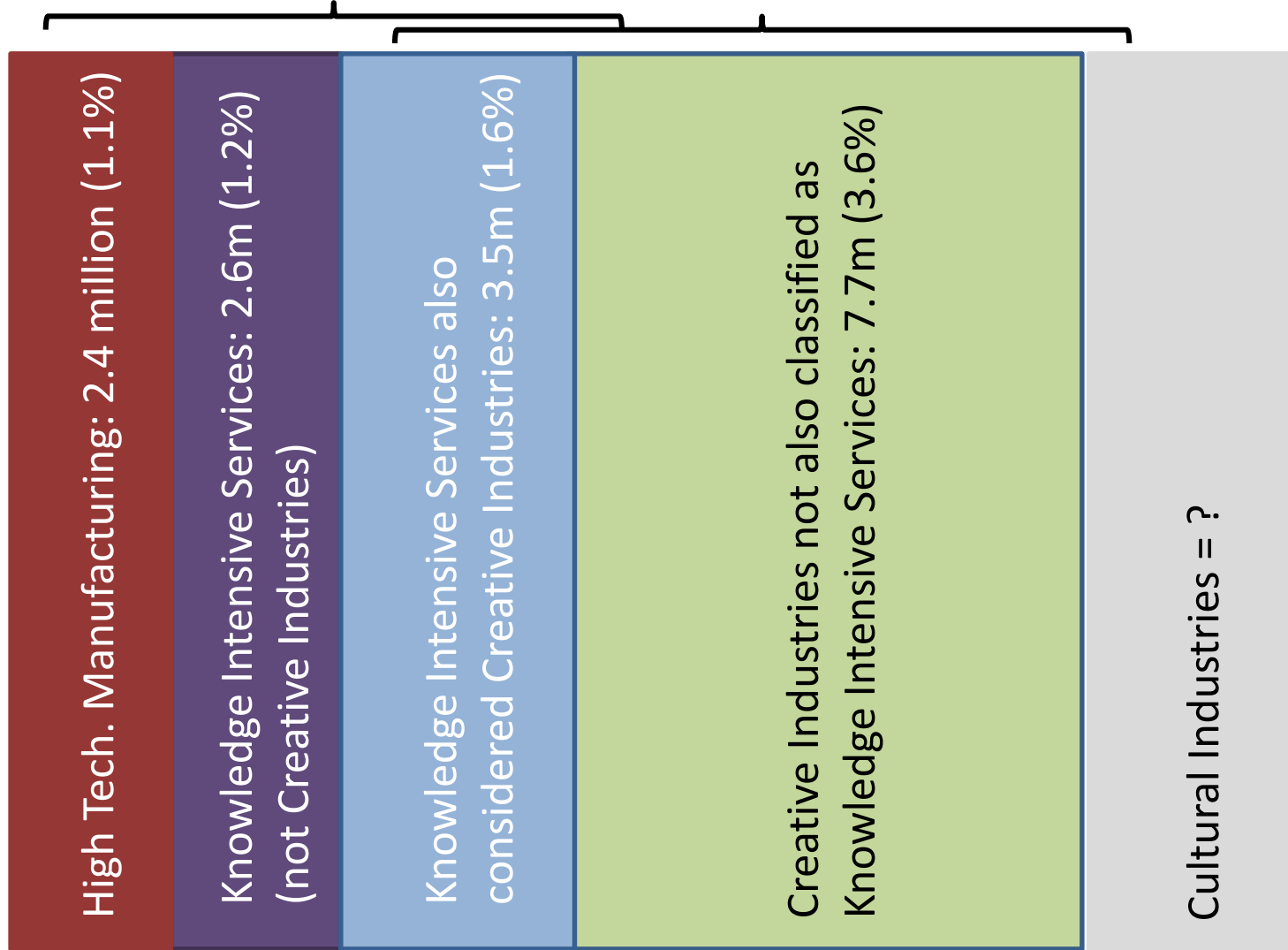
Luxembourg and Lithuania excluded due to missing data

Sources: Nathan et al (2015) and Eurostat



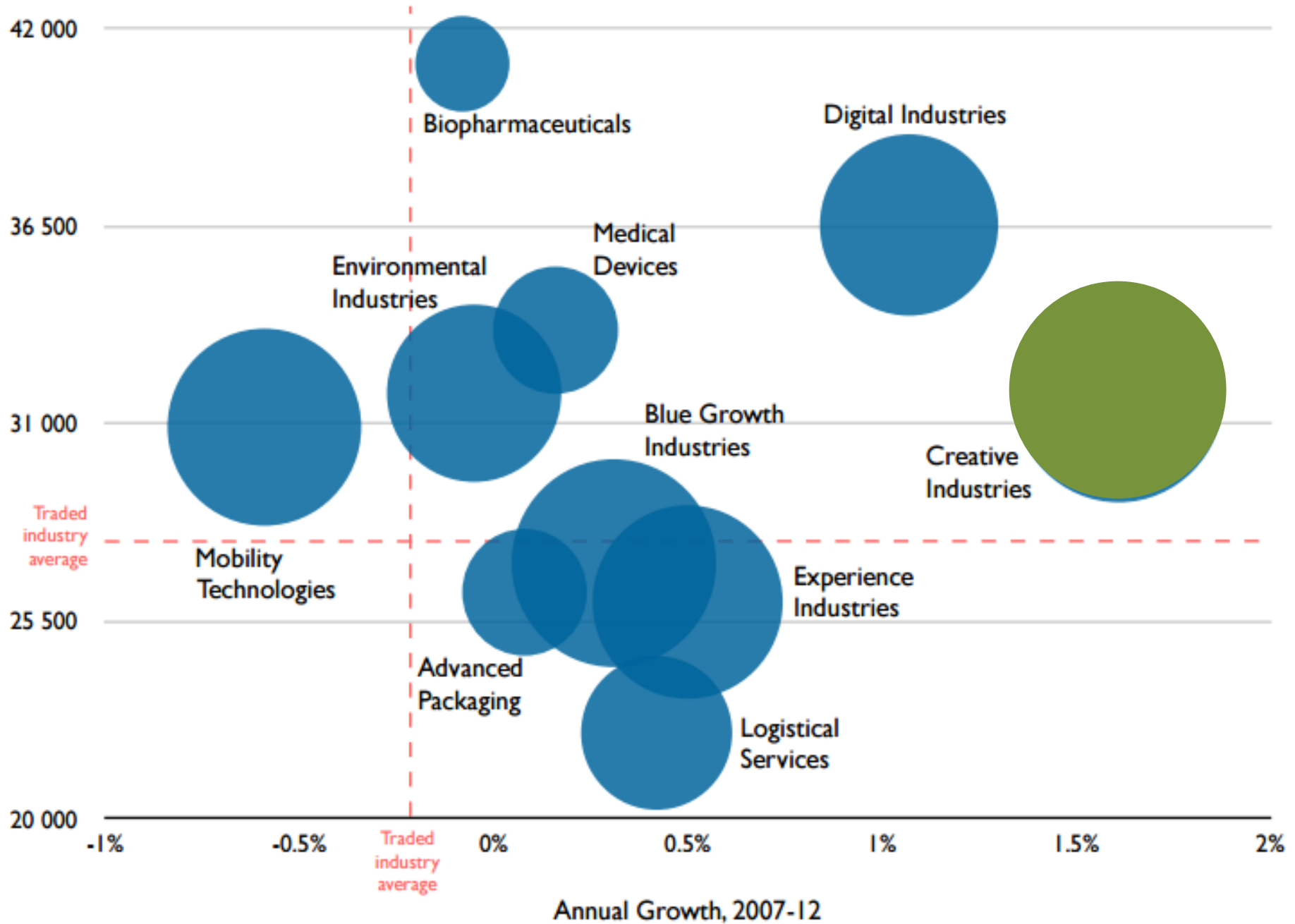
High Tech Manufacturing &
Knowledge Intensive Services
8.5million jobs (3.9%)

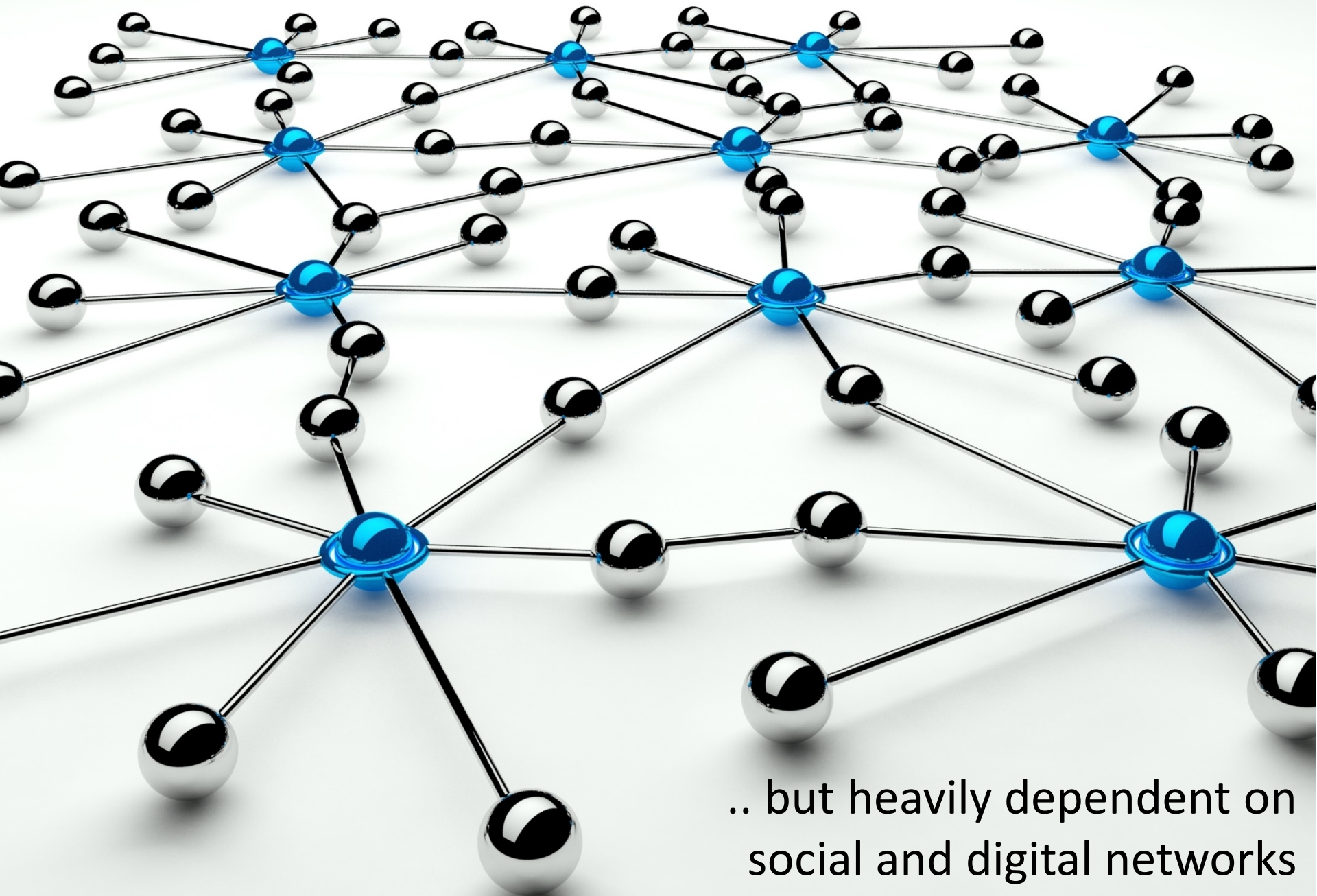
Creative Industries
11.2million jobs (5.2%)



● Size represents the number of employees in 2012

Average Wage, 2012





.. but heavily dependent on
social and digital networks
(increasingly involving pro-sumers)

Cre8tv.eu survey : The **first** survey on entrepreneurship in CIs across different sectors in 5 European countries

Key Messages

Creative industries are based on human imagination and desire for expression, in the context of cultural values, established and emerging

They are substantial, comparable in employment to the high tech and knowledge intensive sectors (with which they partially overlap)

They are growing – often substantially faster than the rest of the economy (they have also been resilient following the financial crisis)

Overall, they provide financially and intellectually rewarding work

Creative industry firms tend to be very small, mainly micro businesses

Firms are usually embedded in social and digital networks – they expand through using freelancers and by collaborating with partners

Cre8tv.eu survey:

The **first** survey on entrepreneurship in CIs in
different sectors in five European countries

Structure of the presentation

- CRE8TV.EU survey: Design and Implementation

- Key issues addressed
 - Nature of the CIs firms
 - Who are the entrepreneurs in the CIs?
 - Innovative activity, networks and linkages to the wider economy, knowledge spillovers
 - Firm growth

- Conclusions – Key messages

Why this survey?

Relatively little is known about entrepreneurship in the creative industries (especially at an empirical level) mainly because:

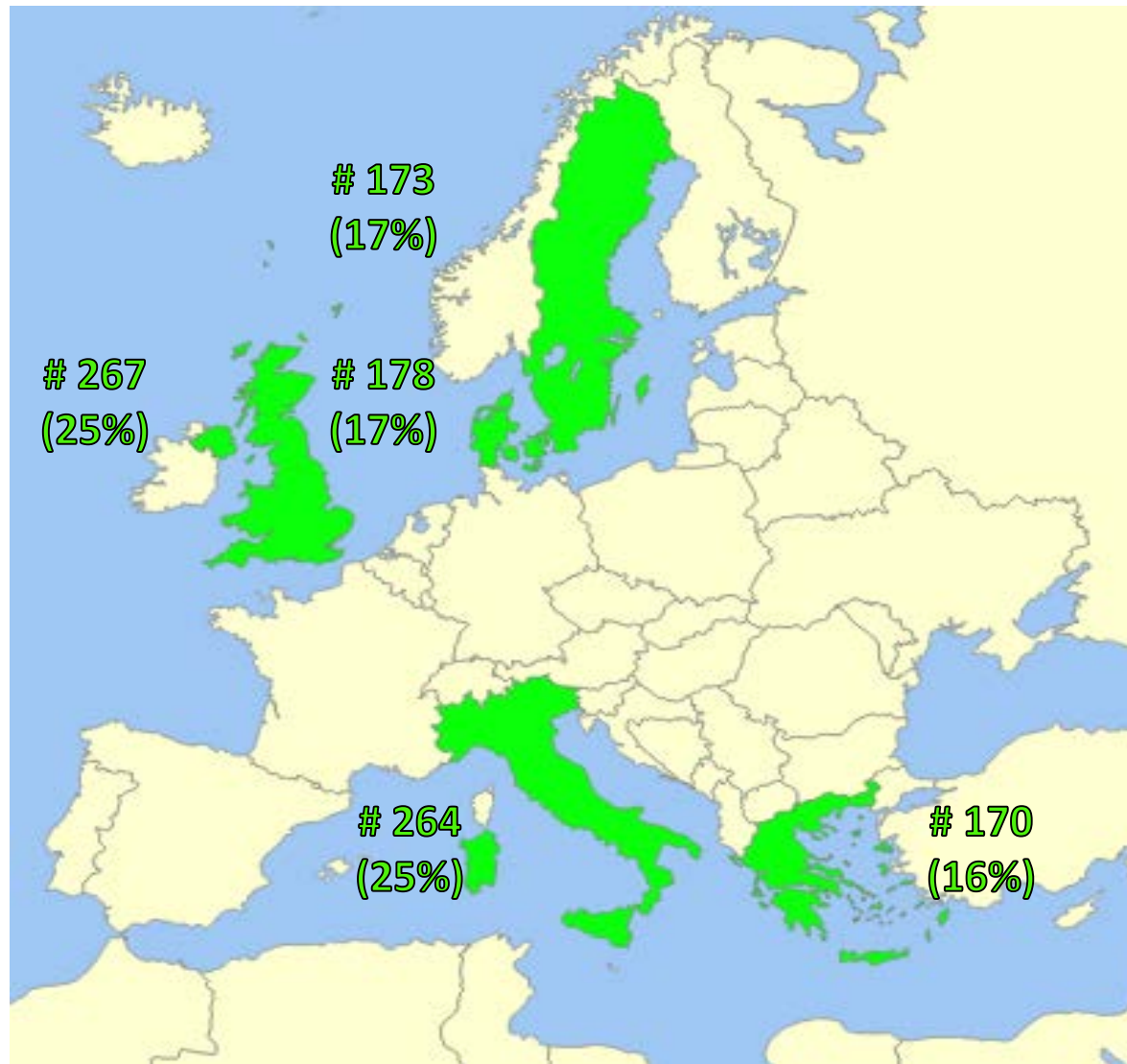
- the creative sector comprises a large number of heterogeneous sub-sectors and industries;
- further definitional and policy coherence is needed on what constitutes CIs;
- ‘creative and cultural entrepreneurship’ entails the combination of two different worlds (creative/artistic and business).

Who was Surveyed?

Survey and Questionnaire Design undertaken by LIEE/NTUA, Athens in collaboration with CRIOS UB, Milan (Franco Malerba's team).

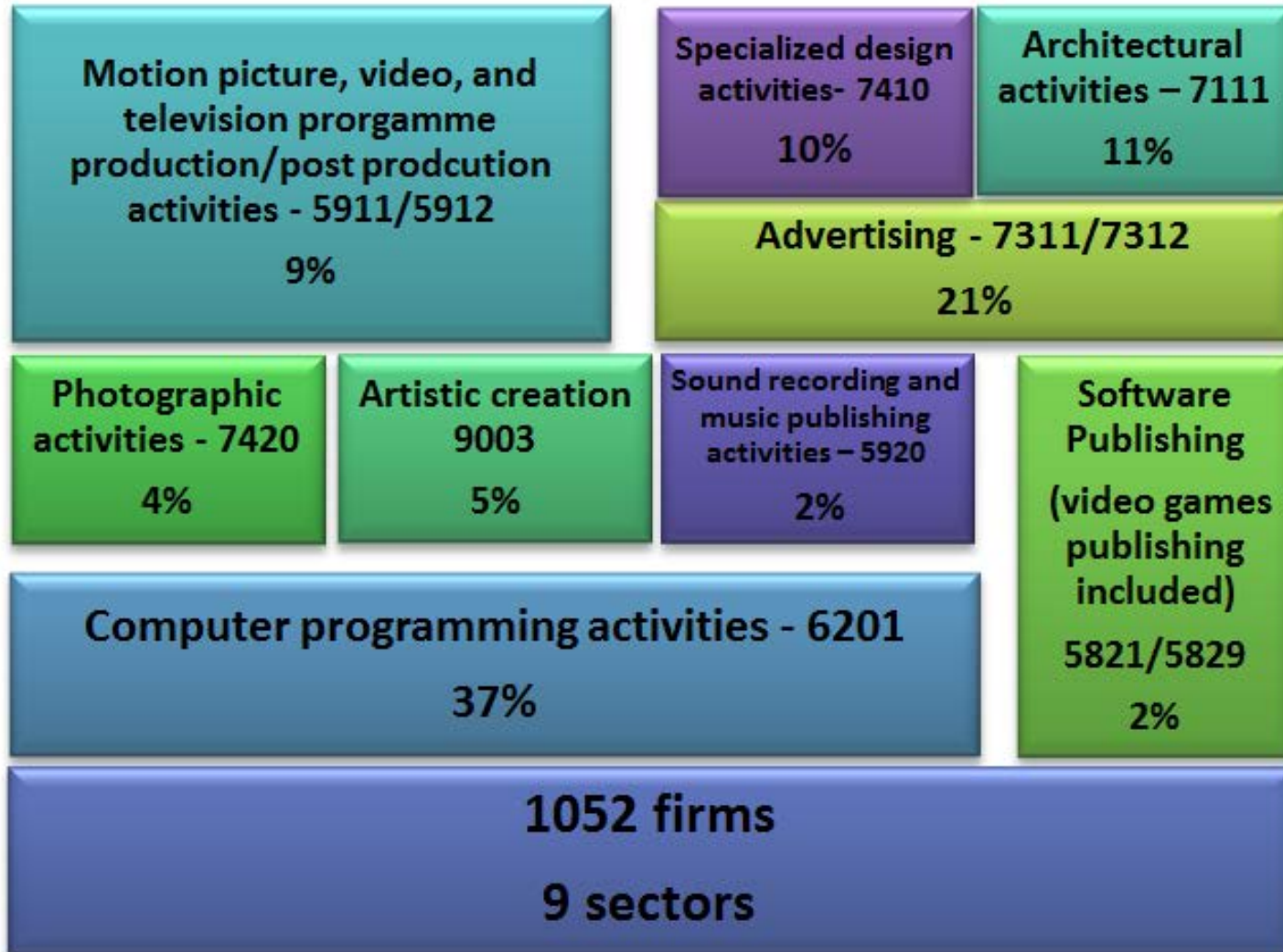
- **Newly** established firms
 - Founded between **2005** to **2012** within pre-selected creative sectors
- **Actually** new firms but **not** new legal entities resulting from any type of legal transformation of already existing firms (screening questions)
- No subsidiaries of existing companies or mergers/acquisitions or joint ventures (screening questions)
- **Initial** target sample **500** firms → **final** target sample **1081** firms
- Field research conducted during the 2nd Q of 2015 by GDCC (CATI type)

Target sample in the 5 countries



Realized Sample:

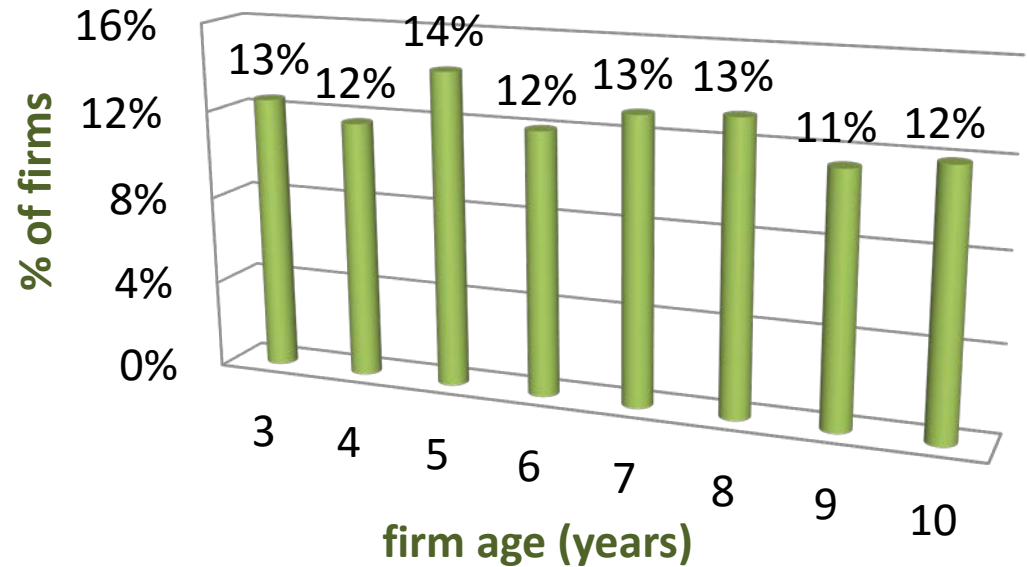
1052 firms in 9 creative industries



Participating firms:

Newly established companies between 3 and 10 years of age

- Founding years:
2005 – 2012
- The youngest firms are in
 - Software publishing
 - Sound recording and music publishing
- Youngest firms are more often in
 - Sweden



Average firm age : 6.4 years

Median firm age: 6 years

Three key Issues:

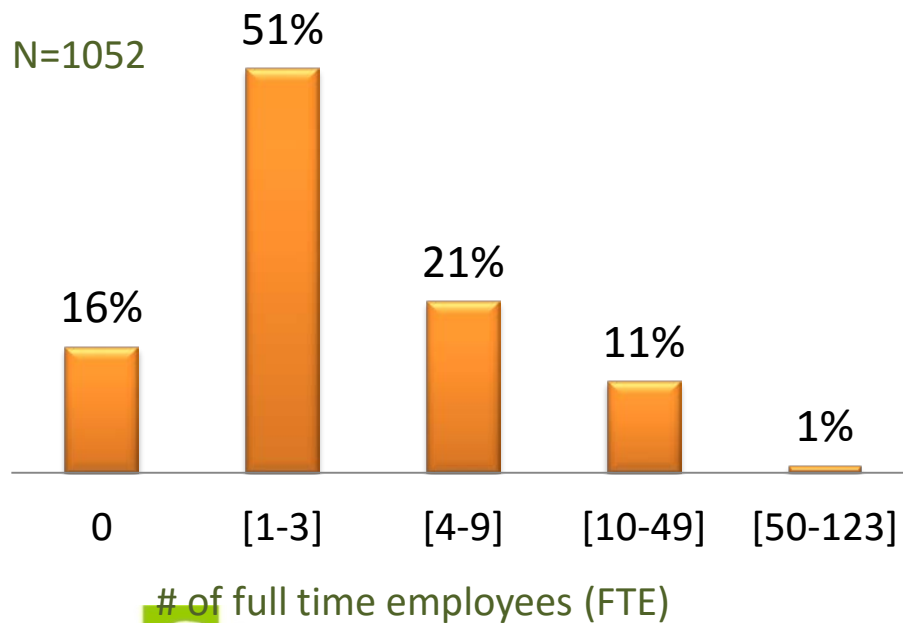
- 1. Nature of the Firms**
 - 2. Nature of the Entrepreneurs**
 - 3. Linkages, Networks & Spillovers**
-

**1. Nature of the CIs firms:
micro enterprises with flexible
employment forms**

Firm size:

The majority of firms are (very small) micro enterprises

Firm size is influenced by:
the nature of CIs and the
employment structure in CIs



	Full-time	Freelancers	Part-time
N	883 (84%)	633 (60%)	352 (33%)
Mean	5.46 (9.30)*	7 (16.90)	3.24 (10.47)
Median	3	3	1
Min.	1	1	1
Max.	123	300	140

*Std. Deviation in parentheses

Larger firms in terms of FTE:

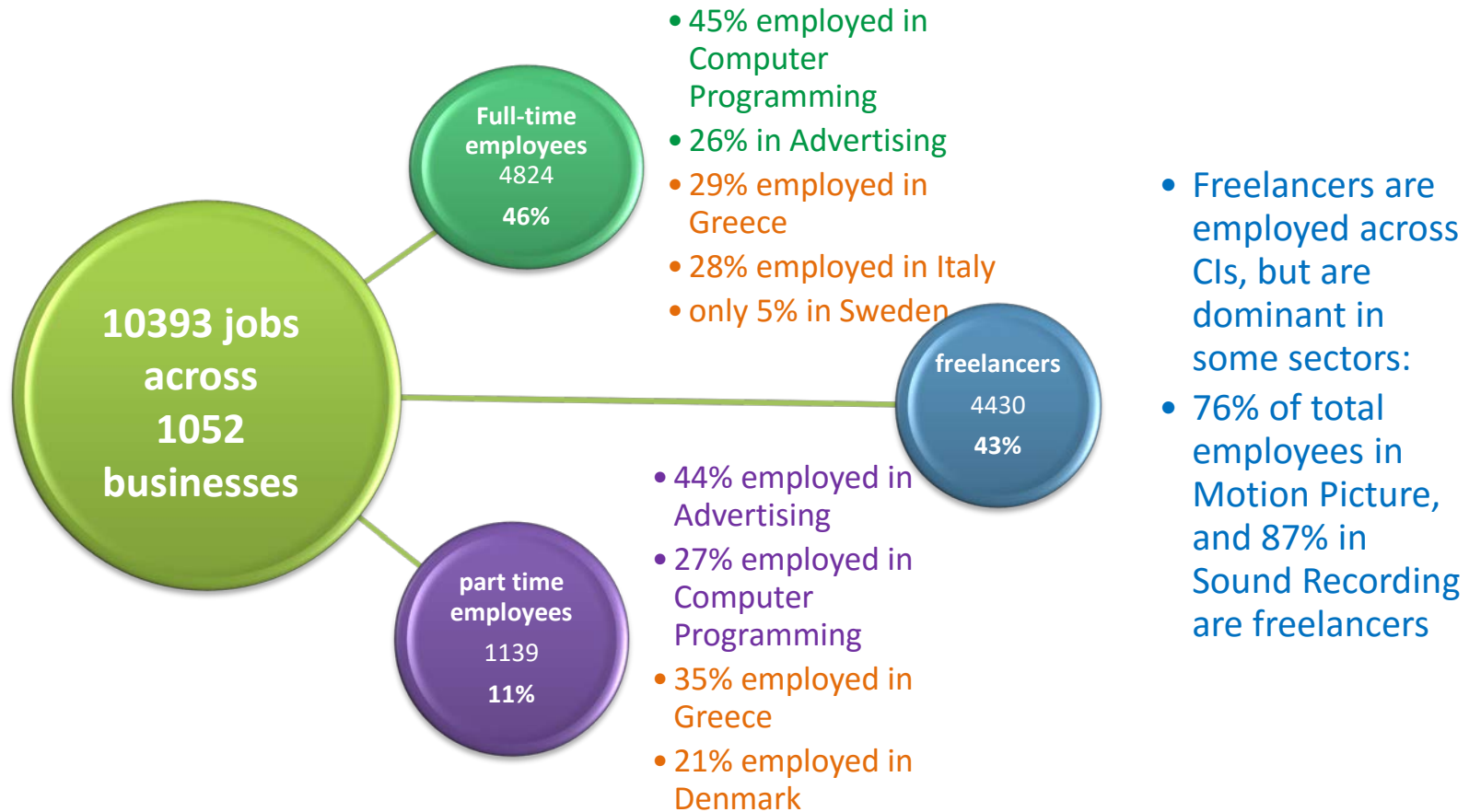
- software publishing (7)
- advertising (6)
- computer programming (6)
- Greece (9)

Smaller firms in terms of FTE :

- sound recording and music publishing (2)
- photographic activities (2)
- Sweden (2)

Employment forms:

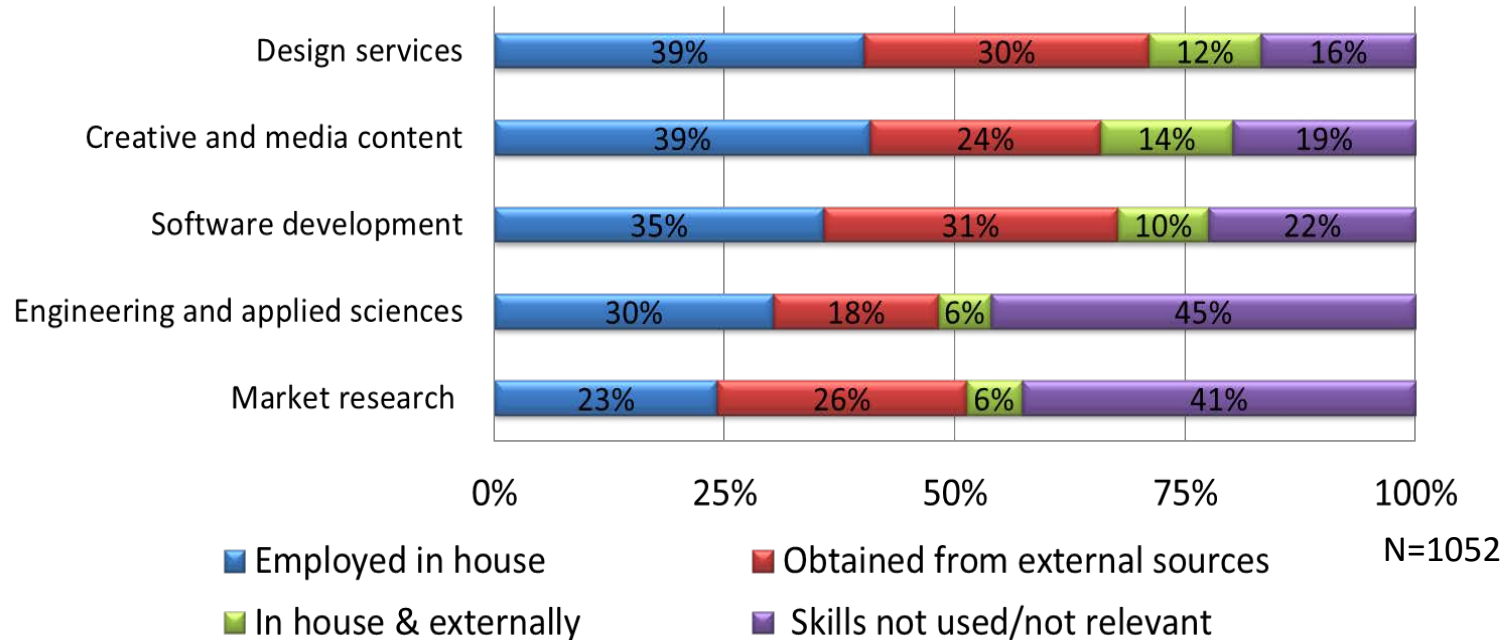
CI firms make extensive use of networks/freelancers



Employees in the creative industries tend to be more engaged in freelancing, part-time work, and temporary contracts, than the workforce in general.

In-house skills and externally sourced skills:

Core activities are kept in-house



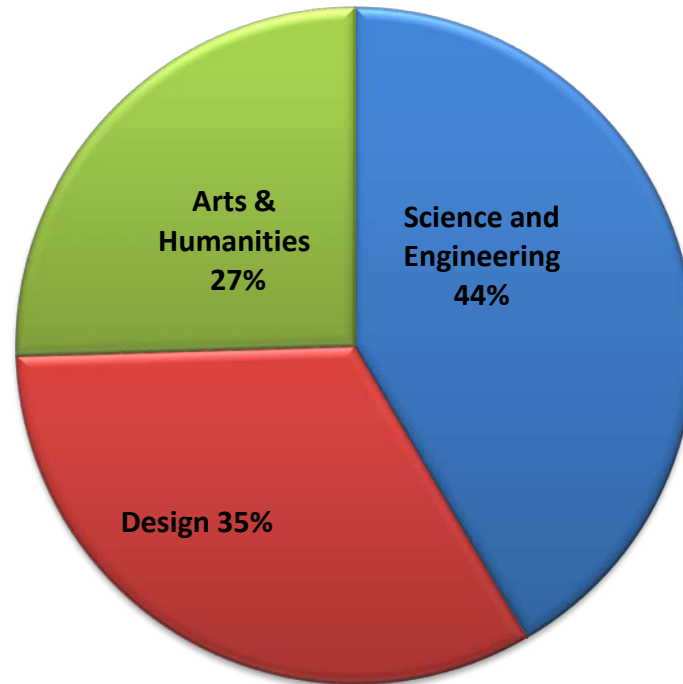
- Over 96% of firms have used at least one type of creative skills (in-house or obtained externally)
- Core activities are kept in-house
 - Design services: Architecture (61%), specialized design (57%)
 - Software development: Computer programming (65 % in-house)
- The larger the enterprise the more likely it is to employ individuals in-house

Employees' educational background:

3 out of 4 companies employ people holding a university degree in specific disciplines

% of firms employing people with a degree in

Approx. 50% of firms in Motion picture and Sound recording employ Arts and Humanities degree holders



70% of firms in Computer Programming and 82% in Software Publishing employ Science and Engineering degree holders

At least 1 out of 5 firms across sectors employ Design degree holders

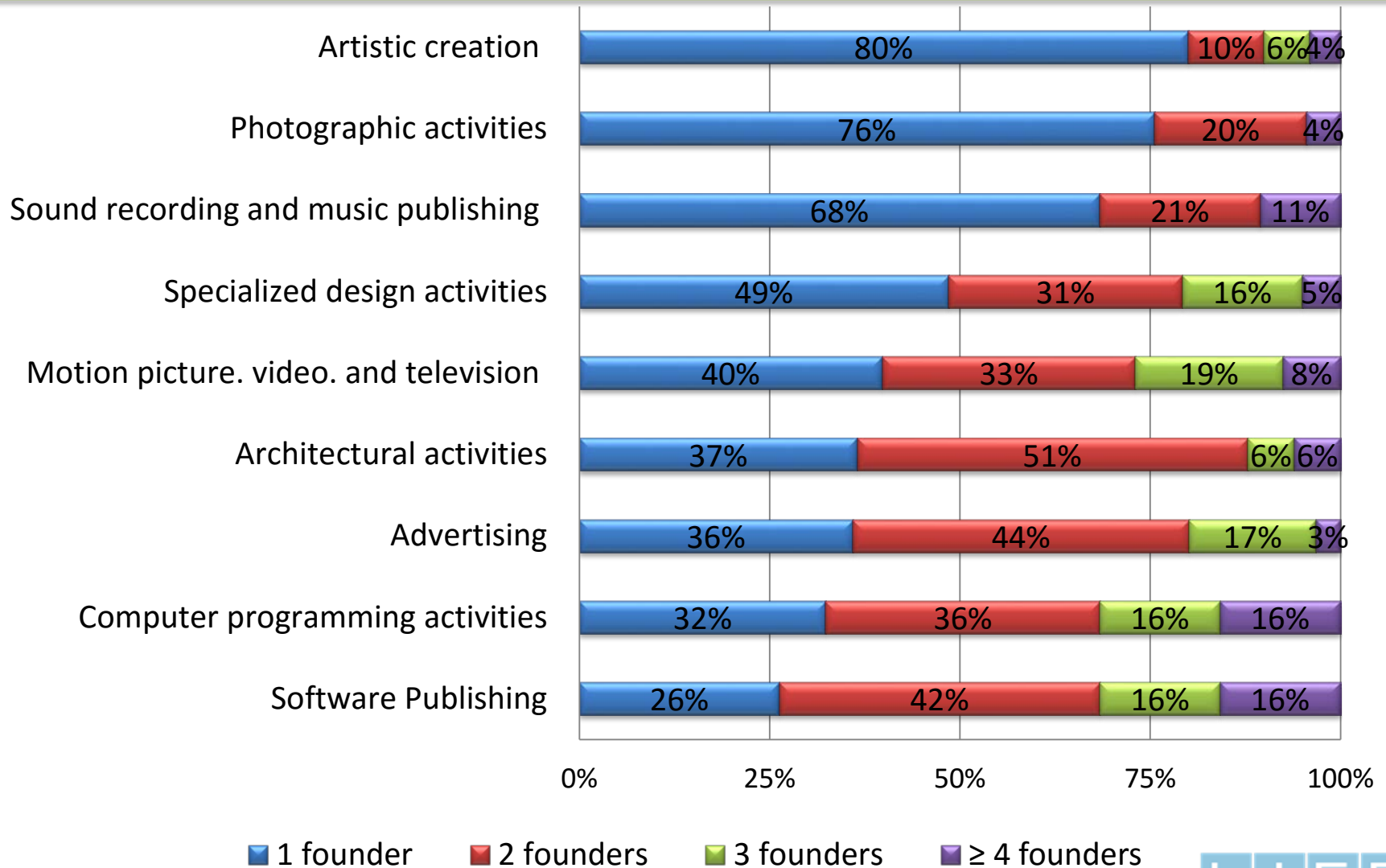
- Highly-educated human capital
- Close relationship between employees' educational attainment and specific requirements of CIs

**2. Who are the entrepreneurs in the CIs?
(founding team profile, formation motives,
formation process, growth barriers)**

**Founding team profile
size, education, age, expertise & gender**

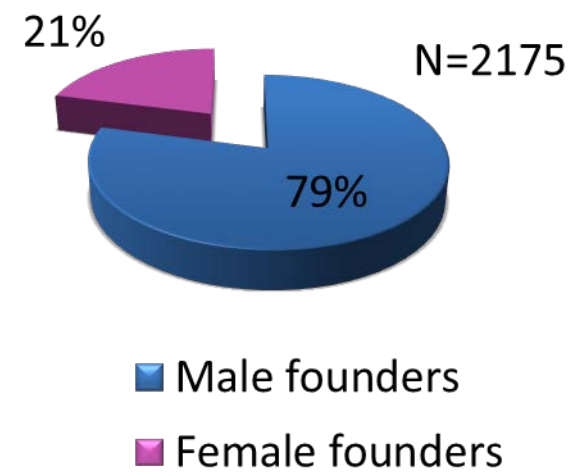
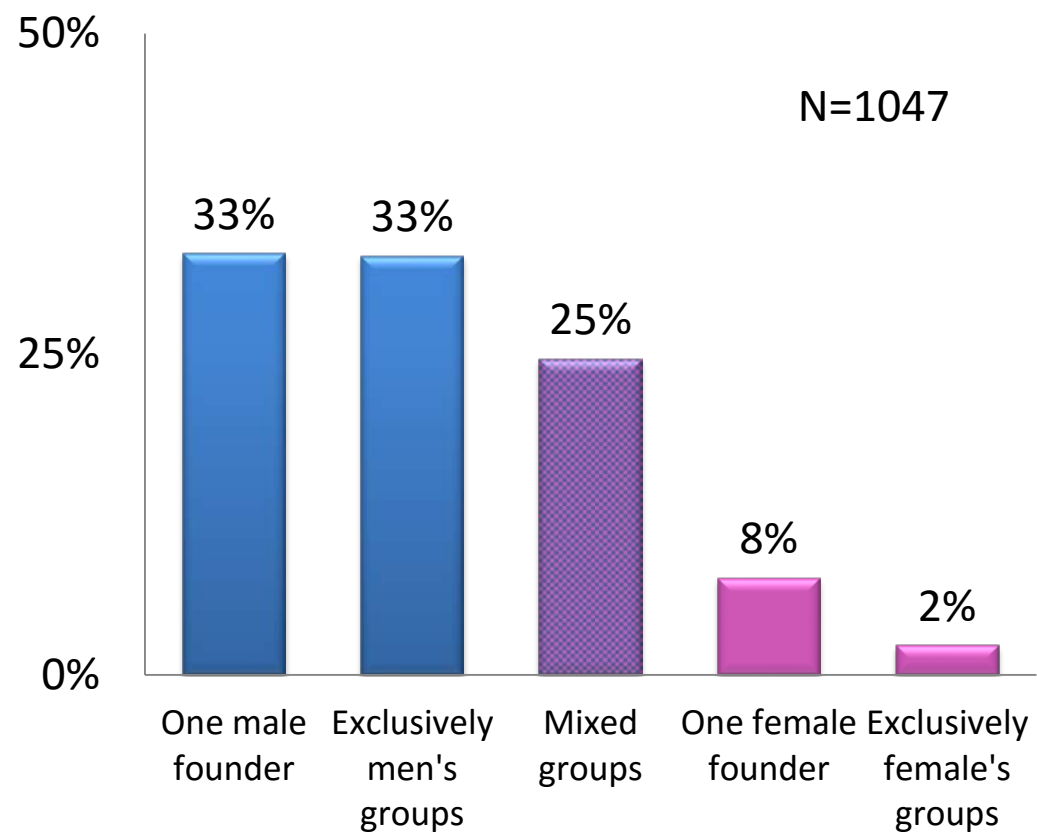
Founding team size:

Typically 2 people , but highly variable by sector



Founding team's gender composition:

Male dominated

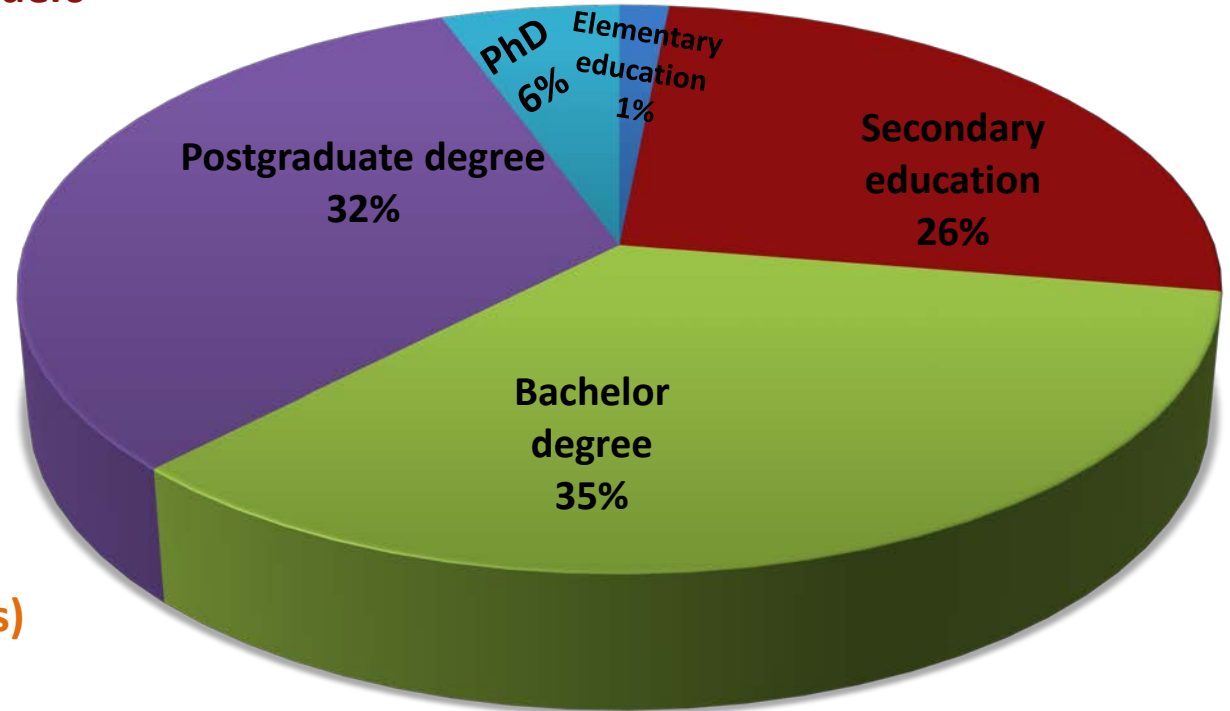


- ↑ architecture (30.33%)
- ↑ artistic creation (29.41%)
- ↑ advertising (24.5%)
- ↑ **Sweden** (25%)
- ↓ programming and computer activities (14.81%)
- ↓ sound recording and music publishing activities (10.35%)
- ↓ **Denmark** (16%)

Human capital of founders:

Highly-educated people

27% non-university degree holders,
38% post-graduate degree holders
(PhDs included)



Non-university degree holders

↓↓ Greece (6% of the founders)

↑ Italy (41% of the founders)

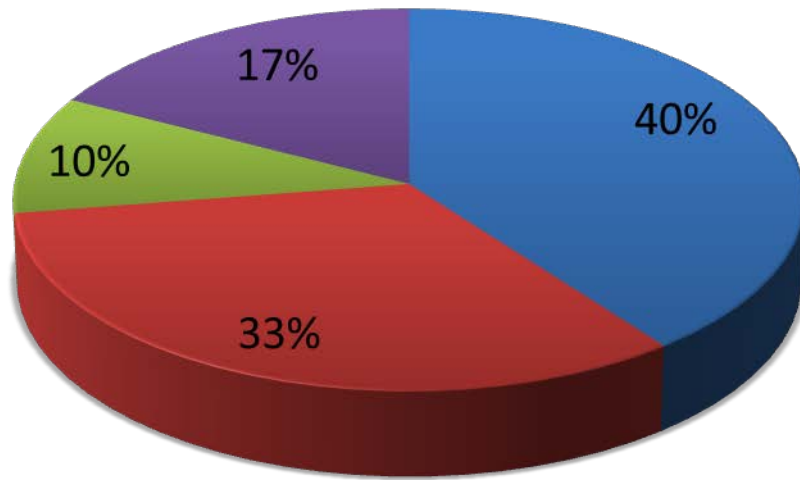
↑ Sound recording & music Publishing (65% of founders)

↑ Photographic activities (52% of founders)

N= 1943 founders

Main areas of founders expertise; and founders age

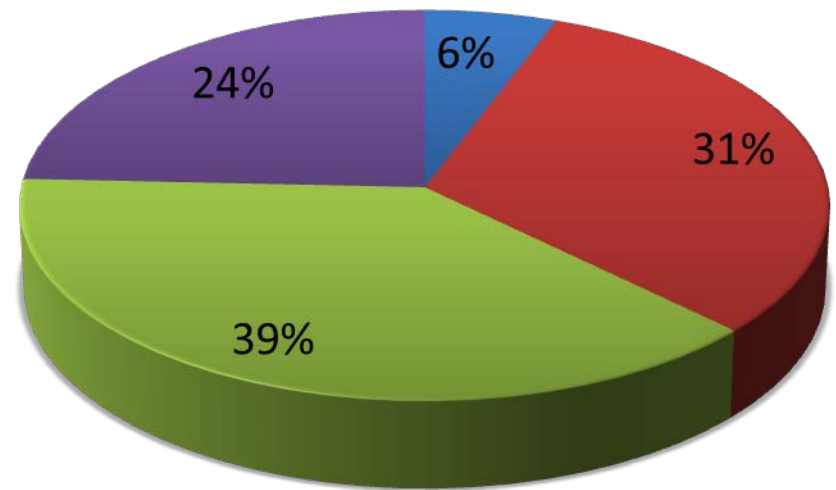
Main area of Expertise



- Technological expertise
- Creative and artistic expertise
- Market expertise
- Managerial expertise

Founders' age

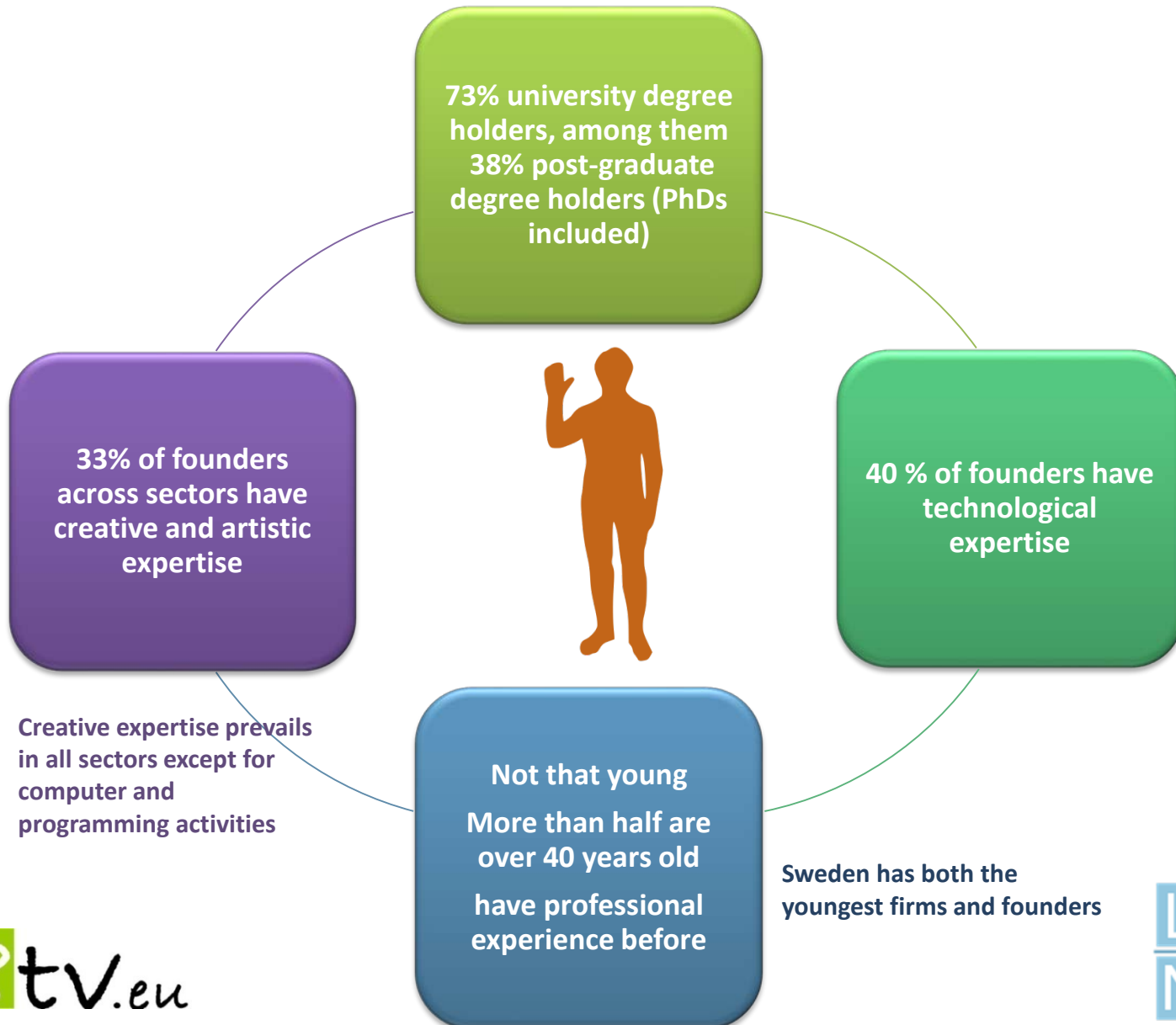
N=2175



- 18-29
- 30-39
- 40-49
- >50

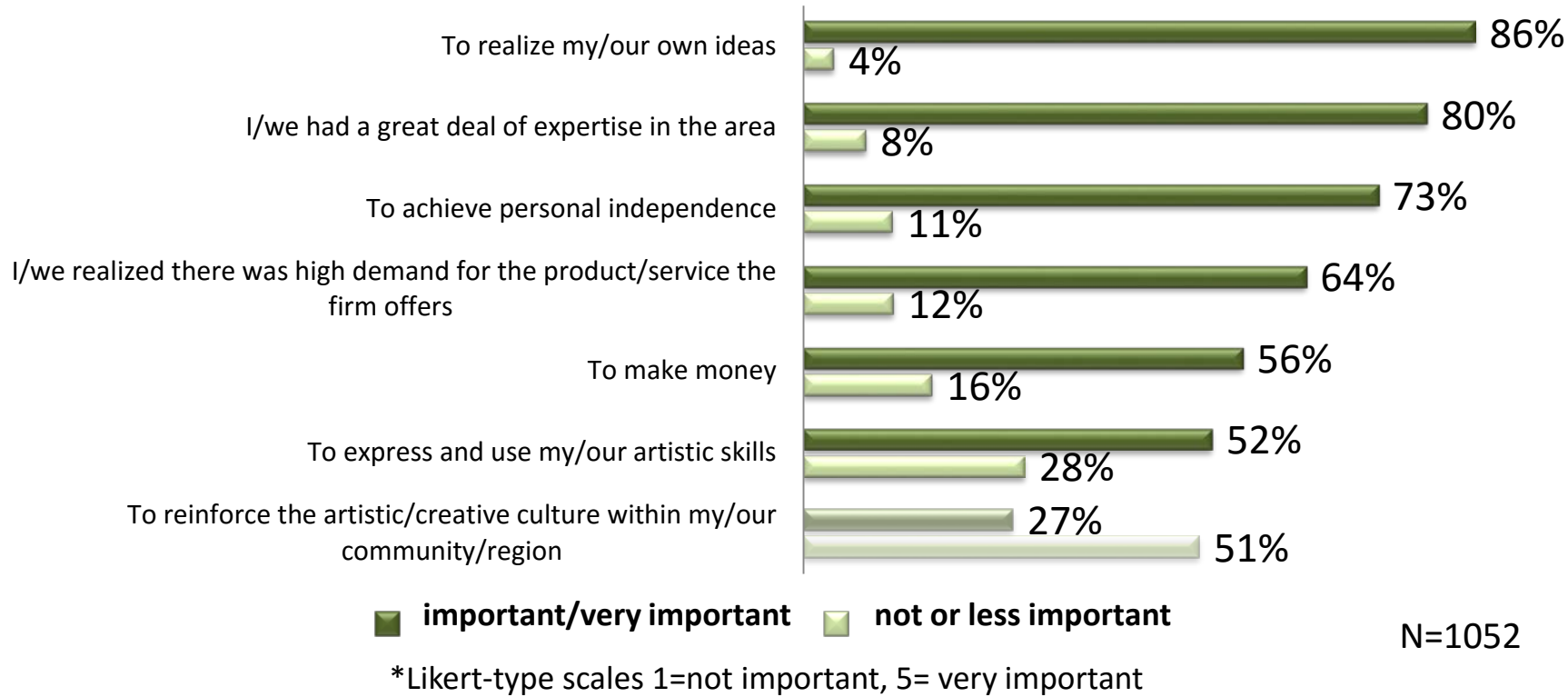
Summary:

The profile of the entrepreneur in the Creative Industries



Motivations for founding the business

Most important driver in decision to start a business: Realize my own ideas and significant expertise in the area



To realize my/our own ideas :

- Artistic Creation (4.6)
- Sound Recording & music publishing (4.63)
- Denmark (4.46)

Firm formation

Firm origins:

Mainly new companies with no previous business or academic links

Origin	# firms	% firms
Spin-off from existing company	62	5.9%
University spin-out	25	2.4%
New company without previous links to a company or university	958	91.7%
Total	1045	100%

Company Spin-offs

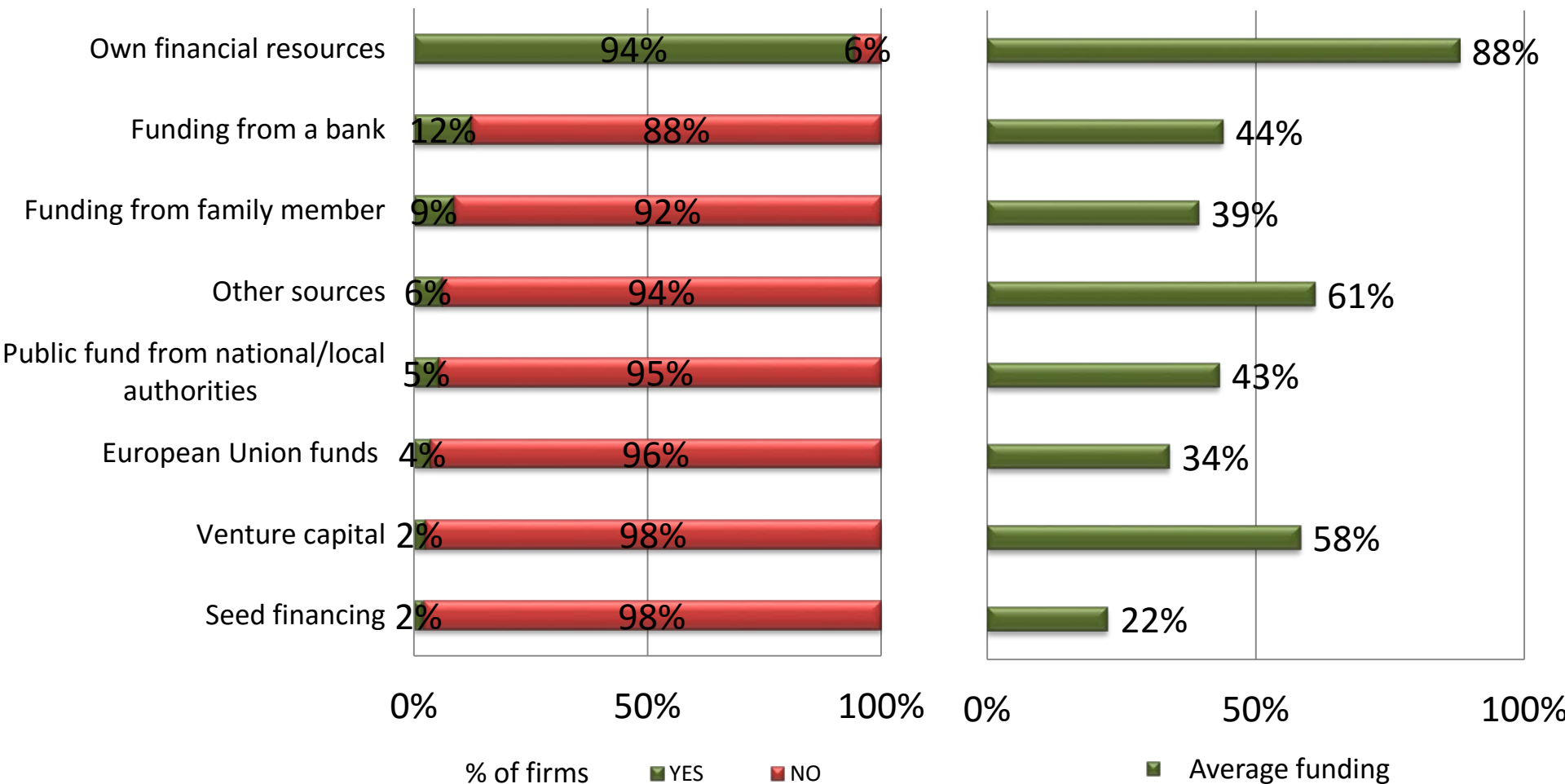
- Parent company is in the same sector (51 firms)
- New firms have not received any type of support (35 firms)

University Spin-outs

- 18 out of 25 in computer programming activities

Sources of funding used to establish the company:

Mainly own financial resources



94% of firms used own financial resources, on average 88 % of total funding

Summary:

Sources of funding used to establish the company

- 3 out of 4 firms relied entirely on founders' own sources

- creative entrepreneurs find it difficult to attract venture capital funds or seed financing

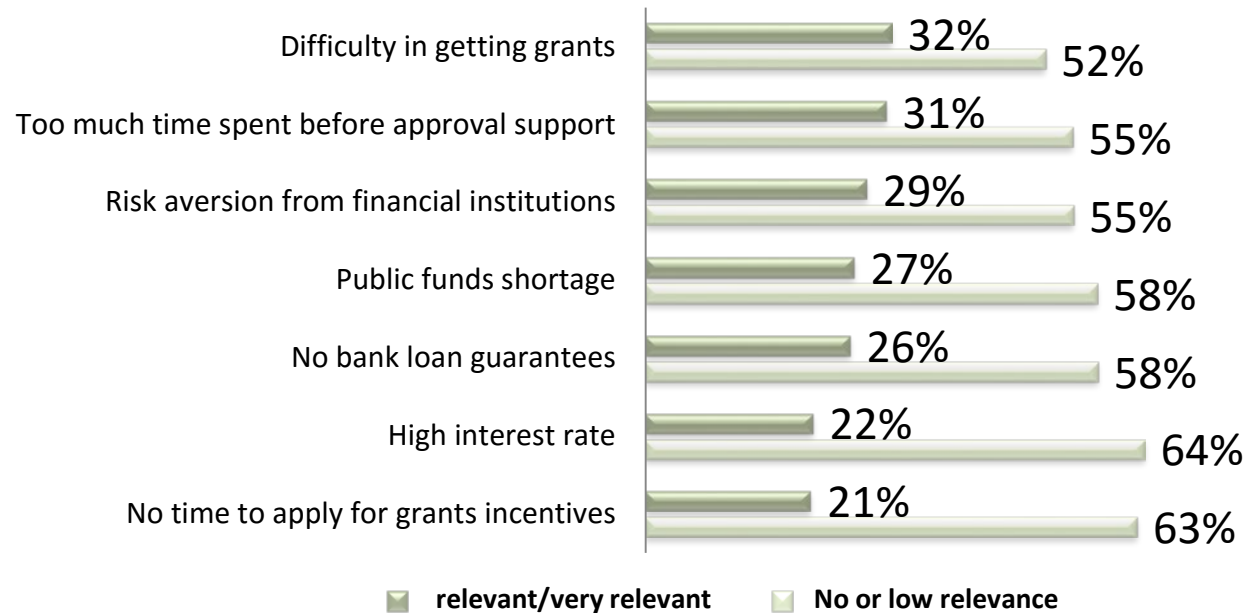


- small number of firms have received public grants or EU funding (5.4% and 3.6% respectively)

- Other sources
 - artistic creation (14%)
 - specialized design (10%)
 - sound recording and music publishing activities (11%)

Obstacles to obtaining financing:

Overall, of relatively low importance for the majority of firms



*Likert-type scales 1=no relevance, 5= very relevant

N=1052

➤ The low importance of financing obstacles at start-up may be related to limited needs for finance

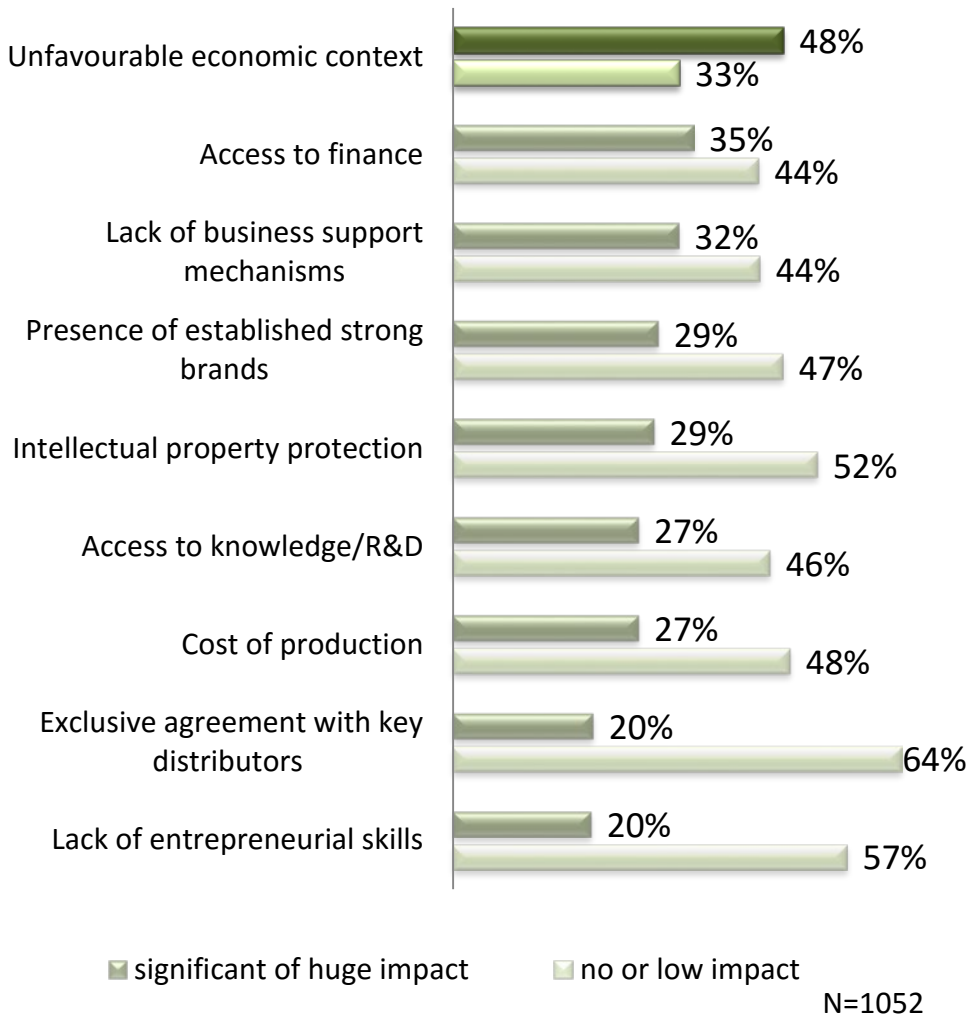
➤ Country Results:

➤ Lower obstacles for Denmark

➤ Relatively higher for Greece and Italy, especially those related to:

- public funds shortage
- difficulty in getting grants
- time spent before financial support approval

Entry barriers in the CIs are not widely perceived: Biggest barrier is the unfavourable economic context



*Likert-type scales 1=no relevance, 5= very relevant

- Overall, entry barriers are not that critical , but are quite sector specific.
- Access to finance, most important barrier for:
 - software publishing
 - motion picture, video and television
 - sound recording and music publishing sectors
- Intellectual property rights , most important barrier for:
 - sound recording and music publishing
 - software publishing
 - artistic creation
- Country Results:
 - Greek and Italian firms face the most important entry barriers, mainly related to :
 - unfavourable economic climate
 - access to finance

Obstacles to growth

Factors hindering growth:

Main barrier is the current economic climate



The current economic climate is the most important inhibiting growth factor especially for firms in:

- advertising
- motion picture, video and television activities
- photographic activities

3. Linkages, Networks and Knowledge Spillovers

Extent of competition:

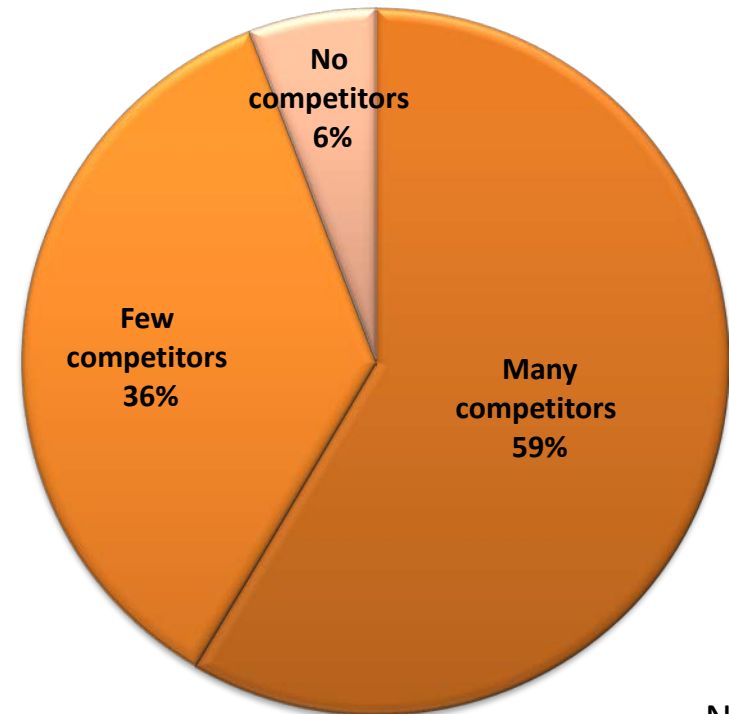
Most firms face multiple competitors

More intense competition for firms active in:

- Photography
- Sound recording
- Advertising
- Architecture

and located in :

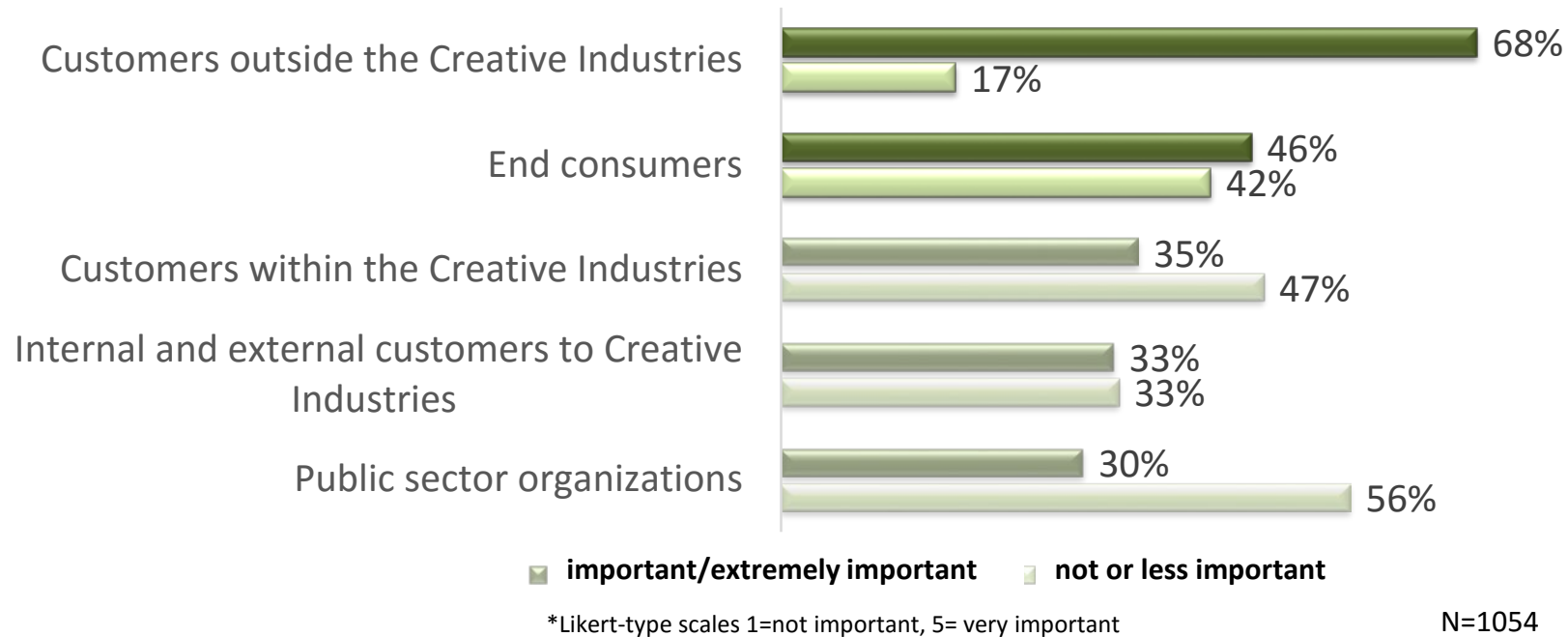
- ❖ Sweden
- ❖ UK
- ❖ Greece



N=1047

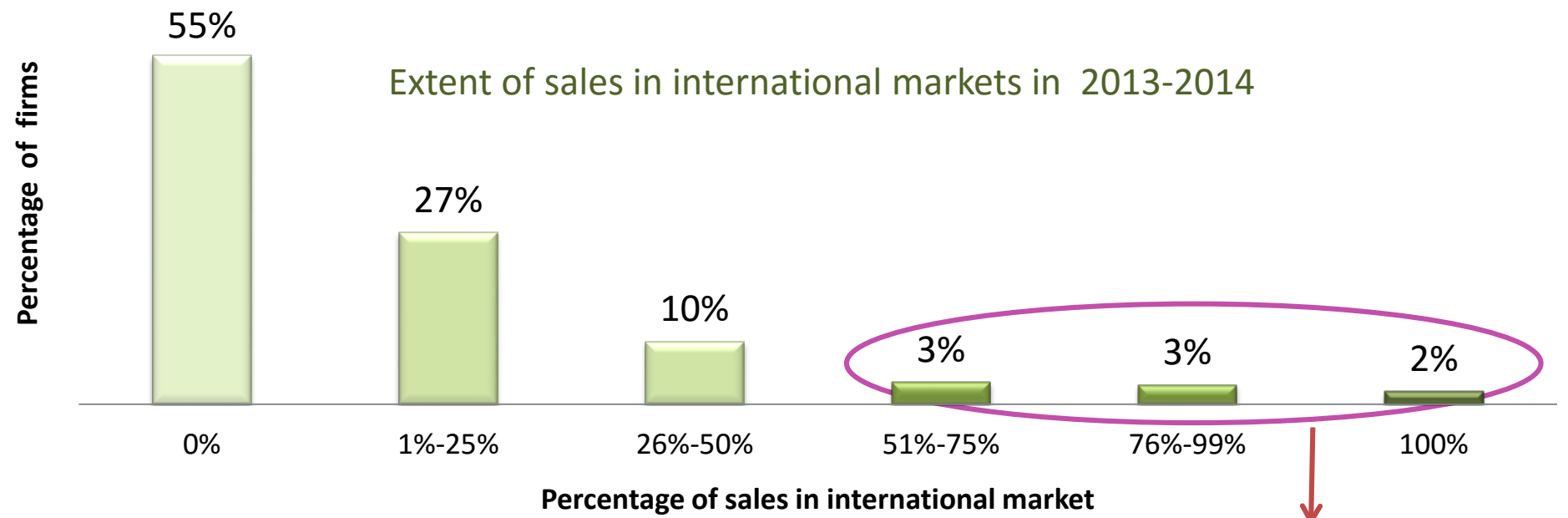
Customers:

70% are oriented to customers outside the CIs



- Customers outside the CIs are the most important source of revenue, especially for firms in
 - computer programming
 - advertising
 - architectural activities
- End consumers, are major customers for firms in
 - artistic creation, photographic and architectural activities

Nearly half of firms have export activity (accounting for 30% of sales on average)



Extrovert

- Software Publishing (63%)
- Sound recording and music publishing activities (58%)
- Architectural activities (19%) ↓
- UK (72%)
- Italy (60%)
- Sweden (30%) ↓

Highly Extrovert

- Computer Programming
- Specialized Design Activities
- Denmark
- UK

Sources of knowledge and networking activities

Knowledge Sourcing:

Customers are most important; “open sources” are third

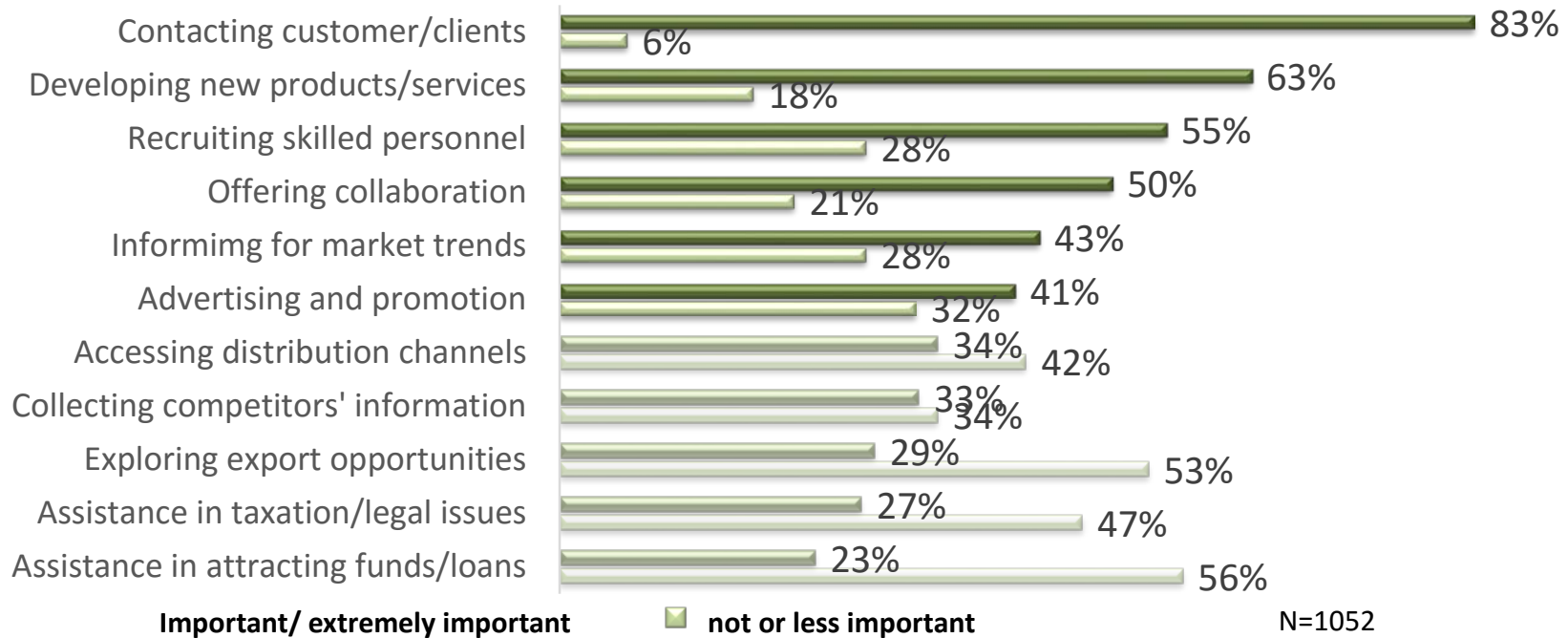


In-house knowledge is a major knowledge source for firms in:

- computer programming
- advertising
- software publishing
- motion picture, television and video activities

The multi-faceted importance of networking

Gaining access to customers and clients



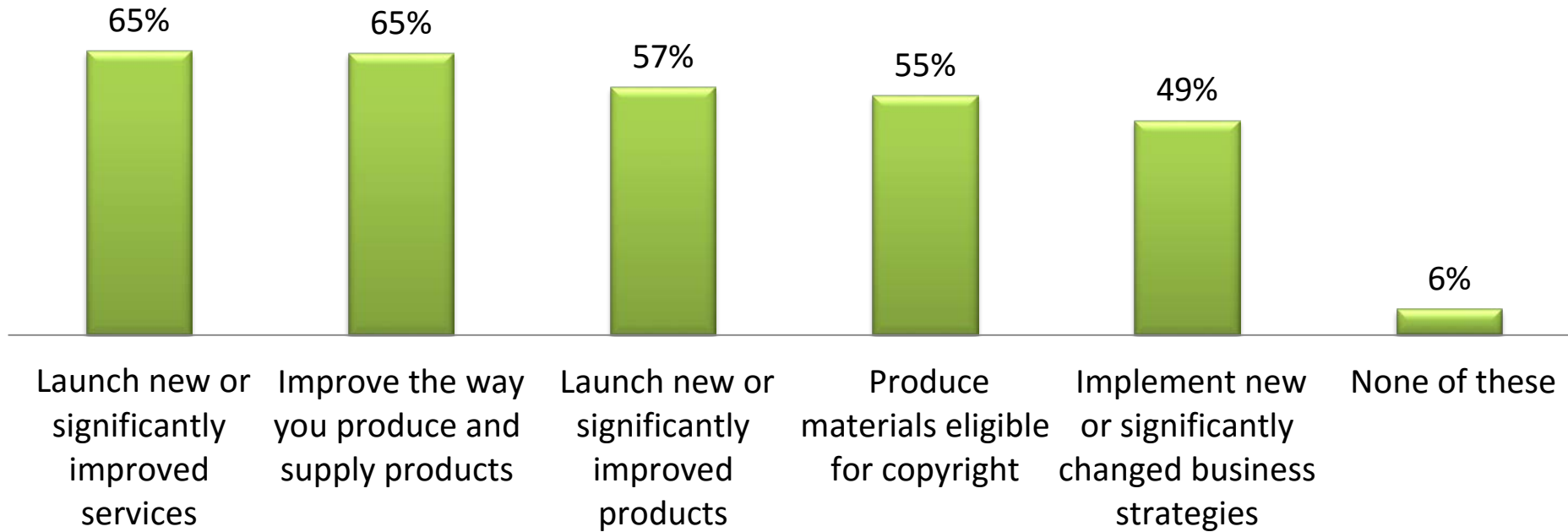
*Likert-type measurement format 1= not important , 5= very important

- Photographic firms : advertising and promotion (3rd most important networking activity)
- Artistic creation: offering opportunities for collaboration (3rd most important networking activity)
- Greek firms : providing information for market trends (2nd most important networking activity)
- Swedish firms : offering opportunities for collaboration (2nd most important networking activity)

Innovation
(direct and indirect effects)

High Innovative

94% introduced at least one innovation in last 2 years



computer programming
77%

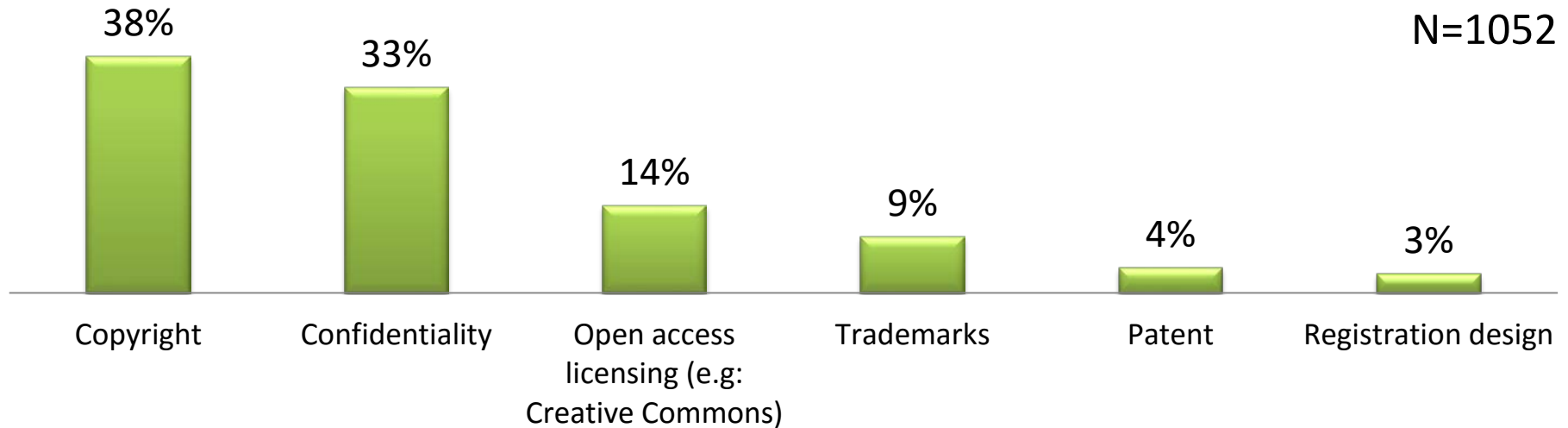
Greece 71%,
Italy 79%

advertising
71%

artistic creation
82%
UK 64%

Innovation Protection:

Made limited use of formal protection methods



Copyright

- Sound recording & music publishing activities (79%)
- photographic activities (71%)
- artistic creation (66%)
- motion picture, video and television (51%)
- architecture (47%)
- Sweden (60%)
- UK (55%)

Confidentiality

- advertising (37%)
- computer programming activities (36%)
- specialized design activities (23%)
- Greece (45%)
- Italian (47%)

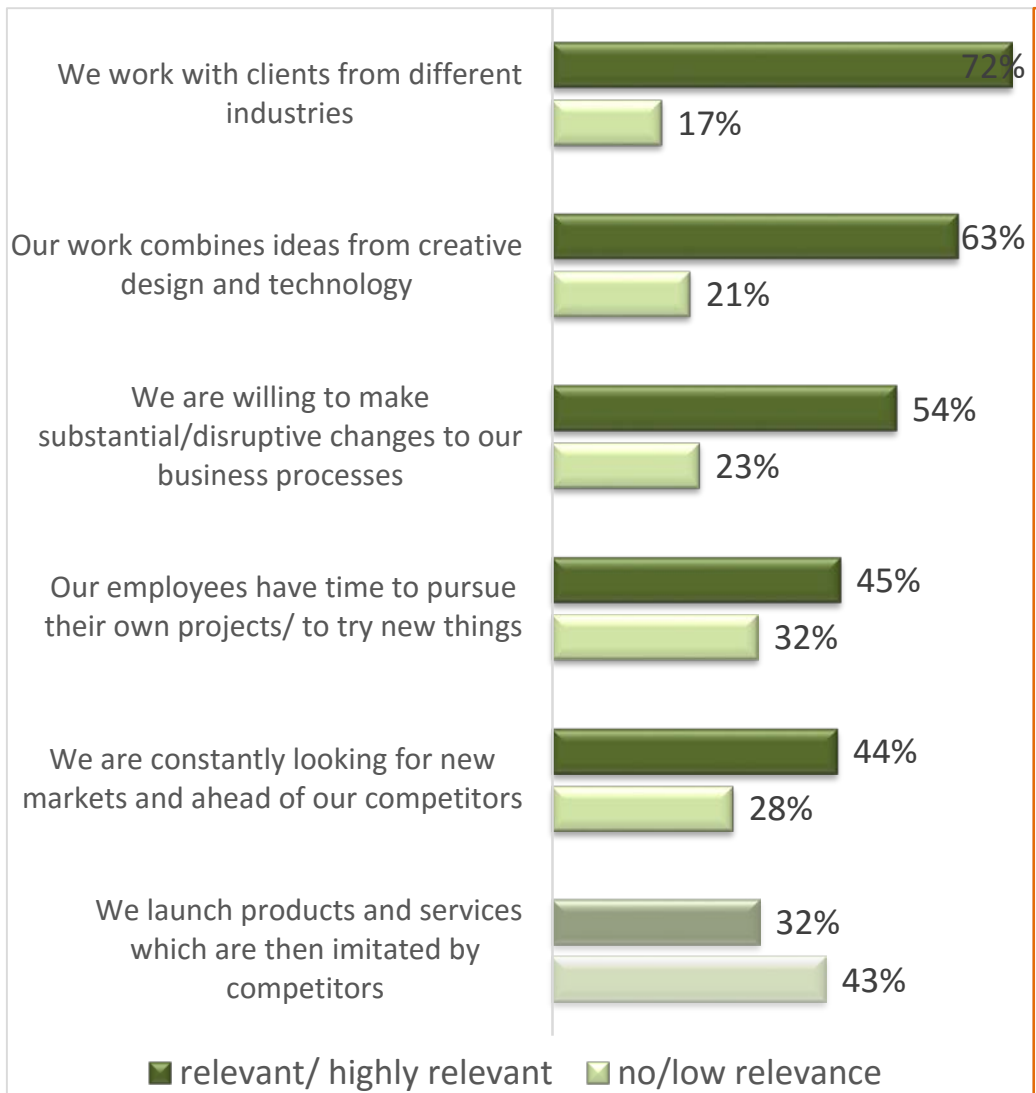
Creative commons

- computer programming (20%)
- advertising (14%)
- software publishing (12%)
- Denmark (18%)
- Italy (19%)

Registration design and trademarks

- specialized design

Innovation activities among Creative Industry Firms: Strong engagement with clients in different industries



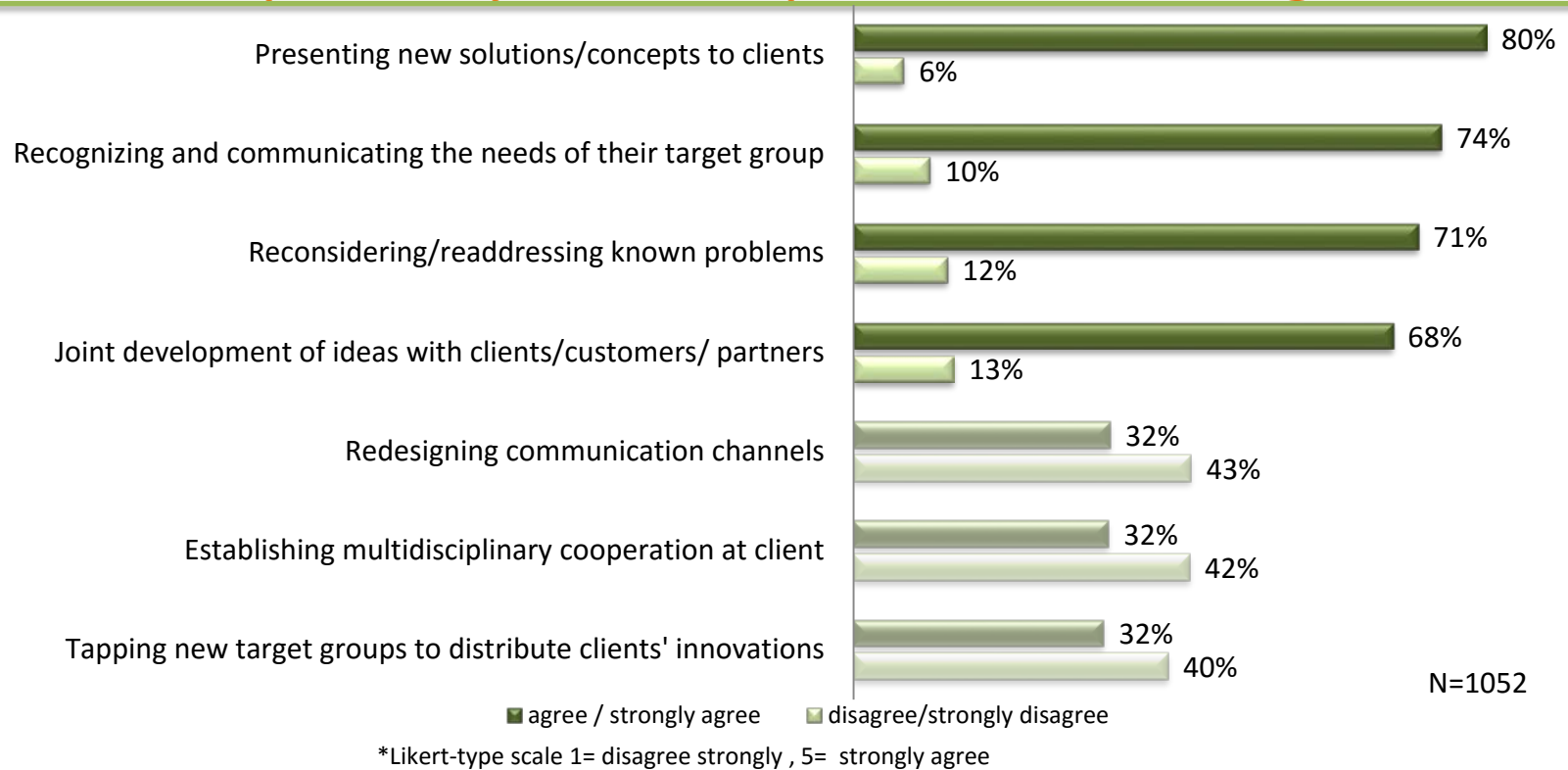
- **7 out of 10 firms work with clients from different industries**
 - **Especially, firms in advertising, specialised design and computer programming (B2b activities, cross sectoral linkages)**
- **6 out of 10 firms combine ideas from creative design and technology**
 - **Especially firms in software publishing, advertising, architecture, motion picture and specialized design**

*Likert-type scale 1= no relevance , 5= highly relevant

N=1052

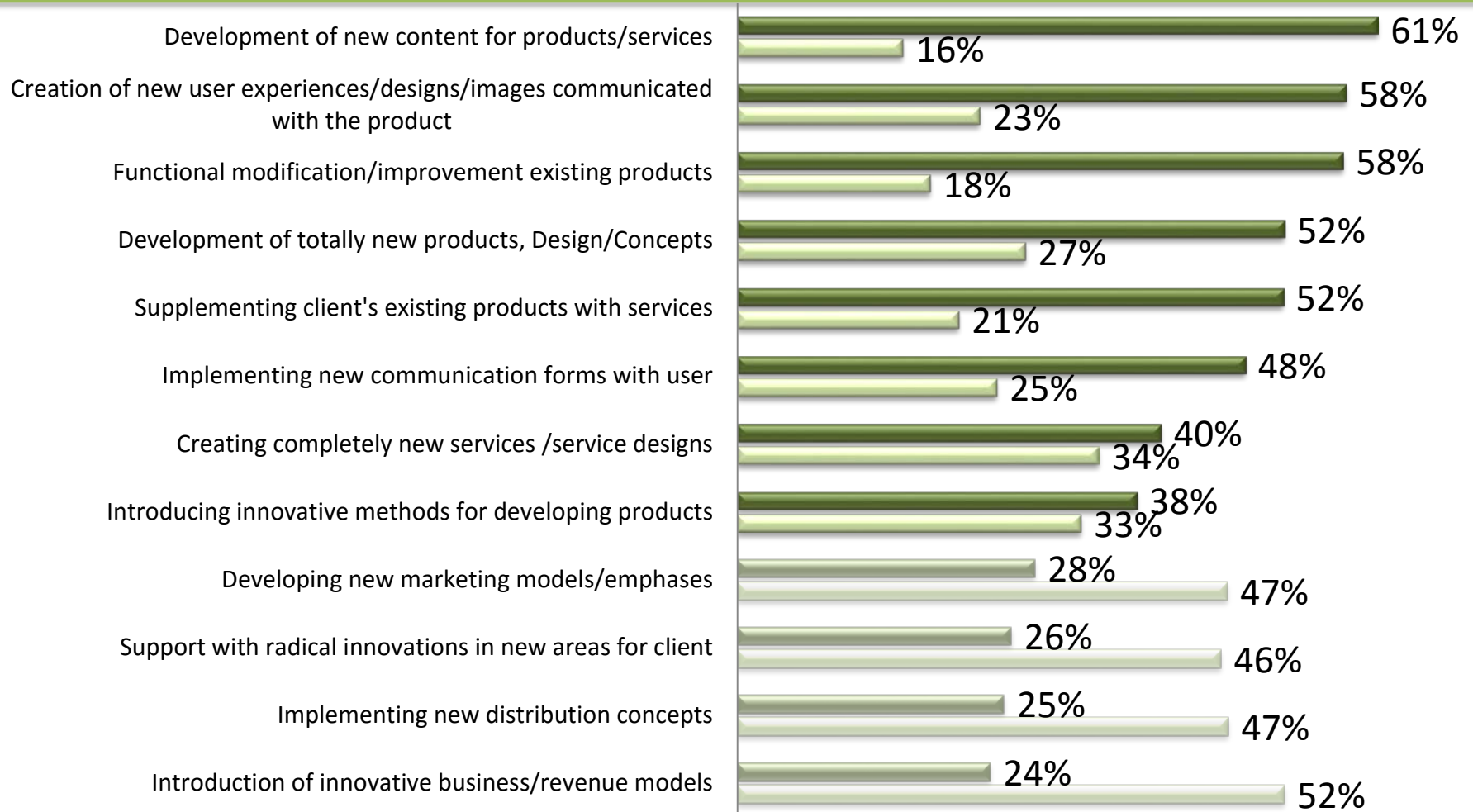
Interactions with clients:

Multiple ways of cooperation adding value



- Presenting clients with new solutions is the most important way of interaction for firms in
 - architecture, advertising, computer programming and specialized design activities
- Recognizing/communicating the needs of their target group is most important for firms in
 - sound recording and advertising

Multiple Innovation Benefits for Clients



■ agree / strongly agree

■ disagree/strongly disagree

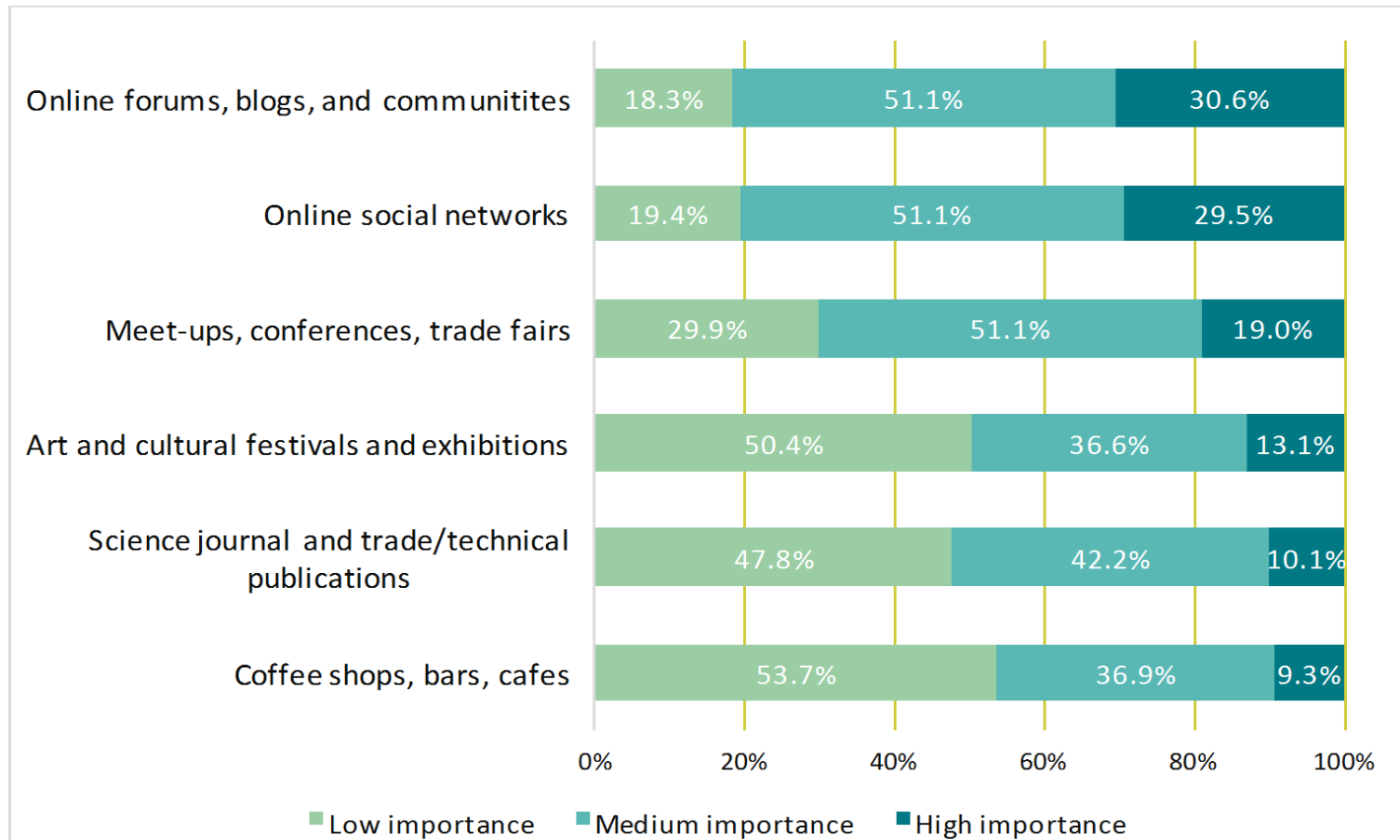
N=1054



High rates of innovation but...

- Not new to the world technology, little traditional R&D, very few protect with patents
- Instead, largely service-oriented, continuously attending to design and user-experience
- They use STEM skills, but in combination with Arts and Humanities skillsets- 'fusion' (STEAM)

New channels to access innovation among Creative- Digital- IT freelancers



Firm growth

Change in sales (2012-2014):

55% of firms exhibit significant increase

Increase 55%

Decrease 1 out of five

	Significant increase (>5%)	No significant change (+/- 5%)	Slight decrease (-6% to -10%)	Significant decrease (-11% to -20%)	Very significant decrease (>20%)	Total
Greece	47%	19%	11%	12%	11%	168
Italy	44%	29%	9%	8%	10%	262
Sweden	45%	32%	11%	2%	10%	164
UK	71%	17%	6%	2%	5%	263
Denmark	63%	28%	4%	2%	3%	178
Total	55%	24%	8%	5%	8%	1035

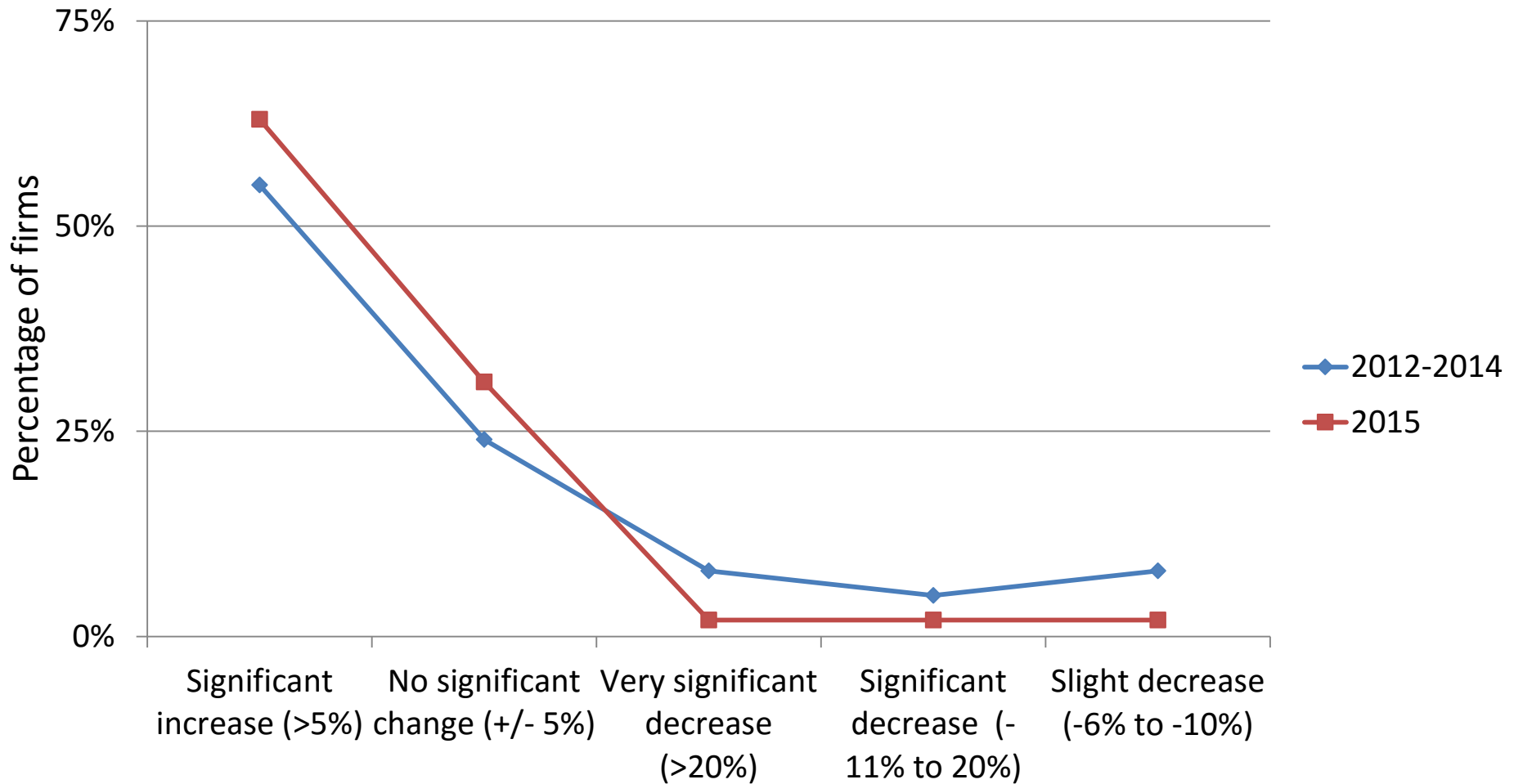
↑ sound recording & music

↑ software publishing

↓ motion picture

↓ architecture

Most also forecast sales growth for 2015



Change in employment (2012-2014):

No growth is the norm

Increase 31%

Decrease 6%

	Significant increase (>5%)	No significant change (+/- 5%)	Slight decrease (- 6% to - 10%)	Significant decrease (- 11% to - 20%)	Very significant decrease (>20%)	Total
Denmark	33%	57%	4%	2%	4%	178
Italy	30%	57%	5%	3%	5%	259
Sweden	15%	77%	5%	1%	2%	149
UK	35%	59%	3%	2%	1%	263
Greece	39%	45%	6%	6%	3%	169
Total	31%	58%	4%	3%	3%	1018

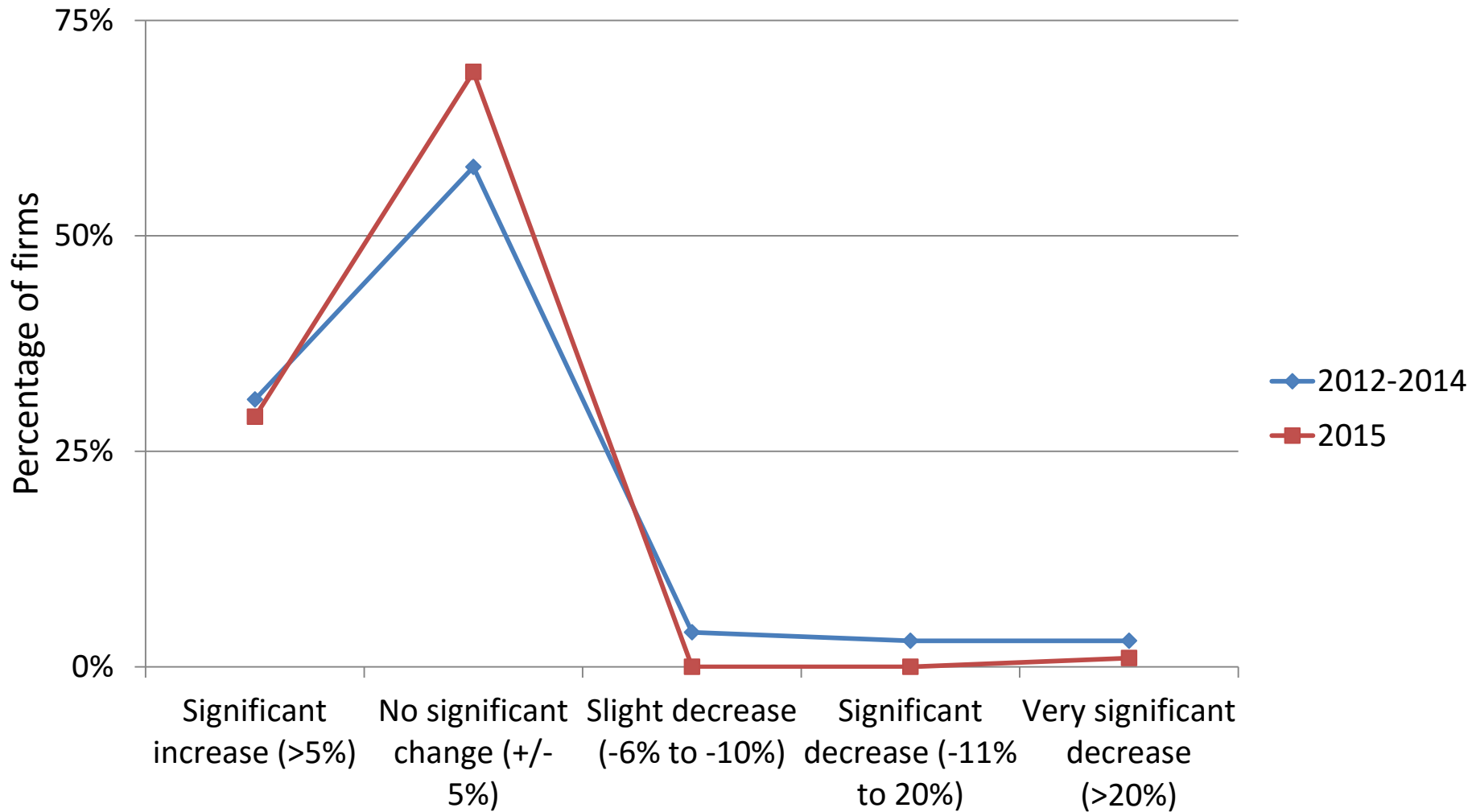
↑ computer programming **stability**

↑ motion picture

↑ sound recording and music publishing

↑ specialized design

But many forecast future employment growth



Average change in operating profit (2012-2014):

More firms exhibit significant increase

Increase 45%

Decrease 21%

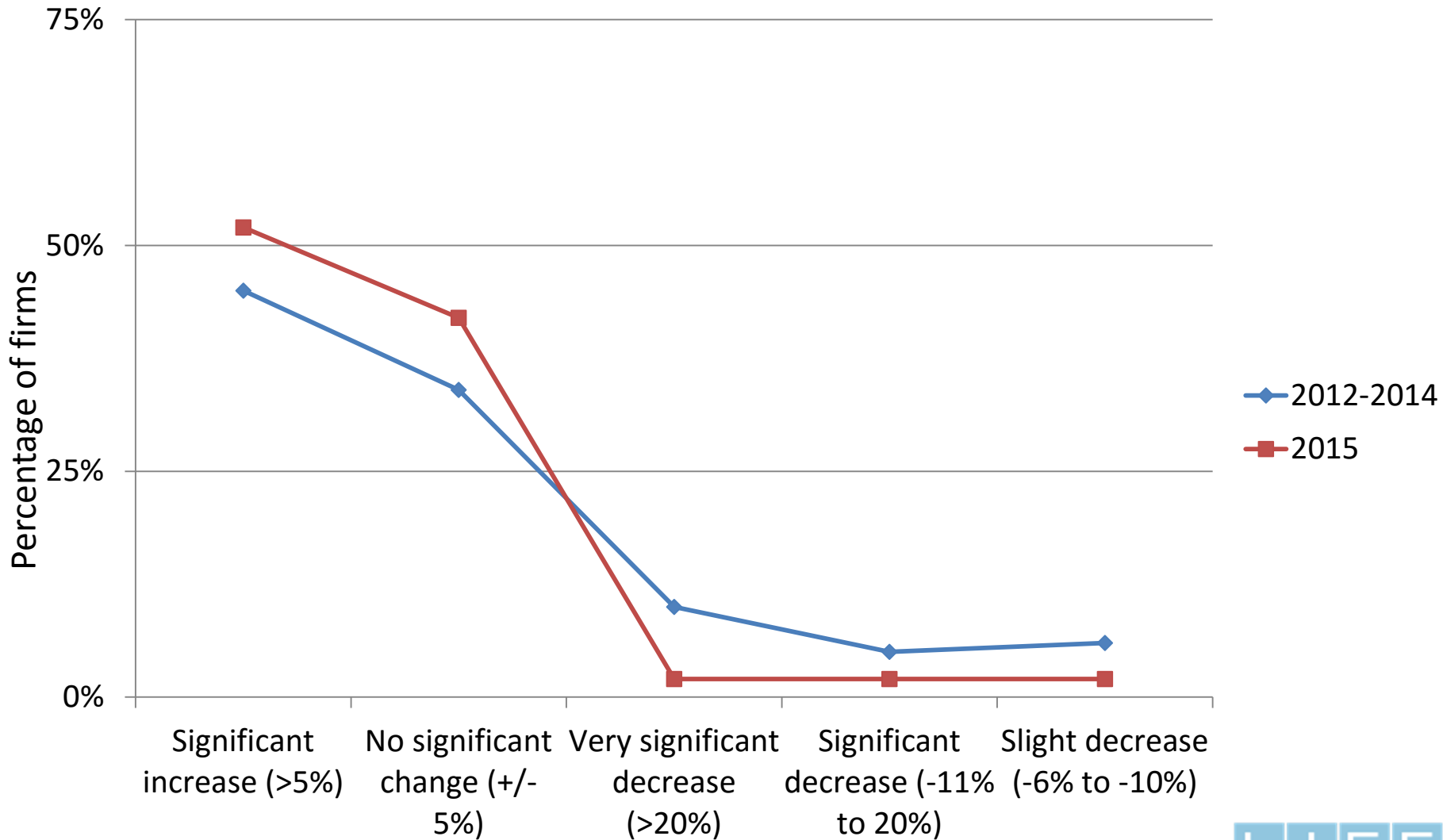
	Significant increase (>5%)	No significant change (+/- 5%)	Slight decrease (- 6% to - 10%)	Significant decrease (- 11% to - 20%)	Very significant decrease (>20%)	Total
Denmark	57%	30%	6%	3%	4%	174
Italy	30%	47%	10%	8%	6%	253
Sweden	37%	44%	8%	3%	8%	131
UK	62%	24%	8%	3%	3%	260
Greece	37%	28%	16%	10%	10%	167
Total	45%	34%	10%	5%	6%	985

↑ architecture

↑ motion picture

↑ software publishing

And most forecast future growth in profits



Average exports change (2012-2014):

No change is the norm

Increase 23%

Decrease only 6%

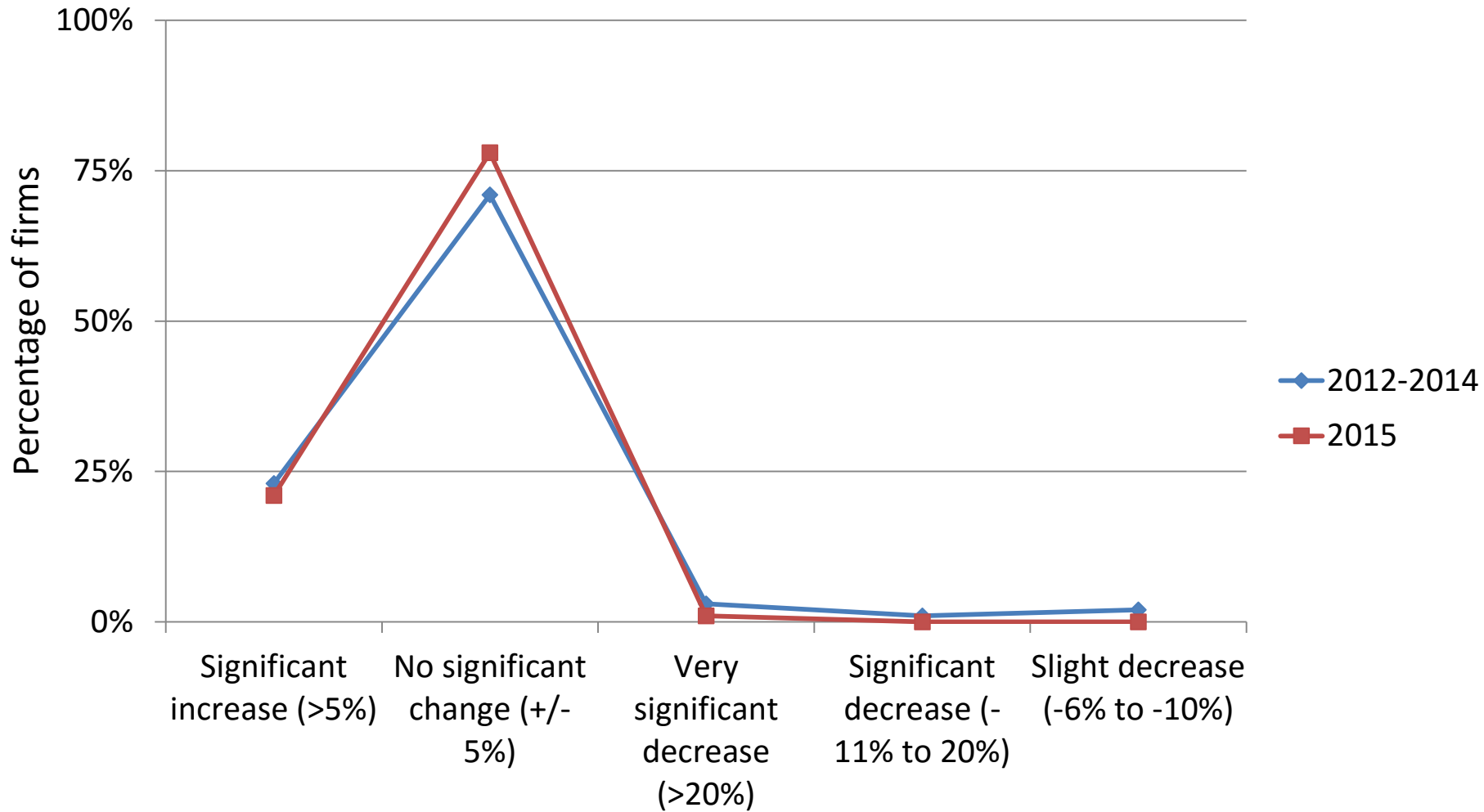
	Significant increase (>5%)	No significant change (+/- 5%)	Slight decrease (-6% to -10%)	Significant decrease (-11% to -20%)	Very significant decrease (>20%)	Total
Denmark	29%	67%	1%	1%	2%	168
Italy	15%	81%	2%	1%	1%	237
Sweden	11%	72%	11%	2%	5%	123
UK	33%	64%	1%	1%	1%	204
Greece	28%	66%	5%	1%	1%	167
Total	23%	71%	3%	1%	2%	899

↑ Software publishing (47%)

↑ Sound recording and music publishing (33%)

stability

Little change in exports expected in the future



Conclusions
Key Messages

Why an entrepreneurship survey in the CIs?

Main messages

- **Micro enterprises** with flexible employment forms/ freelancers prevail (so they are bigger than they seem and they can have access to a larger pool of resources and capabilities).
- **Networking** provide access to wider pools of resources and capabilities.
- **Networking** also linked to very extensive innovation activities (direct and indirect).
- **Well-educated human capital** both in terms of founders and employees
- **Establishment of firms with small initial investment requirements, mainly self-financed ventures**
- **Different set of motivations** for setting up a company compared to typical (archetypal) entrepreneurs
- Firms in CIs can stimulate innovation in and add value to **whole range of other industries** (including manufacturing), both forward and backward supply chain linkages
- **High levels of innovation** ... but much not captured by traditional metrics

Entrepreneurship in the CIs: Measurement issues

- Need to continue to measure innovation and entrepreneurship in CIs, which are largely micro businesses not captured by the CIS
- Regular Community Entrepreneurship Survey in CCIs and in specific sectors of CCIs or as part of a more generic European Survey on Knowledge Intensive Entrepreneurship.

Policy implications and suggestions

- **GROWTH:** A general policy agenda to grow out of stagnation in Europe should also include a “creative and cultural” dimension in a “balanced industrial mix”.
- **Cross-spillovers of CCIs:** forward and backward supply chains linkages → i.e. develop manuserVICES.
- **SMART CREATIVE CITY:** Link the promotion of entrepreneurship in CCIs to the concept and practice of smart city (effective and efficient infrastructure, space for experimentation, promoting innovation and entrepreneurship to revitalize the local city economy).
- **POOL of WOULD BE ENTREPRENEURS:** Train and coach University students, young graduates and researchers in CCIs entrepreneurship. Not only spinoffs.

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Policy Issues and Suggestions

1. Projects and Networks

Recognise that innovation increasingly occurs through projects

Projects draw on networks (often of micro firms & individuals)

Increasingly cut across conventional sectoral division

Formation and re-formation of networks is key

Access to networks, and networking capabilities

Physical spaces – “creative (inspiring) + smart places”

On-line spaces – connecting people across Europe

(including balancing skill gaps and gluts across Europe)

Networks also increasing source of finance – crowdfunding

Issues of ownership of property rights from project based arises



Policy Issues and Suggestions

2. Skills and Collaboration

What skill needs are emerging & will become widespread

Creative + Tech skill combinations are very powerful
(note, in projects, not necessarily in individuals)

Growth in ability to complement others – T-shaped skills

Increasing need for skills to deal with ill-structured problems
(which people are much better than computers at dealing with)

Develop skills for would-be entrepreneurs (aware of risks)

Skill developments should also be adaptable for resilience



Policy Issues and Suggestions

3. Encourage Experimentation

Encourage organisations to experiment

- Processes of innovation overly conservative?
- Micro-experimentation – learning by failing (early and cheaply)

Experimentation in innovation measures and measurement

- New data – e.g. CRE8TV.EU survey of micro/new CI firms
- Innovation measurement very dependent on surveys, which agencies are reluctant to change (limited “real estate”)
- Need better insights into “hidden” and “emerging” systems
- Encourage experimental methods - use of web-sites.

Questions & Discussion

Thank you very much for your
attention!